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POWER



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EUROPEAN REALITIES – POWER

Conference Proceedings

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CONTENTS

9 FOREWORD

I. POWER AND THE DIGITAL UNIVERSE – MEDIA, EDUCATIONAL AND SOCIAL ASPECTS

- 13 **Katerina Fotova Čikovič**
EFFICIENCY OF TERTIARY EDUCATION IN
CROATIA: REVIEWING DEA APPLICATIONS
- 30 **Andrej Brník, Ľubica Bôtošová**
THE HISTORY OF STUDENT RADIO
BROADCASTING IN SLOVAKIA AS PART OF THE
CULTURAL HERITAGE OF THE COUNTRY
- 51 **Borko Baraban, Lorna Rajle**
LANGUAGE ANALYSIS OF THE POLITICAL
DISCOURSE ON THE EXAMPLE OF MEDIA
COVERAGE OF THE CORONAVIRUS
- 79 **Tatjana Ileš, Tomislav Marijanović**
THE POWER OF TELEVISION SPECTACLE:
FEMINISM AND POPULAR TELEVISION
- 102 **Emma Kovačević**
THE ROLE OF SOCIAL NETWORKS/MEDIA USE
IN THE ACCEPTANCE OF ANTI-VACCINATION
CONTENT
- 122 **Uwe Eisenbeis / Magdalena Ciepluch**
TECHNOLOGY ACQUISITIONS AS THE NEW
POWER. AN APPROACH ON HOW GAFAM HAVE
MANAGED TO WIN THE WAR FOR INNOVATION,
THE WAR FOR PATENTS, THE WAR FOR TALENTS,
AND THE WAR FOR DATA

- 145** **Mario Žuliček, Darijo Čerepinko, Željka Bagarić**
RATIONAL AND EMOTIONAL APPROACH IN PUBLIC
COMMUNICATION IN THE TIMES OF PANDEMICS:
A CALL-TO-ACTION MESSAGE RESEARCH
- 169** **Željko Pavić, Marina Đukić, Adrijana Šuljok**
AGE DIFFERENCES IN THE RELATIONSHIP
BETWEEN MEDIA USE AND ATTITUDES ABOUT
VACCINATION

POWER IN THE LEGAL, ECONOMIC, AND SCIENTIFIC ENVIRONMENT

- 187** **Dubravka Pekanov, Ivo Mijoč, Irena Jadrešić**
CHALLENGES OF THE GREEN TRANSITION:
IMPLICATIONS FOR THE OPERATION OF ENERGY
COMPANIES
- 205** **Nives Mazur Kumrić, Ivan Zeko-Pivač**
LANGUAGE AND POWER – AN INSIGHT INTO THE
REGULATORY FRAMEWORK AND PRACTICE OF
LANGUAGE ARRANGEMENTS OF THE COUNCIL OF
THE EUROPEAN UNION
- 223** **Dubravka Klasiček, Tomislav Nedić**
THE POWER OF INTERNET SERVICE PROVIDERS
(ISPS) OVER DIGITAL LIFE – CIVIL LAW INSIGHT
- 247** **Višeslav Kirinić**
MANUFACTURING OF CONSENT IN THE HYPER-
INFORMATION AGE
- 265** **Marija Šain, Iva Buljubašić, Vlatka Mihaljević**
THE POWER OF (UNCONVENTIONAL) MARKETING
IN FUNDRAISING: THE PERSPECTIVE OF THE
CULTURAL SECTOR
- 287** **Alena Kusá, Ladislav Pátík**
THE BRAND AS A TOOL OF MARKETING AND
COMMUNICATION POWER

- 310** **Ivana Nobilo**
CUSTOMER SERVICE SATISFACTION AND
CULTURAL DIFFERENCES IN CUSTOMER SERVICE
EXPECTATIONS IN SWITZERLAND

**POWER IN CULTURAL AND ARTISTIC SPACE
AND PRODUCTION**

- 331** **Tihana Škojo, Zdravko Drenjančević**
THE ROLE OF POPULAR SONGS IN CONFIRMING
CROATIAN NATIONAL IDENTITY
- 352** **Lana Skender**
THE SPECTATOR PHENOMENON AND THE POWER
OF THE GAZE
- 369** **Maria Inês Pinho, Sérgio Veludo**
and Maria Fátima Lambert
CULTURAL HERITAGE AS A TARGET IN CONFLICT
SCENARIOS
- 388** **Daria Kuharić**
CULTURAL GEOGRAPHY: OLD SLAVONIAN OAK
TREES
- 410** **Anita Dremel**
BOURDIEU ON POWER, CULTURE AND
SOCIOLOGY OF TASTE: THE CASE OF MARIJA JURIC
ZAGORKA
- 427** **Igor Loinjak**
POWER AS THE FOUNDATION OF CULTURAL
CAPITAL AND A PREREQUISITE IN CREATING THE
VALUE OF AN ARTWORK
- 444** **Biljana Marković**
COMPUTER AND INFORMATION LITERACY – A
TOOL FOR ACHIEVING THE POWER OF NURSING
PROFESSIONALISM IN GENERAL HOSPITALS

FOREWORD

The international scientific conference European realities – Power, held on March 25, 2022, is the fifth continuation of the scientific meeting started in 2013. Conference deals with interdisciplinary reflection and analysis of cultural, educational, artistic and scientific policies in the European environment, as well as their consequences on specific aspects of the contemporary social and cultural environment. The theme of the conference organized by the Academy of Arts and Culture in Osijek is POWER, in the broadest sense of the word, as a social phenomenon that implies the possibility of creating or preventing some changes. How to adapt depends on a collaborative and flexible approach, but also an approach that opens new spaces for cooperation.

In this context, power largely depends on cultural, media and economic trends, and this conference questioned who and in what way defines, transfers and creates power and strengthens the synergy between cultural, educational, artistic and scientific policies and public communications of the modern era, enabling the establishment of stimulating research platforms. The consequences of the COVID-19 pandemic affected the distribution of power in various economic, media, scientific, legal, educational and cultural-artistic aspects, and it is necessary to encourage the academic community to interdisciplinary reflection on the problem of power in our modern times and an analytical approach to dealing with power relations in the aforementioned phenomena.

In this sense, the basic goals of the conference were set, which were also achieved by publishing the papers in this proceeding.

There are three units within this edition:

1. Power and the digital universe – media, educational and social aspects
2. Power in the legal, economic, and scientific environment
3. Power in cultural and artistic space and production

The conference gathered more than 140 participants from eleven countries (Belgium, Ecuador, Croatia, India, Germany, Portugal, United States of America, Slovakia, Serbia, Switzerland, Spain), and a total of fifty papers were accepted for publication. The interest of participants from other

countries points to the importance of the overarching theme of the conference and the encouragement of further research with the aim of strengthening the synergy between the activities of culture, economy and public communications.

At this point, it should be noted that a collection of papers written in Croatian language – Power 2023 – has also been published, which also discloses the papers of the participants of the International Scientific Meeting European Realities – Power. These collective editions, we dare to say, complement each other excellently and make a valuable contribution to scientific reflection on the extremely dynamic changes in the fields of culture, media and management that we witness every day.

Once again, we would like to thank the members of the Organizational, Scientific and Program Committee, the editors and reviewers, and all the authors and collaborators who contributed to the creation of this Proceedings and the successful conference.

Associate Professor Iva Buljubašić, PhD,
president of Scientific and Program Committee

Associate Professor Marija Šain, PhD,
president of Organizing Committee

I. Power and the Digital Universe – Media, Educational and Social Aspects

Katerina Fotova Čikovič, PhD¹

EFFICIENCY OF TERTIARY EDUCATION IN CROATIA: REVIEWING DEA APPLICATIONS

Scientific Paper
<https://doi.org/10.59014/NIUC6022>

Abstract

Due to its impact on the quality of the human capital, and thus, the country's economic growth, education is considered a top priority and a strategic sector in every economy. This is the reason why education is in general publicly financed by governments throughout the world. Therefore, the efficiency of tertiary education needs to be consistently evaluated and measured.

The main goal of this article is to survey and present all the published studies investigating the efficiency of tertiary education in the Republic of Croatia with the application of the non-parametric methodology Data Envelopment Analysis (DEA). Moreover, other goals of the study are to explore their used DEA models, the selected inputs and outputs as well as their findings and recommendations.

The methodology used for this research is the extensive literature review of studies that employ the Data Envelopment Analysis (DEA) in the efficiency evaluation of higher education in Croatia. The research approach includes a survey of the most relevant scientific databases for this research (i.e. Scopus, Web of Science – SSCI and SCI papers and the Croatian Scientific Bibliography CROSBI). The terms “Data Envelopment Analysis”, “Education” and “Croatia” were used for the data collection. After a total of 41 hits (5 in Scopus, 23 on WoS and 13 on CROSBI), a manual evaluation of the relevance and a selection has been made with the criterion of paper relevance. This ultimately led to 8 articles that investigate the relative efficiency of Croatian tertiary education. Thus, this article presents the findings of the most relevant published work regarding the efficiency of Croatian higher education and its findings are invaluable to the higher education institutions, the government, as well as academic members and the interested public.

Keywords: Croatia, Data envelopment analysis, education, efficiency.

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Introduction

Education and knowledge are the main drivers of economic growth and development, and thus, the public's awareness of the importance of higher education is growing, as is the number of students enrolling in higher education institutions (Mihaljević Kosor i Abramović, 2019). Moreover, the importance of investing in knowledge and education has been recognised by many governments and by the European Commission's 2020 strategy, which introduced education as one of the EU targets and most crucial areas (Malesević Perovic i Mihaljević Kosor, 2020). And even though the notion that a highly educated population in a country leads to its economic progress, prosperity, more innovation, social cohesion and lower unemployment rates is well known, the resources for the education sector are limited and therefore, should be used efficiently, which is highly stimulated by governments, especially as the interest for higher education has increased worldwide (Arbula, 2012). It is as a result of the more restrictive fiscal policies that more and more countries worldwide undertake, that the consistent evaluation of higher education efficiency has become an issue. Still, in most countries worldwide, higher education systems are financed from public funds (Malesević Perovic i Mihaljević Kosor, 2020). As Aristovnik (2012) states, "tight budgets and demanding citizens put governments under increasing pressure to show that they are providing good value for money". Moreover, expenditures on higher education "signify an important tax burden on taxpayers and the efficiency with which inputs produce the desired outputs is thus an important public policy issue" (Obadić i Aristovnik, 2011).

There are two approaches for measuring efficiency in the scholarly literature: parametric and non-parametric methodologies. Since the educational sector is a non-profit public sector that has goals that differ from the conventional commercial organisations, it is not suitable to be evaluated through regression analysis. The leading non-parametric methodology Data Envelopment Analysis (DEA) is the most appropriate methodology for the non-profit sectors, due to its possibility to include multiple input and multiple output variables (Obadić i Aristovnik, 2011). DEA today is one of the widely recognized mathematical linear programming techniques that is applied in many industries, but according to Emrouznejad i Yang (2018), it is mostly applied in banking, agriculture, supply chain,

transportation and public sector. A more thorough presentation of the DEA methodology is laid out in Section 3.

This paper aims to identify, present and analyse the relevant published papers that focus on efficiency evaluation of tertiary education in Croatia with an implementation of the Data Envelopment Analysis methodology. Other goals are to present the leading non-parametric methodology Data Envelopment Analysis (DEA), its strengths and limitations and its potential for wide use in many different industries.

The remainder of this paper is structured as follows. After the Introduction, in Section 2, theoretical background on both the efficiency of tertiary education and Data Envelopment Analysis (DEA) is presented. Section 3 reveals the research approach and the fourth section presents the results, i.e. the applications of Data Envelopment Analysis in tertiary education in Croatia. The fifth and last section opens a discussion and concludes the paper.

Theoretical background

Efficiency of tertiary education

Understandably, the efficiency of the public sector has been commonly examined, due to the pressure of the public. Moreover, the efficiency of the educational system is even more tempting, due to the crucial role of education in each economy's growth, prosperity, rate of unemployment and development. Since the introduction of the DEA methodology in 1978, "a considerable number of articles have been published on the educational sector, including primary and secondary education, and vocational and tertiary education" (Villano i Tran, 2019).

DEA's decision-making units in education can be national economies, higher education institutions, students, etc. Moreover, there are many different efficiencies to be examined in HEIs (higher education institutions), such as cost efficiency, research efficiency, teaching efficiency and the fee-paying enrolment efficiency (Ranjan i Singh, 2021). According to Mihaljević Kosor i Abramović (2019), the overall efficiency evaluation studies of higher education institutions are still rare and DEA has been mostly

applied in studies regarding the United States, Great Britain, Australia and Italy.

Abbott & Doucouliagos (2003) have investigated the efficiency of Australian universities in 1995 employing the DEA with four inputs (total number of academic staff – full-time equivalent, Non-academic staff, expenditure on all other inputs other than labor inputs and value of non-current assets) and four outputs (number of equivalent full-time students (EFTS), the number of post-graduate and undergraduate degrees enrolled, as well as the number of post-graduate degrees conferred and the number of undergraduate degrees conferred).

Perovic et al. (2017) focus on the educational efficiency of the biggest faculty in Serbia in 2013/2014. They have implemented the DEA methodology with the average secondary school grade and the number of scores earned on the entrance exam as inputs and the average grade achieved during the study and the length of study as outputs for their DEA model. Moreover, they included statistical variance analysis to expand and develop a model that would also assess the efficiency of the teaching process. Ranjan & Singh (2021) focused on the “impact of two-step categorical impact on the enrolment efficiency of 147 colleges in Bihar, one of the largest states of India”. Thus, they have employed the DEA methodology with the use of two Categorical Variables (university and location). Their obtained results indicate that 12 out of 14 subcategories significantly influence the overall efficiency frontier.

Arbona et al. (2022) employed the metafrontier Malmquist-Luenberger productivity index to assess the efficiency and quality of education in Columbia in the period from 2014 to 2017. They found that both efficiency and quality in the Columbian universities has been decreased in the observed period.

Geburu et al. (2021) have analysed the efficiency of higher education in Pakistani HEIs from 2017 to 2018. They have implemented DEA methodology for measuring the overall efficiency of HEIs, and, thereafter eliminated “the sensitivity of efficiency scores using the bootstrap technique”. Their results show that “12 out of 40 HEIs are efficient in their overall efficiency” and HEIs that note high efficiency in either teaching or research also note high efficiency in their overall performance.

Nader (2022) has applied the Multilevel frontier analysis to simultaneously analyse the efficiency scores of departments, faculties, colleges, and the university. However, he claims that the evaluation of efficiency is not so simple and their internal heterogeneities and complexities should be taken into consideration. He also found that “departments in comparison with faculties and colleges, play a more significant role in the overall performance of the university”.

Many cross-country studies examine the educational efficiency of the European Union countries. For instance, Dinca et al. (2021) have conducted research on the educational efficiency of 28 EU countries every three years, starting with 2006. In their study, they give new insights and a “complete image of the education system, creating a ranking for the countries, based on efficiency scores”. Yotova i Stefanova (2017) have measured the educational efficiency of nine EU member countries from Central and Eastern Europe (i.e. Bulgaria, the Czech Republic, Estonia, Latvia, Lithuania, Hungary, Poland, Romania, and Slovenia) in 2012. They have developed three models “due to the different character of output results of tertiary education that could be direct and indirect”. Their findings show that Latvia is most efficient in tertiary education expenditure in all of the three developed models, whereas Lithuania has noted relative efficiency in the first and the second model. On the other hand, Hungary and Estonia are the least efficient.

Agasisti & Berbegal-Mirabent (2021) have employed the DEA methodology with an unbalanced panel from 2011 – 2013 with “761 observations coming from 307 universities located in 8 European countries (Belgium, Switzerland, Germany, Italy, Lithuania, Portugal, Sweden and UK)” to examine whether the “strategic choices regarding international positioning and scope determine how efficient universities are in the allocation of their internal resources”. In their study, they identify three types of universities according to their internationalisation and scope as follows: world-class, flagship, and regional. Their findings reveal some new insights regarding the efficiency of higher education institutions (HEI) in Western Europe. Namely, they found UK and Belgium institutions to be most efficient, while Swiss and Portuguese institutions to be the least efficient.

Data envelopment analysis (dea)

DEA (hereafter Data Envelopment Analysis) is a methodology for measuring the relative efficiency of productive and non-productive units as decision-makers who use the same inputs and the same outputs but differ in the level of available resources and the type of activities in the process of their transformation (Cvetkoska, 2010). DEA is one of the leading and most popular “non-parametric, deterministic, linear programming technique that provides a piecewise frontier by enveloping the observed data points, and yields a convex production possibilities set” (Ahec Šonje et al., 2018). It has been extensively used in many industries since its introduction in 1957 by Farrell (Farrell, 1957) and its development in 1978 by Charnes, Cooper and Rhodes (1978).

DEA is a frontier method consisting of a series of optimizations (one for each entity included in the analysis). For each entity, the maximum measure of performance is calculated relative to the other entities in the observed sample. DEA is a non-parametric linear programming method used to measure best practices in technology and relative efficiency of units (called decision-making units or DMUs). What is crucial in data envelopment analysis is that the organisational units to be assessed should be relatively homogeneous (Fotova Čiković, 2021). “The focus in DEA is not on estimation on the average production function used by all units analysed but rather to identify the best practice units (DMUs), i.e. the relative efficient units, so that the best practice frontier is constructed and all analysed DMUs are related to the frontier” (Hartwich i Kyi, 1999). The “calculated frontier constitutes the model by which efficiency is measured” (Yotova i Stefanova, 2017).

The main advantage of the DEA methodology is the notion that, unlike regression analysis, a priori model specification is not required. Instead, DEA provides information on whether the analysed inputs and outputs of DMUs lie below or above the “efficient” limit (i.e. efficiency frontier). However, it should be borne in mind that this is a method that analyses the relative efficiency within the analysed sample of DMUs (Cvetkoska, 2010). Moreover, the DEA methodology is used for benchmarking and comparison of the relative efficiency of Decision-making units, by identifying the efficient DMUs that form the efficiency frontier and therefore,

the inefficiencies of the used inputs or outputs are measured concerning the efficiency frontier.

The limitations of this methodology are the “sensitivity to errors in the data and the fact that it evaluates relatively (by comparing DMUs only with the best in the observed set) and not absolutely” (Mihaljević Kosor i Abramović, 2019). DEA is nowadays extensively used in many industries and is widely applied by scholars, researchers, as well as analysts and managers.

Research approach

The research approach includes an extensive literature review that started with a survey of the most relevant scientific databases for this research (i.e. Scopus, Web of Science – SSCI and SCI papers and the Croatian Scientific Bibliography CROSBİ).

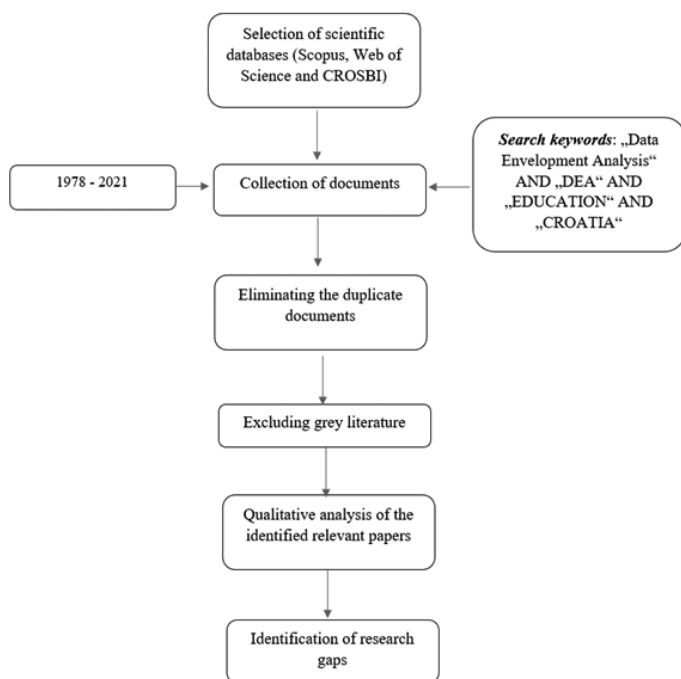


Figure 1. The research approach.
SOURCE: Author's creation.

The survey has been conducted with the keywords “DATA ENVELOPMENT ANALYSIS”, “EDUCATION” and “CROATIA” were used for the data collection. After a total of 41 hits (5 in Scopus, 23 on WoS and 13 on CROSBI), a manual evaluation of the relevance and a selection has been made with the criterion of paper relevance. This ultimately led to 8 articles that investigate the relative efficiency of Croatian tertiary education. The research approach and the steps that led to the analysis of 8 relevant published papers is shown in Figure 1.

Results: applications of data envelopment analysis in tertiary education in Croatia

Even though the efficiency of tertiary education has been empirically studied by a large number of papers, there are very few publications on a national Croatian level. The main goal of this paper was to survey, identify and present all of the relevant empirical papers that study the tertiary education efficiency in Croatia.

Therefore, in this paper, the author has explored three scientific databases: the Scopus, Web of Science (SSCI and SCI papers) and CROSBI (Croatian Scientific Bibliography) databases using the keywords “Data Envelopment Analysis” AND “Education” AND “Croatia”, in the search for empirical studies that evaluate the efficiency of tertiary education in Croatia. After a total of 41 hits (5 in Scopus, 23 on WoS and 13 on CROSBI), a manual survey and exclusion of grey literature and duplicate documents has been conducted (as shown in Figure 1). This led to 8 articles that investigate the relative efficiency of Croatian tertiary education.

A short tabular presentation of the DEA applications in tertiary education in Croatia is shown in Table 1, and a thorough analysis of their findings, used dataset and DEA models are elaborated thereafter.

Table 1. Applications of DEA in tertiary education in Croatia.

Author/s and year of publication	Paper	Time frame	Country
Obadić & Aristovnik (2011)	Relative efficiency of higher education in Croatia and Slovenia: an international comparison	1999 – 2007	37 OECD countries (focus on Croatia and Slovenia)
Arbula (2012)	Using Data Envelopment Analysis to evaluate the efficiency of higher education expenditure in Europe	2004 – 2008	23 European countries (including Croatia)
Aristovnik (2012)	The relative efficiency of education and R&D expenditures in the new EU member states	1999 – 2007	New EU member states (including Croatia)
Ahec Šonje, Deskar-Škrbić & Šonje (2018)	Efficiency of public expenditure on education: comparing Croatia with other NMS	2005 – 2013	New EU Member stated (including Croatia)
Nadoveza Jelić & Gardijan Kedžo (2018)	Efficiency vs effectiveness: an analysis of tertiary education across Europe	2004 – 2015	24 EU countries (including Croatia)
Mihaljević Kosor & Abramović (2019)	Measuring the relative efficiency of Croatian universities	2011./12. and 2016./17	Croatia
Malešević Perović & Mihaljević Kosor (2020)	The efficiency of universities in achieving sustainable development goals	2013 – 2017	25 European countries (including Croatia)
Arbula Blecich (2020)	Factors affecting relative efficiency of higher education institutions of economic orientation	academic year 2011 – 2012	Croatia, Slovenia and Bosnia and Herzegovina

SOURCE: Author's creation.

Obadić & Aristovnik (2011) have focused on the evaluation of the “relative efficiency of government spending on higher education in selected new EU member states (with special focus on Croatia and Slovenia) in comparison to selected 37 OECD countries”. In their study, they have developed two output-oriented BCC DEA models. They selected one input (expenditure per student, tertiary as a % of GDP per capita) and three outputs (school enrolment, tertiary in % gross, labor force with a tertiary

education in % of total and the unemployed with a tertiary education in % of total unemployment). Their findings indicate that there is a “significant inefficiency of higher education spending in Croatia and therefore the considerable potential to reduce government expenditure and/or to increase the higher education output/outcome”, whereas the higher education system in Slovenia is shown to have “a much higher level of efficiency compared to Croatia as well as many other comparable new EU member states and selected OECD countries”.

Arbula (2012) focuses on the efficiency evaluation of education expenditure in 23 European countries. In this study, an output-oriented BCC DEA model with one input (the expenditure per student, tertiary as % of GDP per capita) and two outputs (the population that has attained tertiary education and employment rates-tertiary education) has been employed. The observed period is from 2004 to 2008. The findings indicate that only four out of 23 countries are relative efficient and these are: Iceland, Norway, Slovak Republic and the United Kingdom, whereas Hungary is the least efficient in education expenditure. Moreover, Italy, Spain, France and Croatia have been identified as the least efficient countries (together with Hungary) in higher education expenditure. The results of this research show that “higher education expenditure is inefficient in the majority of the observed countries”. The author suggests increasing the outputs according to the existing input, as it could lead to future improvement in efficiency and their development.

Aristovnik (2012) focuses on the education expenditure efficiency and the R&D efficiency in 32 countries (which include EU-27, OECD and Croatia). In this study, the output-oriented BCC DEA methodology has been applied and its results indicate that “technical efficiency in education and the R&D (research and development) sectors differs significantly across the great majority of the EU (including new EU member states) and OECD countries”. Moreover, Slovenia could be considered “a good benchmark country in the field of tertiary education”. Interestingly, Cyprus and Hungary are most efficient in the field of R&D sector. The paper concludes that most new EU member states have shown relative high efficiency of tertiary education, but they “lag well behind in the R&D efficiency measures”.

Ahec Šonje, Deskar-Škrbić i Šonje (2018) examine the efficiency of public expenditure on secondary and tertiary education in the eleven New Member States (NMS) in EU, which includes Croatia (together with Estonia, Lithuania, Poland, Slovenia, Latvia, Romania, Czechia, Bulgaria, Slovakia and Hungary). The observed period is 2005-2013. They have implemented the input-oriented DEA with variable returns to scale (VRS) with public expenditure on education per student and as % of total education expenditure as inputs and the share of unemployed with a tertiary education and Shanghai ranking of leading national universities as outputs for the model testing the efficiency of tertiary education. Their findings reveal “high inefficiency of public spending on education in Croatia”, with the lowest efficiency score of 0.65. The Czech Republic, Latvia and Lithuania represent benchmarks and are the most efficient countries in tertiary education.

Nadoveza Jelić i Gardijan Kedžo (2018) have employed the DEA methodology to explore the tertiary education efficiency and effectiveness in 24 European Union countries in four sub-periods between 2004 and 2015 (i.e. 2004-2006, 2007-2009, 2010-2012, 2013-2015). Their DEA model considers and includes a broader set of inputs and outputs than previously published literature and it also includes quality indicators both on the side of the inputs and the outputs. Their paper highlights the importance of quality considerations regarding education and their findings indicate that “quality considerations affect the relative positions of countries regarding their efficiency scores”.

Mihaljević Kosor i Abramović (2019) have measured the efficiency of 75 higher education institutions in Croatia in two periods (namely in 2011./12. and 2016./17). They have employed the output-oriented BCC DEA model with five inputs (total number of enrolled students, the number of students who enrolled in the 1st year of college, total number of teachers, number of teachers with the title of Doctor of Science and number of teachers with a master’s degree) and one output (number of graduates). Their findings are rather concerning and indicate that “the relative efficiency of public higher education institutions in Croatia is low and only about 10% of institutions are fully efficient while the average efficiency of public higher education institutions is slightly higher than 50%”. The average efficiency of higher education institutions for 2011/12 is 49.70%, and 58.40% for 2016/17. The most efficient universities are the University in Zagreb and the University in Rijeka.

Malešević Perović i Mihaljević Kosor (2020) have employed the DEA methodology to investigate the efficiency of universities in Europe in achieving Sustainable Development Goals (SDGs). They have employed the “newly published University Impact Rankings that account for SDGs” in their study for the period from 2013 to 2017. They adopt a dual approach for their research, i.e. they analyse the macro and the micro-level (country- and university-level) of efficiency in tertiary education. In their macroeconomic model, they employ two input variables (government expenditures on tertiary education as a percentage of GDP and the number of teachers in tertiary education per capita) and one output variable (the overall score in University Impact Rankings and the score in achieving SDG17) for each country. Their results indicate that “at a macro level, only three to four countries in the sample are fully efficient”, meaning they could produce about 20% better score on University impact rankings without changing government tertiary expenditures on education, produce about 20% better score on University impact rankings. At a university level, “only about 16 percent of universities is efficient”.

Arbula Blecich (2020) has explored the factors that impact the relative efficiency of higher education institutions of economic orientation with an empirical analysis carried out on 31 higher educational institutions of economic orientation in Croatia, Slovenia and Bosnia and Herzegovina in the academic year 2011-2012. This empirical study has been laid out in three phases. In the first phase, four DEA models have been developed in order to evaluate the relative efficiency of the higher education institutions “in three main activities: teaching, research and international activity”, and a model for the overall activity. The second stage employs the cluster analysis, i.e. grouping the DMUs according to the achieved levels of relative efficiency in the area of teaching, research and international activity. In the last stage of the research, they employ logistic regression “to predict a probability of moving from one cluster to another in accordance with the change in the independent variable”. The findings from this study show that the probability for placing “in the more efficient cluster are higher in public institutions than in private ones, in institutions with more published professional papers, in those with higher expenditures per faculty, the larger number of enrolled students per faculty, as well as in those with more visiting researchers”. The proposed model could serve as a guideline for future empirical research, but also as a guideline for education policies.

There are many studies examining and focusing on the efficiency of education in the EU, which proves this is a relevant and contemporary subject. However, the research on the efficiency of education has been limited and this review paper is an attempt to bridge this literature gap.

Discussion and conclusion

The main goal of this paper was to survey, identify and present the relevant studies regarding Croatian tertiary education efficiency with the application of DEA. The other goal of this paper was to present the DEA as a mathematical programming methodology that is widely used to measure the relative efficiency of decision-making units and thus, to increase the interest of scholars to study and implement the DEA methodology more often in studies regarding the education industry as well as any other industry.

Only 1 of the total 8 surveyed papers focus on a single country (i.e. Croatia – Mihaljević Kosor i Abramović, 2019), whereas 7 studies are cross-country studies and include mostly EU countries.

Scholars Aristovnik, Mihaljević Kosor and Arbula Blecich are authors/co-authors of two of the surveyed papers on this subject.

Most of the surveyed papers (in particular, 6 out of 8) analyse the period after 2004. The shortest study is 1 academic year (Arbula Blecich, 2020), whereas the longest is 13 years – 2004-2015 (Nadoveza Jelić i Gardijan Kedžo, 2018).

In the final step of the study, as shown in Figure 1, the literature gap has been identified and it has revealed that papers and empirical studies regarding tertiary education efficiency in the SEE region are modest, papers and empirical studies regarding Croatian tertiary education with DEA are just a few, papers and empirical studies regarding tertiary education efficiency are mostly conducted for the EU countries (which is somewhat in line with the findings of Mihaljević Kosor i Abramović, 2019) and lastly, the application of DEA methodology in the evaluation of education efficiency has been thus far rather neglected by researchers.

This study is not without limitations. All the relevant and published empirical studies regarding the efficiency of higher education in Croatia have

been presented, to the best of the author's knowledge. There may be, however, papers and studies that have not been included in this review.

The scientific contribution of this review is threefold: first, it provides an in-depth extensive literature review on studies regarding efficiency of tertiary education in Croatia with the implementation of the non-parametric DEA methodology and focuses on 8 relevant studies; second, it introduces the DEA technique, its strengths and limitations; and finally, this article could represent a basis and an inspiration to future scholars in their future work and employment of DEA in education efficiency evaluation, and also in any other industry for that matter.

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UČINKOVITOST TERCIJARNOG OBRAZOVANJA U HRVATSKOJ: PREGLED APLIKACIJA AOMP

Sažetak

Zbog utjecaja na kvalitetu ljudskog kapitala, a time i na gospodarski rast zemlje, obrazovanje se smatra glavnim prioritetom i strateškim sektorom u svakom gospodarstvu. To je razlog zašto obrazovanje općenito javno financiraju vlade diljem svijeta. Stoga je potrebno dosljedno ocjenjivati i mjeriti učinkovitost tercijarnog obrazovanja.

Glavni cilj ovog članka je sagledati i prikazati sve objavljene studije koje istražuju učinkovitost tercijarnog obrazovanja u Republici Hrvatskoj uz primjenu neparametarske metodologije analiza omeđivanja podataka (AOMP). Štoviše, drugi ciljevi studije su istražiti korištene AOMP modele, odabrane ulazne i izlazne varijable kao i njihove rezultate i preporuke za buduće istraživače.

Metodologija korištena za ovo istraživanje je opsežan pregled literature empirijskih studija koje primjenjuju analizu omeđivanja podataka (AOMP – DEA) u evaluaciji učinkovitosti visokog obrazovanja u Hrvatskoj. Pristup istraživanja uključuje pregled najrelevantnijih znanstvenih baza za ovo istraživanje (tj. Scopus, Web of Science – SSCI i SCI radovi i Hrvatska znanstvena bibliografija CROSBI). Pojmovi “Analiza omeđivanje podataka”, “Obrazovanje” i “Hrvatska” korišteni su za prikupljanje podataka. Nakon ukupno 41 učitavanja (5 u Scopusu, 23 na WoS-u i 13 na CROSBI-u), napravljena je ručna procjena relevantnosti i odabir prema kriteriju relevantnosti rada. To je u konačnici dovelo do 8 članci koji istražuju relativnu učinkovitost hrvatskog tercijarnog obrazovanja, pa stoga ovaj članak predstavlja najrelevantnije objavljene radove o učinkovitosti hrvatskog visokog obrazovanja i njegovi su nalazi neprocjenjivi za visokoškolske ustanove, vladu, ali i akademske članove i zainteresirane javnosti.

Ključne riječi: analiza omeđivanja podataka, Hrvatska, obrazovanje, učinkovitost.

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THE HISTORY OF STUDENT RADIO BROADCASTING IN SLOVAKIA AS PART OF THE CULTURAL HERITAGE OF THE COUNTRY

Professional paper
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Abstract

Slovakia has a rich history of student radio broadcasting. Its origins date back to the 1970s, when radio studios were mainly located in university dormitories. Presenters who have worked or are working in the media environment nowadays in Slovakia have often emerged from these communities. The dormitory radio studios has enriched the culture of academic soil for decades and continues till today. This paper is dedicated to this important topic connected with education but also free time activities, within selected decades, the history of individual student radio studios in Slovakia and describes their activities. It is devoted to mapping of this sphere of culture and cultural heritage of student radio broadcasting in Slovakia. The paper is also based on the analysis of secondary sources and the available recollections of committed individuals, and therefore has particular value within the topic of student broadcasting in Slovakia, as it provides a comprehensive overview of the history of this part of the culture of the selected country.

Key words: radio, students, broadcasting, slovakia.

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The History of Student Broadcasting in Slovakia

Student broadcasting in Slovakia was slow to emerge, starting in the late 1970s. It is closely linked mainly to university dormitory life and volunteering. However, it had its heyday in the 1980s, when it can be assumed that every major university dormitory – student house in Slovakia had a student radio. In the past, small loudspeakers were placed on the walls of each dormitory room to announce important student announcements (this is still the case in some dormitories today). And it was this speaker network that was used by students who came up with the idea of playing music on them to make other students' time more enjoyable (at the time, television was just starting out and small portable radios were rare). *“All you had to do was turn the wheel on the booth, which wasn't missing in any of the rooms, and the fun could begin”* (*Inro – o nás a naša história*). Initially irregular musical blocks, the students began to add the spoken word. Precisely here, we can already speak of a simple radio broadcast. The so-called “IRŠ⁴”, the Dormitory Radio Studios, were born. Of course, there was no such thing as sound graphics or the production of journalistic genres for broadcasting at that time.

The students played the songs from records or tapes and occasionally entered with short spoken words. The listenership of the first dormitory radio studios was high in the early days, within the confines of the dormitory, as it was the first “competitive” media against the state-controlled mass media. *“Even in the pre-revolutionary era, student radio tried to promote freedom of expression through controversial humour and satire.”* (Polačková, 2019)

However, a form of self-censorship was also at work here; no student wanted to lose his place at university. It often happened that the playlist included songs that you wouldn't hear on state radio. The students were a part of the IRŠ because of the friendship, collective and the experiences they gained. They didn't get any money or grades in school for it. The “power” of the IRŠ was soon realised by the Communist Party. Through the SZM⁵, it initiated the creation of the so-called “Radio Centre”, a body linked to the editorial office, which produced an ideological programme

4 From Slovakian – IRŠ – Internátne rozhlasové štúdio.

5 Note: Abbreviation of Socialistický zväz mládeže or in English Soviet Youth Union.

distributed to all student radios. According to their basic idea, they were to broadcast for the inhabitants of student homes in all Slovak university cities. The archival documents mention the establishment of the Radio Centre as follows: *“The unionists count on IRŠ as a non-violent but impressive weapon of their ideological and educational influence on university students. In practice, this means a unified concept and close cooperation of student radio studios scattered all over Slovakia. Not an easy task indeed, but... In order to fulfil it, in November 1971 the Radio Studio of the Municipal Higher Education Council of the SZM in Bratislava was formed into the Radio Centre, a methodological advisor and coordinator of the activities of young “radio students”. Or rather a guide on how to inform and entertain, agitate and educate, how to do better and more interesting things today than yesterday”* (Garayová, 1980, 5-6).

Not all IRŠs had their own premises. Mostly in the early days of the IRŠ, broadcasts were made from dining rooms or even porters’ lodges, where there was access to connect to the so-called “booths” in the rooms. It was only later in the 1980s that the IRŠs began to move into premises converted for broadcasting purposes, within the dormitories, where they were given modern technical equipment at that time. The equipment came mostly from the decommissioned but still modern MONO equipment of the state radio, which was technically transitioning to STEREO broadcasting (*Vysielanie Rádio Slovensko, Nočná pyramída*, 2014). In addition to the usual strict names “IRŠ”, to which was usually added the name of the dormitory, gradually began to create original radio names such as INRO, TLIS, EVA, ŠTUDER, etc. At this time, almost all large dormitories and student homes across Slovakia had their own IRŠ. After the fall of communism, IRŠs often disappeared because the dual broadcasting system brought new, free professional radios (often staffed by former graduates from IRŠs). Also, music was more accessible on MC tapes. Dorms and schools didn’t have the money to upgrade outdated equipment.

However, student radios experienced their renaissance with the advent of the Internet. At the beginning of the millennium, new student radios gradually emerged. However, the word “IRŠ – Internátne Rozhlasové Štúdio” changed its meaning to “Internet Radio of Students” and the word “Radio” started to be used more and more. Some schools have revived their old radios others have emerged as brand new ones in young, newly founded universities. It must be said that the current times are greatly

favoring student radios. Broadcasting technology is much more accessible than it ever was. Even the so-called “booths” – speakers on the walls – are not needed for broadcasting today (many dormitories have removed them as part of renovations). All you need is a computer or a mobile phone. Thanks to the Internet, broadcasting today is not limited to the dormitory area, but can be listened almost anywhere. That is why today we can already talk about Student Radio, because the maturity and content of the broadcast (if the radio has a good organisation of work) is at a high level, comparable to small commercial or regional radio. Some radios were created as a response to spend their free time, others to provide students with a link between theory and practice within the field of mass media.

Student radios are mostly tied to their active students. Therefore, those that have sustained their activities for many years have also built up a good background and programme to pass on their experience. However, even though student broadcasting is about the students, there is always a need for the support of the university in order to be able to function in a dignified and representative manner. The university must support student radio financially. If both these ingredients work – generational exchange of students and support from the University, an university radio can broadcast continuously for many years.

More than 50 years have passed from the first on-campus radio studios to today’s online student radios, and many student radios have been created or disappeared. Although we have analyzed a large number of documents and reached out to several memoirists, new knowledge related to IRŠ continues to emerge. However, we can say with certainty that we have mapped almost all IRŠs operating in Slovakia. In the following timeline we will try to accurately characterize each radio according to their origin and we will also indicate the date of their demise or whether they are still broadcasting today:

Years 1960-1969

- **1967 IRŠ MG** – The student radio had its headquarters in the Mladá Garda dormitories in Bratislava. It started broadcasting on 22 August 1967 (*Rádio TLIS*). We can say that it was one of the first IRŠ in Slovakia. It is not possible to date its end exactly but

it was sometime at the beginning of the millennium. The end of the radio may have also come with the beginning of the big reconstruction of the dormitory, which started in 2003, where they no longer had to count on the possibility of radio broadcasting and removed the necessary cabling. (*The radio no longer exists today*).

- **1968 – IRŠ PU “Ičko”** (University of Prešov) – broadcast initially from the premises of the Student House and Canteen on the street of 17th November 13 (the so-called old dormitory). Later, the broadcasting was moved within the building to other premises, which are still used by the radio today. In 1993, IRŠ PU changed its name to PaF⁶ radio – Radio of Pedagogues and Philosophers. At the turn of the millennium, another change came in the form of digital broadcasting via computer. (Polačková, 2019) (*The radio is still broadcasting today*).
- **1968** – Around the same time in Central Slovakia, at the then University of Forestry and Woodworking in Zvolen (today the Technical University of Zvolen), the IRŠ INRO was founded (the name was created by combining the first syllables of the words: dormitory and radio⁷). It was established in the premises of the former showers on the 3rd floor, today the Old Boarding House of Ľudovít Štúr. At that time, the new radio studio also received new, modern technology. Initially, it was broadcast from “tapes” and LPs, later from cassette tapes, gradually CDs and mp3s came. Over time, the programmes and their content changed, but some of them have remained essentially the same, along with their names, to this day (*O nás, naša história*). (*The radio is still broadcasting today*).
- **1969 IRŠ MD-1** – After the construction of new dormitories in Mlynská dolina, a new IRŠ was added, hence its name MD – Mlynská dolina. The number was added to the name after the individual components of the radio studio were formally separated into MD-1 (the broadcasting studio), MD-2 (the music section) and MD-3 (the recording studio). The IRŠ was located in the dormitory of the Ľudovít Štúr School in Bratislava. In 1981, another,

6 From Slovakian – Rádio Pedagógov a Filozofov, in English Radio of Educators and Philosophers.

7 INRO – intertát, in English dormitory and rozhlas, in English radio.

new radio station, called TLIS, was split off from the radio station. The radio studio operated for 33 years until it closed in 2002 (*News*). (*The radio no longer exists today*).

- **1969** – The first IRŠ, Karavana, is established in Trnava. Although it belonged to STU Bratislava, it was broadcast in the dormitories in Trnava, where the university had a detached Faculty of Materials Technology. *“The beginnings of this radio have been traced thanks to former members, at least since 1969. What we know about the radio is that it went silent several times and then was revived again. However, the last time it was heard from was in 2016. Since then, the radio has not worked.”* (Harnusek, 2020). (*The radio no longer exists today*).

Years 1970-1979

We have not been able to date all of the IRS. Also from the stories of their former members we assume that at this time radios were created in the accommodation facilities of the Slovak University of Technology in Bratislava, such as the dormitory radio studio **“Šoltéska”** a now defunct dormitory, **“Suvorák”** – now the Dobrovičova dormitory, **“Nešporák”** – now the Svoradov dormitory, **“Rádio Eva”** – at the Nika Beloyanis dormitory. None of the mentioned IRŠs are functioning anymore and do not continue the tradition (MarTa, 2020). In Nitra, the IRŠ Pod Zoborom was established in the dormitory of the Pedagogical Institute, which disappeared in 2014 due to the creation of Rádio Plus, where the commercial sector and student broadcasting were merged.

In 1976 the Družba dormitory was put into use and comprehensively completed in 1981 (Grófová, 2016, 30). We can therefore assume that around this time IRŠ Družba, an amateur university radio at the Družba dormitory of Comenius University, also began broadcasting. Although they had no assigned frequency, their defining characteristic was the invented 13,13 MHz, which was nonsense, but it also appeared in their jingles (IRŠ Družba). The most famous show was *“Stand up, Please”*. Various famous Slovak personalities, stars and starlets of show business, or quickly fermented political leaders appeared in the show at regular intervals. The radio ceased broadcasting in 2003 (Ondrejka, 2007).

- **1971 – Establishment of the Radio Centre.** It was an activity of the Slovak Youth Union. Although it broadcast from the dormitory of the University of Economics, initially this organisation also brought together and methodically coordinated all the IRŠs that were in the four dormitories of Comenius University. The studio, had a Radio Centre at the Horský Park dormitory. They produced shows such as: ALL-ECO-FORUM, STUDIO UNIVERSITY, INTERVIEWS and DIALOGUES. Later, as part of the effort to unite all the IRŠs under the SZM organisation, the show STUDIO UNIVERSITY was distributed by mail on cassettes to all IRŠs all over Slovakia: *“once every two weeks, the show was reproduced on 15 cassette tapes and was broadcast not only in Trnava, Nitra and Martin, but also in Zvolen, Košice and Prešov.”* (Soukup, 1975, 8). We assume that the end for Radiocentre came after the coup, when it lost its justification, in 1989. *(The radio no longer exists today).*
- **1971 –** This year, a student radio station is also being established in the capital of the Eastern part of Slovakia, in Košice. The original IRŠ broadcast from the premises of the Božena Němcová dormitories. In 1985, the radio moved to new premises at dormitories Jedlíkova 9, where it is still located today. The change was not only spatial, but from that year onwards the name **ŠTUDER** was used (partly as an abbreviation of the student radio, but it was based on the fact that the radio had all the equipment of the STUDER brand). Radio “ŠTUDER” was at a high level also technically, thanks to the Radio Studio Košice, which provided the necessary equipment. The situation improved after 1989, when the period of censorship and pressure ended. In 1999 the name was changed again and the radio “ŠTUDER” became **“Rádio 9”**. The radio premises underwent a gradual renovation, which created a professional radio environment (Lučanská, 2016, 16). *(The radio is still broadcasting today).*
- **1972 –** From this year we obtained the first documented mention of the **IRŠ Bernolák**, which was established in the dormitory of Juraj Hronec at Bernolákova Street no. 1. The radio originally broadcast from the telephone exchange of the boarding school. Later, the students themselves built a new studio, which was

equipped with modern technology. Initially, they also cooperated with the MJF (small stage forms) theatre at the boarding school.⁸ The radio, like others, probably disappeared after the revolution in 1989.

- **1974** – In Žilina, at today’s University of Žilina, the **RAPEŠ** radio studio is established, which starts broadcasting in the student dormitory – ŠD Na hlinách. The first call was made on 18th February 1974. It was named after its founder, the Czech student Milan Pešava – Radio Pešava – RAPEŠ. Later on, Radio RAPEŠ had its own second circuit at another dormitory (the second independent radio under the name RAPEŠ, which broadcast in student dormitory – ŠD Veľký diel in Žilina since 1987). Its studios have undergone several reconstructions. (*The radio is still broadcasting today*).
- **1975** – From this year comes the first mention of radios, for which we did not get further information. These IRŠ, however, from the context of the quoted article, were certainly operating before 1975. These include: the IRŠ at the student dorms – ŠD of the Jessenius Medical Faculty in Martin, at the ŠD of Lafranconi, at the ŠD of Suvorovova (now Dobrovičova) (Soukup, 1975, 8).
- **1977** – **IRŠ Mladosť** began its regular broadcasts as early as 1977. With music and the spoken word, it made the evenings of the residents of the student residences more pleasant. IRŠ Mladosť was a radio studio at the SPU Youth dormitory in Nitra. “*The radio also ceased to exist due to lack of interest from students and the school in 2017.*” (Siman, 2020). (*The radio no longer exists today*).

Years 1980-1989

- **1981** – In that year, exactly on 1st September, 1981, a new radio station was split off from MD-1 Rádio and broadcast at the Mladosť dormitory under the name **TLIS**. As the radio operated in Mlynská dolina, the largest dormitory town in Slovakia, the name simply means “*Thousand Bed Dormitory Building*”.⁹ By

8 Note: Club of the All-School Committee of the SZM SVŠT. 1972, J. Hroncu Dormitory, Bratislava.

9 Note of the authors: From Slovakian – Tisíc lôžková internátna stavba – TLIS.

broadcasting banned Western music and presenting a relaxed culture, the young radio quickly found supporters among the students and, conversely, enemies on the side of the incumbent communist regime. With the advent of new technologies, however, TLIS switched to Internet technology in 2000 and began streaming its broadcasts on the Internet. From TLIS came the people who were involved in the creation of Fun Rádio, Rádio Ragtime, Rádio Expres and Rádio Twist. Others have had successful careers as presenters and announcers. In addition, one of the first independent alternative music labels in the then Czechoslovakia, Zoon Records, was based in the premises of TLIS in 1991-1993 (*Rádio TLIS*). (*The radio is still broadcasting today*).

- **1989 – Rádio Univerzita** was created at the opening of the new dormitory on Medická Street. Several alumni who were no longer studying came up with the idea to create a radio for students. They bought the equipment with their own money and operated under the banner of the dormitory. In 2000, however, there were several conflicts between the management of the dormitory and the members of the radio due to non-compliance with the accommodation regulations. As a result of the fact that the radio members were no longer students, they were banned from continuing by the dormitory management. There remained a long 5 year silence because the original owners of the equipment were stubborn and did not want to sell it to the school. Later there was even a cleaners warehouse on the radio area. In 2004, there were new students who came up with the idea to rebuild the radio. The boarding school bought them new equipment and this time the radio really belonged to the school. The new radio ŠtuRKO was created (Kolárová, 2020). (*The radio no longer exists today*).

Years 1990-1999

- **1990** – It is also worth mentioning **Fun rádio**, which is not a typical student radio, but it was born by people working in the IRŠ and academic environment. ‘Funko’ was created as a small post-communist miracle. It was born by students, people like

Zuzana Mistríková, one of the leaders of the student movement, and her French teacher at the time, Milan Králik, who is still working in the radio today. Thanks to contacts at the French Embassy and great enthusiasm, the radio was able to start broadcasting shortly after the Velvet Revolution. It first came on the air on 10 June 1990 and the first voices belonged to students Dáša Čuríková and Ludovít Jakubove, alias Mravec. In the early days, Fun rádio could only be listened to in Bratislava and parts of western Slovakia from the 94,3 MHz frequency. Most of the day, the airwaves were in French. Only four hours a day were broadcast from Bratislava. Gradually, however, the proportion of Slovak on the air rose. In 1994, Fun rádio extended its coverage to Banská Bystrica (104,0 MHz) and Košice (102,9 MHz). Three years later, 'Funko' acquired the 99,2 MHz frequencies at Križava for northern Slovakia and 87,7 MHz from Dubník for eastern Slovakia (*Fun Rádio – priekopník súkromného vysielania na Slovensku*). (*The radio is still broadcasting today*).

Years 2000-2009

- **2006** – Radio **ŠtuRKO** starts its broadcasting. It is a student radio operating at the Pavol Jozef Šafárik University in Košice, which was founded on the basis of Rádio Univerzita. It has been broadcasting in its current form since 2006. The broadcasting and recording studio is located in the university dormitories at Medická 6. ŠtuRKO's mission is to develop the linguistic, communication, technical and creative skills of the university students and has already educated the most energetic professional. There are currently 22 members of the radio, but this number changes frequently, as Student Rádio Košice organises a casting at the beginning of each semester. It is open to students from all faculties, regardless of their major (*Študentský rozhlas Košice (ŠtuRKO)*). (*The radio is still broadcasting today*).

Years 2010-2019

- **2010** – The creation of the new student radio in Žilina is related to the IRŠ RAPEŠ. In 2009, IRŠ RAPEŠ Veľký diel separated from IRŠ RAPEŠ Hliny and started to perform under the new brand **Rádio X**. The official launch of Rádio X was on 5th October 2010. Rádio X is a dormitory radio studio (IRŠ), it is a medium operating on the premises of the University of Žilina in Žilina, located in the Veľký diel dormitories, in the basement of Block E. In the first year of its operation, Rádio X has grown to a total of eight broadcasting circuits. In addition to the main broadcasting circuit, there are also 7 genre-oriented circuits: Dance X, Alternative X, Metal X, DNB X, Chillout, Folklore X and Oldies X (*O rádiu X*). (*The radio is still broadcasting today*).
- **2011 – PULZ rádio** is a radio studio of the Catholic University in Ružomberok, which is an independent, non-political, voluntary, non-profit and informational-cultural facility of the University, contributing through its activities to the information and satisfaction of the cultural needs of its students.¹⁰ The radio is housed in a modern library building. For almost 10 years it had a period when it was not broadcasting but now it is coming back to life. It is mainly staffed by students from the Department of Journalism. (*The radio is still broadcasting today*).
- **2011** – At the Faculty of Mass Media Communication of the University of Ss. Cyril and Methodius in Trnava, a new student radio, **Rádio Aetter**, is being created. The project is unique in that it was founded by the students themselves. The school supported this idea and came out to meet us with everything. And so, on 28th February 2011, another student internet radio was launched. The radio now has two fully digital studios and a sophisticated broadcasting technology system. The advantage is that it operates at the Faculty of Mass Media, where students come who are also interested in real, outside school work in the media and therefore encounter theoretical knowledge at school, which they can later apply, for example, in radio broadcasting. In 2019, the radio

¹⁰ Pulz Rádio. URL: <http://pulzradio.ku.sk> <https://aetter.sk/o-nas/> [accessed: 27th May 20220]

acquired its own frequency 107,2 FM for the city of Trnava and the surrounding area.¹¹ (*The radio is still broadcasting today*).

- **2014** – University **Rádio Plus** is a part of the Media Centre of the Faculty of Arts, University of Constantine the Philosopher in Nitra. It has been broadcasting since 1st July 2014 on 105,9 FM frequency in addition to the Internet and its preparation is mainly done by students of journalism, marketing communication, but also other fields of study under the guidance of teachers and people from practice. The project has been developed with significant private sector assistance and applies systems that are used in most opinion-forming media, including public service media. Rádio Plus is the first local radio station for Nitra with a regional outreach that focuses on the city and provides its listeners with mainly up-to-date information.¹² It was not purely student radio. It was a mix of private business with the possibility of gaining work experience for students on a contract basis. (*The radio stopped broadcasting in 2021* (Cunevová, 2021)).
- **2014** – **Rádio Like** was the radio of the Pan-European College. It didn't work like a regular student radio on the online stream, but it prepared its broadcasts in a block, today we could define it – in the form of a podcast. Here again it was showed how fragile student radios can be in relation to enthusiastic students. The radio produced its programme for only 3 academic years (MediaHub, 2016). The last broadcast was available on 16th June 2017. Since that date, no further transmissions have been received. (*The radio no longer exists*).
- **2015** – Student **Rádio TrenchTown** was an internet student radio of the University of Trenčín. It was active on the campus of the university only for a very short time from 5th May 2015 until the end of the academic year 2018. It was an independent medium that contributed to the information and education function, mainly for students and staff during the winter and summer semesters of the academic year. The members of the student radio

11 Rádio Aetter. O nás. URL: <https://aetter.sk/o-nas/> <https://aetter.sk/o-nas/> [accessed: 29th May 2022]

12 Note of the authors: The original page of the Rádio Plus has changed. URL: <http://www.radioplus.sk> [accessed: 7th May 2020]

could be students of the University of Trenčín Alexander Dubček, who could develop their personal and professional growth prerequisites through their activity in the radio and provide the preparation and moderation of the programmes, the technical aspect of the broadcast itself and the music dramaturgy (*Radio, TN UNI*). Even though the radio is no longer broadcasting today it had a quality studio, which may in time attract new enthusiasts and revive its broadcasts again. (*The radio no longer exists today*).

Summary of Student Radios

The search for all, especially the defunct IRŠ radios, has been difficult. Much of the material has not survived. Nevertheless, mainly by contacting former members, we have also compiled a table of all the IRŠs we have found. In the table we can find, besides the name, the location of the IRŠ, under which university it belonged and also its current state of activity.

Figure 1. Timeline of the emergence of student radios.

NAME OF IRŠ	HEADQUARTERS	UNIVERSITY	STATUS
BRATISLAVA			
Družba	Student dormitory – ŠD Družba, Bratislava	Comenius University in Bratislava	<i>Not broadcasting</i>
IRŠ MD-1	Student dormitory – ŠD Mlynská dolina, Bratislava	Comenius University in Bratislava	<i>Not broadcasting</i>
Lafranconi	Student dormitory – ŠD Lafranconi, Bratislava	Comenius University in Bratislava	<i>Not broadcasting</i>
TLIS	Student dormitory – ŠD Mladost', Blok B4, Staré Grunty 53, Bratislava	Slovak University of Technology in Bratislava	<i>Broadcasts online</i>
Bernolák	Student dormitory – ŠD Juraja Hronca, na Bernolákovej ulici 1, Bratislava	Slovak University of Technology in Bratislava	<i>Not broadcasting</i>
MG	Dormitory – Internát Mladá Garda, Bratislava	Slovak University of Technology in Bratislava	<i>Not broadcasting</i>

Suvorovova	Student dormitory – ŠD Dobrovičova, Bratislava	Slovak University of Technology in Bratislava	<i>Not broadcasting</i>
Nešporák	Today Student dormitory – ŠD Svoradov, Bratislava	Slovak University of Technology in Bratislava	<i>Not broadcasting</i>
Šoltéska	Student dormitory – ŠD na Šoltésovej ulici (does not exist anymore)	Slovak University of Technology in Bratislava	<i>Not broadcasting</i>
Rádio Eva	Student dormitory – ŠD Nikosa Belojanisa, Bratislava	Slovak University of Technology in Bratislava	<i>Not broadcasting</i>
Rádiocentrum	Student dormitory – ŠD Horský park, Bratislava	University of Economics in Bratislava	<i>Not broadcasting</i>
Rádio Like	Building of the faculty – Tomášikova 150, Bratislava	Pan-European College in Bratislava	<i>Not broadcasting</i>
TRNAVA			
Rádio Aetter	Building of the faculty – Skladová 4, Trnava	Faculty of Mass Media Communication, University of Ss. Cyril and Methodius in Trnava	<i>Broadcasts online and on the frequency 107,2 FM for the city of Trnava and the surrounding area</i>
Karavana	Student dormitory – ŠD Milana Uhra, Jána Bottu 7455, Trnava	Slovak University of Technology in Bratislava, Faculty of Materials and Technology	<i>Not broadcasting</i>
NITRA			
Rádio Plus	Boženy Slančíkovej 1, Nitra	University of Constantine the Philosopher in Nitra	<i>Not broadcasting</i>
Pod Zoborom	Student dormitory – ŠD Zobor, Nitra	University of Constantine the Philosopher in Nitra	<i>Not broadcasting</i>
Mladost'	Student dormitory – ŠD Mladost', Štúrova ulica 3, room no. 503, Nitra	Slovak University of Agriculture in Nitra	<i>Not broadcasting</i>
TRENČÍN			
TrenchTown	Building of the university – Študentská 2, Trenčín	Trenčín Alexander Dubček University in Trenčín	<i>Not broadcasting</i>
MARTIN			
IRŠ Lekárov	Student dormitory – ŠD Jesseniovej lekárskej fakulty, Martin	Comenius University in Bratislava	<i>Not broadcasting</i>

ZVOLEN			
INRO	Old dormitory – Ľudovíta Štúra, Block C, 3rd floor, Zvolen	Technical University of Zvolen	<i>Broadcasts online</i>
ŽILINA			
Rapeš	Dormitories Na Hlinách, Block X, Hlinská street, Žilina	University of Žilina in Žilina	<i>Broadcasts online and on campus</i>
Rádio X	Dormitories Veľký Diel, basement, Block E, Vysokoškolákov 20, Žilina	University of Žilina in Žilina	<i>Broadcasts online and on campus</i>
RUŽOMBEROK			
PULZ rádio	Library of Catholic University, Faculty of Arts, Hrabovská cesta 1, Ružomberok	Catholic University of Ružomberok	<i>Broadcasts online</i>
PREŠOV			
Ičko (PaF)	Student dormitory – ŠD on the street 17th November, Prešov	University of Prešov in Prešov	<i>Broadcasts online and on campus</i>
KOŠICE			
Rádio Univerzita	Student dormitory – ŠD Medická 6, Medická 6, Košice	Pavol Jozef Šafárik University in Košice	<i>Not broadcasting</i>
ŠtuRko	Student dormitory – ŠD Medická 6, Blok B, door no. 48, Medická 6, Košice	Pavol Jozef Šafárik University in Košice	<i>Broadcasts online and on campus</i>
Rádio 9	Student dormitory – ŠD Jedlíková 9, Block A, Košice	Technical University of Košice	<i>Broadcasts online and on campus</i>

Source: own processing, 2021.

Currently (in 2022), only 9 student radios are active. Although Bratislava was initially the main centre of the IRŠs and still has the largest number of dormitories and students, today only one student radio – TLIS – broadcasts from Bratislava. The strong cities with student radios are currently Žilina (2 radios) and Košice (2 radios). In addition, there are also radio stations in Prešov, Ružomberok, Trnava and Zvolen. The students who

create content in the student radios meet at least once a year at a show and competition of university radios, *Rádio Rallye*.

Student Radio Competition

In the 1980s, with the rapid development of non-professional art and amateur radio, the Outreach Institute also took over the care of disc jockeys and phonographers (so-called sound hunters) and became the organizer of the nationwide competitions Diskorama, Štúdiorama and Fonorallye, which gradually became the *Amateur Sound Recording Competition (Noc tvorivosti)*. The contest ended in the 1990s after the massive demise of student radio.

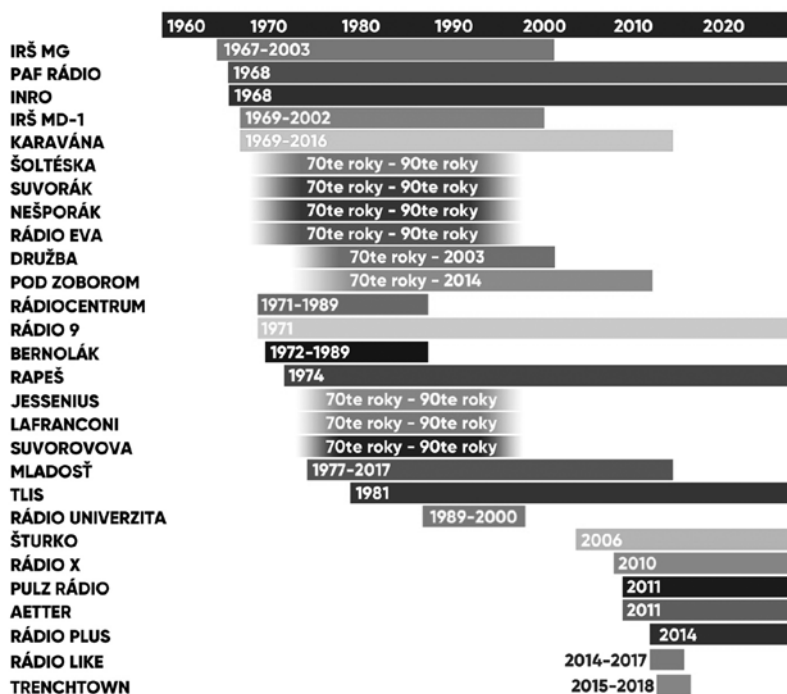


Image 1. Timeline of the emergence of student radios.

Source: own processing, 2021.

In 2005 it was revived. Luboš Kasala¹³ got the idea to revive the competition of IRŠ. He found some radios on the Internet, phoned others and they met in Žilina, where they said they were going to organize a competition, which was named *Rádiorallye*¹⁴. The first edition of this contest was hosted by Rádio 9 from Košice. Every year the contest is organized by a different radio. The *Rádiorallye* competition thus followed the former nationwide meetings of residential radios under the name Amateur Sound Recording, which in the eighties and nineties were organised by the former Slovak Audiovisual Club under the auspices of the *National Enlightenment Centre and the Slovak Radio in Bratislava* (Jurčo, 2014, 31).

Conclusion

Student radio is mainly about education and students should try everything in it to know what their strengths and weaknesses are. Every student radio should try to give sufficient feedback to the student. A student is best improved by his own practice, in practical activities he or she acquires and improves his or her skills. The technical side of the student radio studio also plays an important role in the learning process. Every student radio should work with modern technology, which students may also come into contact with in commercial or public service radio. Nowadays, the working model or the position of presenter = technician is preferred in radios. In the past, a technician was also present in the studio to mix the music and other musical components in the broadcasting. The presenter just read the pre-prepared text for the broadcast. Today, however, these functions have been merged into one and the presenter is also the technician. Such demands of the practice thus place higher demands on the presenter and on his or her ability to multitask, as he or she has to deal with the mixing desk, music and sound in parallel, in addition to reading the text. Even in today's university system, it is a good idea to build student radio stations that act as a community medium in the environment in which they exist and also serve as a means of improving students' preparedness for the demands of practice. Student broadcasting has had its own character,

13 Note: Luboš Kasala was a former member of IRŠ Rapeš.

14 Note of the authors: In 2017, 150 radio amateurs participated in the contest, with 198 contest entries and 10 hours of radio production.

characteristics and significance since the 1950s, since when it has formed the colour of radio broadcasting in Slovakia and the experience has been passed on to generations of students, and for this reason in particular it is part of the national cultural heritage. A strong generation of student radio presenters remains in the media space in Slovakia to this day. In 1987, Slovak presenter Julo Viršík started broadcasting in IRŠ Mlynská dolina. He remembered that period as that there were more student radios in those times. There was a large group of people coming together from that period when he was doing it and who are still working in radio today or have left a significant mark on it (Hudec, 2021). Although the dormitory radio studios focused primarily on radio production and broadcasting, their public activities within the framework of university life in the student house took other forms over time, which eventually resulted in inherent traditions. One of these was the sounding of various public events on the campus (Sámelová, 2019, 61). Student radio broadcasting both educates and provides for future generations of media and radio workers who are the bearers of the idea and culture of words, music or traditions. It is proof that students also have the opportunity to activate and realize themselves in leisure activities that are linked to the cultivation of their generation. And this is the reason why we can consider the Dormitory Radio Studios as part of the national cultural heritage.

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POVIJEST STUDENTSKOG RADIJA U SLOVAČKOJ KAO DIJELA KULTURNE BAŠTINE ZEMLJE

Sažetak

Slovačka ima bogatu povijest studentskog radijskog emitiranja. Njegovi počeci sežu u sedamdesete godine prošlog stoljeća, kada su radijski studiji uglavnom bili smješteni u sveučilišnim studentskim domovima. Predstavnici koji su radili ili rade u današnjem medijskom okruženju u Slovačkoj često su proizašli iz tih zajednica. Radijski studiji studentskih domova desetljećima su obogaćivali kulturu akademskog tla i nastavljaju do danas. Ovaj rad posvećen je važnoj temi kao što je ova vezanoj uz obrazovanje, ali i slobodno vrijeme aktivnosti, unutar odabраниh desetljeća, povijest pojedinih studentskih radijskih studija u Slovačkoj i opisuje njihove aktivnosti. Rad se temelji i na analizi sekundarnih izvora i dostupnih sjećanja na posvećenih pojedinaca, te stoga ima posebnu vrijednost u okviru teme studentskog emitiranja u Slovačkoj, budući da pruža sveobuhvatan pregled povijesti ovog dijela kulture odabrane zemlje.

Ključne riječi: emitiranje, radio, Slovačka, studenti

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LANGUAGE ANALYSIS OF THE POLITICAL DISCOURSE ON THE EXAMPLE OF MEDIA COVERAGE OF THE CORONAVIRUS

Scientific Paper
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Abstract

Digital media and means of mass communication play an essential role in disseminating information. Studies (Vozab and Peruško, 2021) have shown that the pandemic merely accelerated the apparent shift towards digital news sources. In the 21st century, the internet has become the primary source of information, used by persons of various age groups (Benzinović, Dabo and Šimić, 2021). Authors also point out that the media influence the formation of the public opinion (Jurčić, 2017), especially on topics that their audience knows little or nothing about (Klapper, 1974, as cited in Kovačević, 2020, 5). Chomsky (2002) goes as far as to claim that the media participate in the control and surveillance of the masses. Other authors have argued that the media wield tremendous power in crisis situations, given their ability to filter information and shape opinions on certain problems and their solutions, which can reinforce existing prejudice (Nelkin, 1987, as cited in Kovačević, 2020, 5-6). The coronavirus pandemic provided a perfect breeding ground for fearmongering and dissemination of false and sensationalist news and spins, which are given unmerited space in the media landscape even in normal circumstances. Since the ability to recognise fake news and think critically is one of the prerequisites for responsible internet use, the question is if a person can tell the difference between truth and lie when faced with a deluge of conflicting information about COVID-19 – how infection occurs, how the disease spreads, how we protect ourselves from it, and how it is treated – that are disseminated by a variety of authoritative voices, even if this person has good critical thinking skills.

This paper seeks to analyse the language contained in web portal articles about the epidemic that championed opposing views, and examine how this content influenced

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the formation of the public opinion. For this purpose, the authors analysed articles published on the highest-readership Croatian web portals and on official coronavirus information websites that contained the following keywords: coronavirus, vaccine, COVID certificate, recovery, pregnancy, symptoms, cases, children. Analysis results have shown that the articles overflow with unclear, illogical, incomplete or contradictory information, and use linguistic devices that exhibit the characteristics of political discourse.

Keywords: epidemic, language analysis, coronavirus, media, political discourse

Introduction

The media's primary objective is to communicate information to the general public (Jurčić, 2017). They have multiple roles: the media present worldviews, raise general awareness among the citizens, and frame problems in realistic and visible contexts (Rus-Mol and Zagorac-Keršer, 2005), but also often become communicators of culture, or serve educational or entertainment purposes. They serve the functions of selection and interpretation, which help build cohesion in the community, and the function of explanation, which serves to build and maintain the collective awareness (Martinić, 1994). As means of mass communication, digital media have an essential role in disseminating information in the contemporary world. In the 21st century, the internet has become the primary source of information, used by persons of various age groups (Benzinović, Dabo and Šimić, 2021). From this perspective, given their potential considerable impact on the formation of the public opinion on a large scale, web portals have a great responsibility (Jurčić, 2017). Assuming that the information disseminated online is timely and accurate, the speed of their dissemination to the farthest corners of the globe can help spread knowledge, and directly or indirectly improve living conditions in virtually all aspects. However, in addition to being a very useful source of information, web portals have also become an inexhaustible source of unchecked, half-true or outright false information, as well as sensationalist news and spins. This is largely due to their democratic nature, which allows almost anyone to post any information without checking it first. Fake news and spins are sometimes used harmlessly to increase readership, but they also often play an unethical part in the control and surveillance of the masses (Chomsky, 2002). For this reason, it is extremely important to raise awareness

of media literacy, not only among young people, but in all age groups, especially as regards the analysis and critical evaluation of the media content. Authors also maintain that the media have particularly profound influence on the formation of the public opinion (Jurčić, 2017) about topics that their audience knows little or nothing about (Klapper, 1974, as cited in Kovačević, 2020, 5). What is more, the media have a tremendous power in such circumstances, given their ability to filter information and shape opinions on certain problems and their solutions, which can reinforce existing prejudice (Nelkin, 1987, as cited in Kovačević, 2020, 5-6). In this context, the pandemic caused by the SARS-CoV2 virus provided an excellent breeding ground for fearmongering and the dissemination of fake and sensational news, which are given unmerited space in the media landscape even in normal circumstances. At the height of the pandemic, the media overflowed with information on how the infection occurs, how the disease spreads, what can we do to protect ourselves from it, and how it is treated. In circumstances of social distancing, the media played a key role in raising awareness among the citizens, and shaping their opinions about the matter. By definition, crises evoke the feelings of fear, stress and panic (Bulajić, 2010). In crisis circumstances, competent communication dialogue should be the principle underpinning effective crisis management (Barović, 2011) in order to soothe the feelings of uncertainty and insecurity. In hindsight, it is questionable to what extent the dialogue present in articles published at the height of the pandemic crisis in Croatia really aimed to soothe the panic, and to what extent they fuelled fear and doubt. The sense of insecurity, and then doubt, largely resulted from the fact that the members of the Croatian Government's Science Council and National Civil Protection Headquarters, along with epidemiologists, scientists and doctors, presented contradictory information about the virus, and ways to prevent its spreading, on a daily basis, losing the citizens' trust over time. This was partly due to some of the decisions that had been made (for instance, violation of the mandates during the elections and the summer season), and partly to the methods of communication that were used, and the dialogues conducted in the media and through the media. The appearance of the vaccine in the market seems to have marked a turning point. Incomplete and unclear information about the vaccine communicated to the citizens by healthcare professionals aggravated their mistrust in the vaccine, the Headquarters, and the Minister of Health. Following the

same pattern of behaviour, the web portals posted news supporting their own positions, depending on the personal opinions of their journalists, or the positions of the media outlet. The media (and the population in general) seem to have split into two groups: a) the first group emphasised the dangers of the disease and the severe consequences suffered by those who became infected (often including death), and unconditionally promoted the vaccination of all citizens; and b) the second group trivialised the disease and its consequences, and unconditionally opposed vaccination. In such an atmosphere, it was particularly difficult to tell the difference between truthful information and disinformation, even for people who have good critical thinking skills, and who are in the habit of checking the credibility of news. This was probably why the citizens lost some more of their already shaken trust in the media, as evidenced by Reuters' survey on the use of news in the digital media environment. In this survey, 55% out of the total of 2000 Croatian participants said that they found it difficult to tell the difference between true and false information on the internet in 2020. In 2021, the percentage rose to as high as 61.1% (Vozab and Peruško, 2021, 28). Politicians were ranked as the leading source of disinformation by the survey participants (55%), and journalists and their organisations were named as sources of disinformation by as many as 19.9% Croatian participants (Vozab and Peruško, 2021, 29). Since this survey took place during the coronavirus pandemic, we may assume that this result was greatly impacted by the reporting style and treatment of the topic (the first case of the novel coronavirus in Croatia was officially diagnosed and confirmed on 25 February 2020).

The media, communication and manipulation

It is very difficult to give a precise definition of communication, especially because there are so many possible perspectives: communicology, language, philosophy, sociology, psychology etc. In the broadest sense, communication is an exchange of experiences, and the process of creating a meaning between two or more people (Tubbs, Moss and Papastefanou, 2011, 7-8), or the transmission of information from the sender to the recipient (enciklopedija.hr: Komunikacija). Communication comes in different forms: interpersonal, intercultural, public, mass communication, and others (Tubbs, Moss and Papastefanou, 2011, 16). This paper will focus on

media communication, with particular emphasis on web portals. In order for communication to be successful, the meaning conceived by the sender when transmitting the information must not change at the moment when it reaches the recipient. Communication on web portals is specific because it flows in one direction: there is one sender, and many recipients. The reporter (journalist) presents the information, and the recipients receive it, but they do not have the opportunity to ask additional questions if they have not fully understood the text, or if they find anything unclear. They do have the option of commenting on the articles, but comments are for the most part reduced to a discussion between the recipients, without an opportunity to receive a reply from the message sender. The lack of non-verbal communication, which has a key role in exchanging information, in the interaction between the sender and the recipient is another problem in media coverage on web portals. Communication with the readers largely relies on language, photos and layouts, and such unidirectional transmission of information can lead to misunderstandings and misinterpretations in some circumstances. As a system of signs, language is indeed the most important means of human communication and, in the context of successful exchange of information and receipt of messages, the most important way to materialize meaning. However, according to the basic postulates of cognitive linguistics, “language structures reflect the external world and a person’s experience thereof” (Tuđman Vuković, 2009). Meaning is primarily materialized in a context, and is derived from the process of conceptualization of an individual’s bodily experience, and from the perspective that the situation is observed from. By extension, the meaning of language structures is not universal and the same for everyone: it largely depends on the individual’s conceptual system, and the cognitive processes occurring in the individual’s mind (Tuđman Vuković, 2009). For this reason, different readers often interpret the same text differently. If a text is written clearly and unambiguously, and no unclear, incomplete or ambiguous syntagms are used, the differences in interpretation will be minimal. However, if the information contained in the news is in itself incomplete, and the news abounds in ambiguous statements and metaphoric phrases, it is likely that different readers will interpret it very differently. On the other hand, the use of certain linguistic elements and constructs in a certain context and in a certain way can provoke unambiguous reactions and sentiments in message recipients. Such linguistic patterns are, for instance,

largely used when designing advertisements whose purpose is to induce the consumer to buy the advertised product. These are just some of the examples confirming the effect of the senders' linguistic prowess on the success of the communication and the receipt of the message. Of course, linguists have for long been aware of the multiple functions¹⁷ of language in human life, extending far beyond the pure need for communication in the sense of conveying a textual message. Fairclough (1989, 1) even emphasises that the modern society lacks awareness of how much language can contribute to the domination of one person over another, and believes that the impact of language on creating, maintaining and changing social relations of power is underestimated. Authors who engage in critical analysis of discourse also underline that language is a means of expression, but can also be a means of creating social inequalities” (Vuković, 2014, 97). A critical analysis of discourse, among other things, identifies the mechanisms by which language is used as a means of discrimination and abuse of power in certain situations (van Dijk, 2006, 375). Such language mechanisms that serve deceptive and manipulative purposes can be used so subtly that the persuasion may even seem “perfectly acceptable and natural to both sides”, the manipulator as well as the manipulated (Vuković, 2014, 101). A score of papers discuss language manipulation in media communication, which often flies below the recipients' radar, and draw attention to the power of persuasion based on cognitive control (van Dijk, 2001, 355; 1985, 254). Such manipulative linguistic techniques are particularly abundant in politics – in the so-called political discourse. Studies of the political discourse have pointed to ample use of various linguistic manipulation and persuasion mechanisms (van Dijk, 2005, 2006, 2012; Sivrić and Mihaljević, 2010; Podboj, 2011; Vuković, 2014a, 2014b). Seeking to influence the opinions of others, and persuade them to accept their own views (Halimi, Belušić and Ogresta, 2004), politicians often use “sub-

17 In the mid-20th century, Jakobson formulated his well-known theory of the six functions of language: 1) *emotive* or *expressive* function (directed at the sender, directly expressing the speaker's opinion about the topic; exclamations represent the purely emotional layer); 2) *conative* function (imperative function, directed at the recipient, most obvious in the use of the vocative case and the imperative mode); 3) *referential* or *denotative* or *cognitive* function (directed at the context; forms the basis for any communication by defining the relationship between the message and the subject; third person speech); 4) *phatic* function, directed at contact (messages that are used to establish, prolong or stop contact); 5) *metalingual* function (refers to the language code; language that is used to describe language); and 6) *poetic* function, directed at the message as such (Jakobson, 1966, 293-294).

tle forms of abuse of social power, where language is the main means of establishing domination over others” (Vuković, 2014a, 97). In the process, they often emphasise their own power and superiority by finding ways to discredit anyone who does not share their views, describing in detail the “facts” that support their argument (van Dijk, 2006, 379).

Language manipulation in the political discourse and coronavirus discourse

The political discourse is primarily ideological (van Dijk, 2003, 208), and its main function is to persuade. Language, and how it is used, is the crucial element in the process of persuasion and of shaping ideology into opinions. Persuasion does not necessarily have negative connotations (van Dijk, 2005). In principle, persuasion is neutral by nature, its primary task being to influence the audience’s judgment and actions without coercion. The primary objective of manipulation, on the other hand, is to gain control over the recipient of the message (Ejupi, Arburim and Siljanovska, 2014). However, persuasion and manipulation are intermixed and interwoven in politics, making it difficult to draw a clear line between the two actions at times, and leading to frequent abuse of the substantial manipulative power of language. Polarisation is one of the most important manipulation strategies in the political discourse, its primary purpose being to portray oneself and other like-minded individuals in a positive light, and to portray others (who do not subscribe to the same views) in a negative light. This is achieved by accentuating the positive and downplaying the negative facts about oneself, and, vice versa, accentuating negative facts about others (van Dijk, 2006, 373). Politicians often also resort to over-emphasising the topic they wish to discuss, while ignoring or downplaying the topic they wish to avoid discussing. In their discourse, it is important to underline and punctuate the importance of their own merits, but also to deny responsibility when necessary (Vuković, 2014b, 237; van Dijk, 2012, 34-64). Van Dijk (2012, 34) argues that language manipulation strategies in general are used at almost all discourse levels: lexical, grammatical, and pragmatical, and the political discourse is no exception. The means of manipulation at the lexical level include imprecise words, words with a marked meaning that inspire strong emotional tones (extremely positive or negative), empty words that are used so often in the language

of politics that they have lost all meaning, and professional jargon (e.g. medical). Other characteristic devices include excessive lexicalisation, the use of neologisms, special phraseology (unclear and empty phrases) and the elimination of words and phrases (Gastil, 1992, 474, as cited in Vuković, 2014b, 217). On the grammatical level, manipulative mechanisms are reflected in the use of simple sentences for clear and simple presentation of one's own positive traits, and complex sentence structures to cover up one's negative traits; the use of passive sentences, future tense and conditional verbs; the use of nominalisations instead of verbs to disclaim responsibility; and frequent use of imperatives, modalities and pronouns (*I/we* used in a positive context, and *you/they* used in a negative context). To present themselves in a positive light, speakers usually use emphasis, claims, hyperboles, topicalizations, explicitness, directness, narrative illustration, argumentative support, detailed description, and summarization (Vuković, 2014b, 237; van Dijk, 2012, 34-64). In contrast, when talking about others, they use linguistic devices such as denial, belittling, detopicalization, marginalization, unclear and general description, etc (Vuković, 2014b, 237; van Dijk, 2012, 34-64). From the point of view of rhetoric, persuasion is materialized in the political discourse through a range of rhetorical figures: metaphors (the most common one is *discussion as war*, *discussion as sports*), metonymy, repetition (lexical, semantical, syntactical and phonological repetition), euphemism, hyperbole, irony, personification, contrastive pairs etc (Vuković, 2014b, 231). The above are just some examples of manipulative linguistic patterns that may be used in the political discourse. Each analysis of a political text reveals new expressions and structures that may serve as the means of displaying political power and of manipulation in a given context.

The comparison of the properties of thus described political discourse and the media discourse related to the pandemic points to a high level of consistency and similarity in the use of language structures between the two discourses. Like in the political discourse, linguistic persuasion and manipulation mechanisms are present at almost all levels of the pandemic discourse, whether the articles in question quote statements given by medical professionals, or present news and opinions drawn up by journalists themselves.

Research objectives and methodology

This paper seeks to analyse the content of articles about the epidemic, published by Croatian web portals, which represented opposing views; and investigate which linguistic devices the medical professionals and journalists used in their efforts to shape the public opinion, and persuade the audience to believe the views they advocate. The authors divided the articles they analysed into two groups. The first group comprises statements given by experts, and comments written by journalists, which are aligned with the positions of the Headquarters and the Government (as the authorities that make the mandates aimed at preventing the spread of the diseases), and advocate unconditional vaccination, or hold a neutral view about the matter. The second group comprises articles supporting the positions opposed to the introduction of mandates and vaccination. The linguistic features of the selected articles were analysed and compared with the features of political discourse detailed above, characterised by the use of different linguistic manipulation mechanisms. According to the study by Vozab and Peruško (2021, 25), the leading online news sources in Croatia in 2021 were “index.hr (64%), 24sata.hr (57%), jutarnji.hr (48%), net.hr (39%), dnevnik.hr (39%), tportal.hr (36%), vecernji.hr (35%), telegram.hr (22%), rtl.hr (20%), dnevno.hr (20%), direktno.hr (14%), slobodnadalmacija.hr (14%), and novilist.hr (11%)”. For the purposes of their analysis, the authors of the paper analysed articles published by these and other portals (dw.com, koronavirus.hr, poslovni.hr, glasistre.hr, hzjz.hr, vlada.gov.hr, vijesti.hrt.hr, priznajem.hr, plivazdravlje.hr, narod.hr) whose topics were related to the coronavirus, and which contained the following keywords: *coronavirus*, *vaccine*, *COVID certificate*, *recovery*, *pregnancy*, *symptoms*, *cases*, *children*. The analysis was based on the fundamental principles of critical discourse analysis, prioritising the analysis of language in use, and its relationship with the society in its approach. The authors analysed a total of 79 randomly chosen articles, published by web portals between February 2020 and August 2022. 60 of these articles were classified into the first group, and 16 into the second. Three of the articles contained statements from both groups.

Linguistic analysis of the media coverage of the coronavirus

As one of the most important manipulation strategies (van Dijk, 2006, 373), polarization is associated with a strategy of positive presentation of oneself, and negative presentation of others (Vuković, 2014b, 237; van Dijk, 1995, 144), and has a significant role in the political discourse. Polarization is achieved using a variety of techniques and linguistic mechanisms, which very often include the use of personal pronouns. First person singular or plural (*I/we*) is used to present oneself, and third person plural (*they*) is used to refer to anyone who does not share the message sender's views. Personal pronouns in second person plural (*you*) are mostly avoided in the political discourse to avoid the impression of distance between the politics and the people (Vuković, 2014, 228). Linguistic structures of this form are used in the Croatian media's coverage of the coronavirus, and are present in both groups of analysed articles: statements advocating the positions of the Government and the Headquarters about the mandates and the introduction of COVID certificates, and statements opposing this position. Both groups blame the other (*they*) for the high number of cases. Example:

They bear a political, moral and ethical **responsibility** and **will have to face the citizens** whom they have been telling these things, which are not true, Beroš said. (The statement concerns a member of the scientific community who was opposed to the introduction of COVID certificates.)

In addition to having a *political, moral and ethical responsibility*, the opponent will face the consequences of his unreasonable behaviour: he will answer to the citizens. In addition to the polarization *I = good / they = bad*, another form of polarization is hidden in this sentence: *we = majority / they = minority*, with the message sender including the citizens on his side, so that they form this majority together. By letting his opponent know that he belongs to a minority, the message sender minorizes the person who does not share his views, because the assumption is that the majority that shares the same thinking is also right. Such statements are evident in the following examples:

Most citizens have recognised this, and I would like to thank them for it. A remedy will surely be found for the **individuals who have not recognised it**.

It is **our job** to warn **these others** to do it, Beroš said.

This is a denial of everything science has created in the 21st century. I ask **these people** if they will throw away their mobile phones, cars, and TVs, and go back to horse-drawn carriages? I really cannot understand this.

Identification with the audience (*It is **our job** to warn...*) is also a very frequent form of manipulation. On the one hand, this approach is used to create a sense of familiarity with like-minded people, but on the other, plural over singular (*we* over *I*) is also used when the speaker seeks to deny responsibility (Podboj, 2011), or share it with others. For example, the message sender's negative image is softened when the statement reads: *It is our job to warn these others to do it*, as opposed to: *It is my job to warn these others to do it*.

For polarization purposes, message senders often use demonstrative pronouns to refer to people who do not share their views, in addition to personal pronouns, making the subtle distancing even more pronounced (for instance, the sentence *It is our job to warn these others...* could have been phrased as *It is our job to warn them...*, and *I ask these people...* could have been phrased as: *I ask them...*).

These three statements have multiple background meanings. On the one hand, they are an obvious example of polarization, dividing the population into two categories. The first (which includes the message sender) is modern and praiseworthy, accepts scientific achievements without question, and makes wise decisions. This first group also has legitimacy, because the *majority* of the citizens falls into this category. Conversely, the second group is small (*individuals who have not recognised this*), the message sender *cannot understand* its representatives (*these people*) because they are responsible of *denial of the science of the 21st century* (do not accept his solutions), and his opinion is that they should go back *to horse-drawn carriages* (in other words, they are primitive). On the other hand, the statement is a sort of a threat directed at those who do not share the message sender's views, even though the type of sanctions that will apply to them

is not precisely defined (*A **remedy will surely be found** for the individuals who have not recognised it*).

Denying responsibility and evading direct accusations against one's opponent is another feature of political discourse. This is accomplished by leaving out verb phrases (nominalization) and using subjectless and passive sentences. We find such examples in the first group of analysed articles:

This is a **denial** of everything science has created in the 21st century. (The sentence does not specify who is denying it, even though the reader can clearly infer from the context who the message sender is referring to.)

The recommendation is to wait for at least a month to achieve a better immunological response to the vaccine than if the vaccine was administered earlier. (The sentence does not specify who recommended this.)

The recommendation is that every pregnant woman consults her attending gynaecologist and discusses with him/her whether she will receive the vaccine, and what her risks are.

“It is **definitely advisable** to get the booster dose regardless of the number of antibodies (...)”, Dr. Venus told us. (Message sender avoids taking full responsibility, which he would have done if he had phrased the sentence as *I definitely advise...*)

This **decision is being introduced** “to increase the citizens’ health safety, as **it had been done** previously in the healthcare and social welfare systems”. (The sentence does not specify who is introducing it.)

It is not advised to get an antibody test. **The important thing to emphasise** is that a person can get an antibody test when they wish to know if they had been in contact with the virus, but this cannot mean anything to us as regards the future response to the infection. (The statement contains no specific information on who advises or who emphasises.)

In the analysed articles, both groups draw attention to the threat of developing serious symptoms of the disease, using words with a marked meaning that inspire extremely negative emotions for intimidation purposes:

The pandemic has been **ploughing through** the adult population globally for two years already, while children have mostly been spared the **bleak** statistics.

Bleakest prognosis / Get ready for an endless corona-winter (...)

A new **record** in the number of new cases in Croatia, 64 persons died with the coronavirus.

“The virus (...) continues to spread and mutate, and **it continues to kill**”, he emphasised.

European countries introducing stricter coronavirus protection mandates again, protests **erupting**.

Low vaccine coverage in eastern Europe has resulted in “**brutally** high mortality rates”, Politico reports.

The first group uses hyperboles and words with marked meaning, further exaggerating the already intimidating threats:

Germany, Poland, Hungary, Czechia, Bulgaria and Romania reported **record high** daily numbers of cases on Wednesday...

Only 27% of children aged 5-11 received the first dose of the vaccine in the USA (...). The number of hospitalized children (...) **peaked** this month, reaching as many as 914, a **drastically** higher number...

The fast spreading of the omicron strain has led to **record** high numbers of infections and hospitalizations of children.

The situation described caused a change of policy in many European countries, including the re-introduction of mask mandates and lockdowns, even where the vaccination rates are high, to avoid a **disaster** in the winter months.

Scientists send out an **alarming warning**: ‘Forget about COVID-19, something much worse is about to hit us...’

The dramatic tone is reinforced in these examples by using intensifiers (*already, record high, only, as many as, continues to: for two years **already, as many as 914, even** where the vaccination rates are high, **drastically** higher number, **continues to kill, only** 27% of children aged 5-11 received the first dose of the vaccine).*

In addition to the highlighted words, the second group often uses the future tense, as well as negation forms and adverbs expressing frequency (*never*), to inspire as much fear as possible. Such a choice of language also creates the impression that the speaker is reliable and well-informed (Vuković, 2014b, 224), and the message sender consequently earns the citizens' trust:

This virus is here **to stay, and we will never get rid of it.** (...) we had known that it is impossible to eliminate and that **we will all catch it.** All the measures we are taking **will not reduce the number of people who will get sick,** but will only possibly **spread it out a little bit** over a longer period, he said.

The death toll will rise. (...) approximately 6% of the infected will **end up** in hospital.

The virus **will not go away** just because countries have stopped monitoring it.

Both groups very often use common expressions like *caution*, *new wave*, *another increase in the number of cases*, *risk*, and *scenario*, subtly maintaining constant tension by alluding to a future development of events that will push the number of new cases up even more:

European Commissioner for Health and Food Safety Stella Kyriakides called on 27 member states of the Union today to take advantage of the summer to **prepare for a new wave** of coronavirus infections in autumn and winter.

... **Cases are rising again,** (...) which poses an additional challenge for the governments struggling with the effects of the **earlier waves** of the pandemic...

... all countries are detecting these strains more or less now, which has led to increased **caution.**

The Government has called on the citizens to exercise special **caution** ahead of the upcoming long weekend and the upcoming summer school break.

Omicron **can cause a fifth wave,** and if it merges with the fourth wave, things will get difficult. Delta needs to be put under control.

Infectious disease specialist professor Darko Nožić, PhD (...) **warned** about the possibility of the coronavirus and the Western Nile virus merging, because they have a similar clinical picture.

However, the significance of the discovery that the **risk of reinfection** in case of omicron is 2.4 higher than in the **first wave** is emphasised.

We must **exercise caution**, but we must not panic.

We bring you the possible mandate **scenarios**

Intimidation is also present in a number of articles that find legitimisation in listing numbers and statistical data. Both groups use such devices:

The number of cases is increasing in Croatia again: it is **up by almost 200** compared to yesterday. **1858 patients** are in hospitals, of which **239 patients** are on respirators.

The situation is the worst in the Split-Dalmatia County, where there were as many as **1500 new cases to 2500 tests**.

It was mentioned that the number of cases is on the rise in Serbia for both viruses: the coronavirus alone was **confirmed in 5,896 people** in the last 24 hours, and **14 people died** from the effects of the virus.

The Western Nile virus was diagnosed **in 34 cases, of which 11 have a serious clinical picture**, and **three have died**.

After intimidating, both groups offer their solution to the problem, which the message senders believe is the only right one. The two groups offer different solutions, depending on the ideology they advocate. The first group sees the solution in the observation of the mandates, vaccination, and the introduction of COVID certificates, believing that the objective should be to encompass as many citizens as possible of all age groups, while the second group is opposed to the mandates and the introduction of the certificates, and suggest that vaccination should focus on vulnerable groups, while the others should have the ability to choose for themselves. Both groups use excessive lexicalisation and special phraseology to persuade the citizens to side with their positions, citing scientific studies to give legitimacy to their views. They mention the names of vaccine manufacturers (*Moderna, Pfizer*) and the forms of scientific evidence that they refer to:

research/study/paper (by Moderna, Pfizer), analysis, scientific truth, based in science, leading magazine, researchers, scientists, university:

Study of the Moderna vaccine (...) indicates that the protection lasts for up to four months after full **vaccination**. People still have **high antibody levels**, which decline very little over time, and this means that the **protection could last longer**, she said, adding that **Pfizer's study** showed that the **vaccine protects** from the mutant models too.

... commenting on the **studies published in the Science magazine**, which maintain that **immunity lasts** for at least eight months after **vaccination**.

Acquisition of natural **immunity** has become a popular excuse to **avoid vaccination** against COVID-19, but a new **study by the University of Pittsburgh** has showed that the **antibody level** varies significantly after **infection**, and is insufficient in many cases to **protect** a person from **reinfection**.

Lauc (...) said that 98% of all the deceased who tested **positive** were over 50 years of age, and that a number of **analyses** have shown that the mandates will end up killing more people in total than the **virus** in this pandemic.

In short, **immunity** acquired from **recovery** is very **long-lasting** and very strong, Lauc emphasises. Enough very firm evidence has been collected so far to allow us to consider this statement a **scientific truth**. Recommendations that persons who have **recovered** from COVID19 should get the vaccine are not **based in science**: they are nothing other than **vaccine** manufacturers' marketing messages.

Leading medical journal JAMA published a **paper by researchers** from the John Hopkins **University** yesterday, who measured the amount of **antibodies** in the blood of persons who **recovered** from COVID-19 for almost two years. Their conclusion is clear: after **recovery**, you develop a similar **amount of antibodies** as after vaccination, but after **recovery, the antibodies** remain in the body for almost two years (and probably longer, but the **study** lasted for two years), while the antibodies developed after **vaccination** remain in the body for mere months.

Professional medical terms (Štrkalj Despot 2020) have become commonplace in everyday communication, including: *infection/virus, recovery/morbidity/recovered/infected, immunity, (long-term) protection (duration), (high/low) level (amount) of antibodies, vaccine/vaccination/vaccine avoidance, positive/negative, symptoms, respiratory disease, SARS-CoV-2, COVID-19, strain.*

... all countries are detecting these **strains** more or less now, which has led to increased caution.

Recommendation on **vaccination** against COVID-19 after **recovery**...

... it seems that people who have **recovered from the coronavirus** have **longer-lasting immunity**...

Immunity after **coronavirus infection** lasts for at least five months...

... **immunity** after **vaccination** lasts for at least eight months.

... **Recovery** “provided **more protection against infection** than vaccination”, he said.

Characteristic phrases that have taken on new meanings in the context of the pandemic have also started to be widely used: *safety, wave, scenario, caution, infection, protection, going forward, new strain, mandates | easing of the mandates | precautions, isolation | self-isolation, recommendation.*

In response to a question about the **easing of mandates** in Croatia, she said that it is now winter...

A **new wave of coronavirus infections** is quickly spreading in Asia...

Even though the **fourth wave of the pandemic** has still not ended, the emergence of the new omicron strain of the **virus** has led the experts to announce the possibility of another, **fifth, wave** as early as at the beginning of 2022.

The **recommendation** is that each pregnant woman discusses with her gynaecologist...

It is also noticeable that professional and unintelligible (medical) terms are being thrown around, creating the impression of the speaker’s prestige

and knowledge. Such speech implies that the authorities must be trusted uncritically. Advocates of both groups use such devices:

In vitro fertilisation (IVF) treatment and pregnancy are conditions that may heighten **the risk of blood clotting disorders and aggravate hidden health issues.**

... the condition that makes the woman **predisposed to a viral infection.** (...) there is a **concern regarding the potential impact on foetal and neonatal outcomes** (...) attention should be paid to the **clinical manifestation of COVID-19 infection during pregnancy, type of delivery, neonatal outcome and risk of vertical transmission** of COVID-19 infection from the mother to the child.

To persuade message recipients that they need to get the vaccine, the use of modality, customary political phrases and ideologemes inspiring emotions and compassion is characteristic of the articles in the first analysed group. Their role is to inspire trust in the message sender, but also to induce a powerful sense of responsibility in the citizens. Such language constructs signal that the lives of their loved ones and all other citizens depend on the behaviours and actions of every individual, in addition to their own lives:

We need **solidarity**...

On behalf of all Croatian doctors, they once again call on **every Croatian citizen** to get the vaccine to **protect themselves and others.**

To **minimize the damage, the number of new cases, and, unfortunately, deaths,** it is very important now to **be very responsible** and **observe the mandates** until as many people as possible **get the vaccine...**

He added that the use of COVID certificates in the public and government sector was necessary to show the **pattern of behaviour** and the **government's responsibility.**

In their opinion, the solution they offer is the only right solution, and everyone should accept it without question. In this way, responsibility is indirectly, and sometimes also directly, placed on the citizens, who are seemingly given a choice, but in reality are clearly told what exactly they

should choose, or else they will be held directly culpable for a possible deterioration of the *epidemiological situation*:

There were 6136 new cases in Croatia in the last 24 hours. The coronavirus test positivity rate is at about 40 percent. This shows that the epidemic is still raging, that the virus is spreading, and that **we as a society are not cautious enough, we are not observing the epidemiological mandates**, and we **have not reached** the vaccination rate that would curb the spread of the virus in some way.

The message to the citizens should be that they directly influence the general situation in hospitals and in the healthcare system with their decision regarding vaccination, said the Minister of Health Vili Beroš...

The next statement also suggests that the citizens are responsible by implying that they have not observed the mandates that have been introduced, which resulted in an increased number of cases:

Experts associate the substantial increase in Split with Advent and Christmas gatherings.

Emotions and fear are also roused indirectly by drawing attention to the problems faced by healthcare professionals, letting people know that the healthcare system is struggling in other segments as well, and that the citizens will not receive timely and high-quality healthcare as a result. Special phraseology is also used to accomplish this: *healthcare, healthcare system, healthcare professionals, staff shortage, pressure, burden, rise in cases, patients, hospital, hospitalization*:

The combination of the **sudden rise in COVID-19 cases** and **hospitalizations**, the worst flu season in recent years, and the shortage of staff due to illness puts the **healthcare professionals** and the entire **healthcare system** under substantial **pressure**.

Out of this number, 765 infected **patients are in hospitals**, which has caused longer waits and the **cancellation of surgeries**.

“We have not had such a difficult time since the war. There is nothing harder than watching a man die...” (the statement of a healthcare professional)

... which could cause an extra **burden** for the already **struggling healthcare system**.

The COVID-19 pandemic has made the already enormous costs of the **healthcare system** even **higher**.

The **hospital system** adapted to the epidemiological situation caused by the coronavirus, which meant **postponements** of non-urgent **examinations, tests** and **surgeries**, further **hindering access to healthcare** for many citizens.

In situations when the citizens voiced doubt, demanded answers to questions about the safety of the vaccines and about other options to determine the existence or lack of immunity, and questioned the purposefulness of the vaccination for persons recovered from COVID-19, facts were often chosen and shaped selectively, and illogical statements and empty words and implications were used to avoid speaking about the immunity acquired from recovery, and persuade the citizens to get the vaccine. The devices used for this purpose included aggregation of information (expanded code) about the topic message senders wanted to emphasise, and eliminating information (restricted code) about the topic they wanted to avoid discussing. This form of communication was used by representatives of the first group:

... he recently said that antibody testing was **not recommended** for general use. Persons who are prone to infections, or immunocompromised in general, can learn **important information about the success of the first two doses** from such tests, he explained. (The statement illogically suggests that antibody testing is not recommended, even though it can provide important information, but only to persons who are prone to infections or immunocompromised. The readers never got an answer to the question why this does not apply to the rest of the population, who are not *immunocompromised*.)

The **third phase of clinical trials was not carried out** because it is really demanding. However, most international public health institutions and gynaecological associations, including the Croatian Institute of Public Health, **recommend that pregnant women can nevertheless get the vaccine**, because **no serious side-effects have been registered in most cases so far**. (The statement suggests that vaccination of pregnant women is recommended, even though all phases of clinical trials have not been carried out.)

Study of the Moderna vaccine (...) indicates that the **protection lasts for up to four months** since full vaccination. People still have high antibody levels, which decline very little, which means **that the protection could last longer**, she said, adding that **Pfizer’s research showed that the vaccine protects** from the mutant models too. She believes that it is difficult to estimate for how long the vaccine should protect us, **because there are not enough long-term studies. Moderna is now planning a 13-month monitoring programme that will include the occurrence of possible longer-lasting side effects and protection** (...) preliminary studies have led them to **expect the protection to last for longer than a year. Optimists expect it to last for up to several years**, she underlined. When asked how many persons became infected with the coronavirus twice, Markotić said that **all reports would have to be reviewed** to be able to answer this question, **and all reports have probably not even been released.**

This last statement is an obvious example of punctuation of convenient facts about the benefits of the vaccine and the long-term protection it provides in spite of the shortage of firm and specific facts (*not enough long-term studies*), while avoiding discussion about the duration of immunity from recovery (making it clear that all studies have *probably* not been released, but suggesting that even the reports that are available have not been reviewed). An impression is created of hesitancy among the experts to release the results of the studies on immunity from recovery. Such incomplete statements, formulated with obvious bias, have probably been the greatest contributing factor to the citizens’ mistrust in experts and authorities. There are also meaningless statements whereby words are uttered without anything actually being said:

Dragan Primorac, member of the Government’s Science Council, says that **there is only one recommendation: to follow the recommendations of the relevant authorities.**

The pandemic has also generated plenty of neologisms, which are present in both groups of articles (*booster shot, headquarterocracy, pandemic marketing, vaxxers/antivaxxers, coronisation*). Their role was to surprise and to insinuate a closeness and intimacy with the audience (Sorning, 1989, 108, as cited in Vuković, 2014b, 218).

The President said that he does not support **antivaxxers**, and that he has demonstrated this by example.

We have had a **headquarterocracy** for a year and a half.

... because it turned out that the people who had their **booster shot** (...) experienced no specific side-effects because the immune response after the **booster shot**...

... some of these test results merely indicate the presence of the virus in the person's nose, which can be due to **coronisation**...

... should not allow the people who run it to fall into the network of **pandemic marketing**.

... **antivaxxer** disinformation contributes to the risk.

There are also subtle (but also direct) references to the responsibility of institutions:

Given the **influence that bishops and priests have on the citizens, I'm sorry that they missed the opportunity** to underline the importance of vaccination as an important element in the fight against the virus (...) the holidays are coming, and **I trust that they will have the opportunity to call on their congregation** to observe the mandates, and protect their own health and the health of the nation. **I believe that they will show maturity and awareness in solving problems going forward** – he added.

This is an example of several manipulation techniques whose real purpose is to indirectly accuse the institution of not doing what it should have (*I'm sorry that they missed the opportunity*). The use of the verb *believe* is actually a substitute for the verb *expect*, and the sentence *I believe that they will show maturity and awareness in solving problems going forward* is actually a veiled accusation, implying that they should have already done so.

A similar method of accusing an institution and holding it liable is visible in the following example in the second group of analysed articles:

A **serious institution** such as the Medical Chamber **should take a comprehensive view of the problem**, and should not allow the people who run it to fall into the network of pandemic marketing. New findings clearly indicate that vaccinated healthcare professionals pose the greatest risk of bringing the virus into hospitals at

the moment. **I do not know why the Chamber has not drawn attention** to these two very serious, and yet **very easily remedied problems**, Lauc said.

This statement actually tells us that the Medical Chamber is not a serious institution, because it does not take a comprehensive view of the problem, and because it lets people fall into the network of pandemic marketing. The institution has also failed to solve the problem, even though it is very easily remedied (the message sender sees the problem, and has the solution).

Seeking to discredit those who do not share their views, message senders pander to those who they assume could be persuaded to share their views, while implying that the other camp does not have the described qualities, even though they should. Experts whose statements belong to the second group of articles use such devices:

Secondary school and university students are the population that **thinks the most**, learns, and **strives to understand the world around them. It's a great pleasure to work with smart students**, and this is one of the rare reasons why I'm still at the university... (...) I take the greatest **pride** in the fact that our students, even though most of them have been vaccinated and have COVID certificates, overwhelmingly reject the idea that COVID certificates should be mandatory for everyone”, Lauc wrote on Facebook.

This statement also implies that those who do not share the author's views have the opposite characteristics of those described: that is to say, they trust the authorities blindly and do not think, or *strive to understand the world around them*, which also downgrades anyone who holds a different opinion.

Furthermore, attempts to persuade others to side with the message senders' views often come down to positive presentations of oneself, using the strategies of legitimization (citing scientific studies, statistics and the international community) and delegitimization (negative presentation of others through direct insults, discrediting one's opponents, using words with negative connotations and irony) at the same time (see Vuković, 2014b: 237-238). Such examples are found in both groups of articles:

If a member of the Government's Science Council says that the vaccination of persons under 50 years of age makes no significant

contribution to the response to the pandemic, I must publicly point out that more than 6,000 patients under 50 years of age have been treated for COVID-19 at Croatian hospitals. The number equals the capacity of the Dubrava Hospital times ten: it is as if you filled this hospital ten times over, Luetić said. (...) We have about 200 people in this age group who have died. This is four buses full of people whose vaccination is, according to Professor Lauc, not important for the pandemic, he added. Luetić also said that Lauc is not a doctor, that he lacks the required education, and that he will, in the long run, bear no responsibility whatsoever for the 200 people who died, or the 6,000 who were hospitalized.”

Regrettably, Dr Luetić is taking advantage of his function to manipulate the public and the Parliamentary Committee on Health. It is an indisputable fact that 98% of all fatalities who tested positive for SARS-CoV-2 were older than 50. Vaccination, unfortunately, provides very little protection against infection, and vaccination of the younger population will therefore not protect the older population in any way. It will influence the pandemic only insofar as the persons who have had the vaccine will have milder symptoms. Since 50% of persons under 50 years of age in Croatia have already been protected by vaccination or recovery, even if we vaccinated 100% of persons under 50 years of age, it could reduce the number of deaths by 0.5–0.7% at most, Lauc retorted.

Conclusion

The conclusion of the analysis is that the articles about the coronavirus, published on the highest-readership Croatian web portals, were characterised by language patterns similar to those used in political discourse. The group that accentuates the danger of COVID-19 and advocates unconditional vaccination, and the group that opposes the mandates and the vaccination, equally use manipulative linguistic procedures to convince others of their own ideological principles. Since the representatives of the first group were an overwhelming majority in the Croatian media during the pandemic, their statements and reflections are also much more imaginative in their choice of linguistic structures as persuasion and

manipulation devices. They use various methods for downgrading others and holding them liable, emphasising only convenient facts and eliminating inconvenient ones, using imprecise words, intimidating their audience and purposefully rousing strong emotions to gain the trust of their audience, which should ultimately follow their instructions. They also often cite the global community and science as the authorities that should be trusted and followed unconditionally. The second group for the most part uses excessive lexicalization, intimidation, denigration, blame laying, and references to reason and scientific research that, according to their claims, the Croatian experts have chosen to ignore, which makes them directly responsible for the high number of cases. The first group sees anyone who opposes vaccination and the mandates as their adversaries, which includes citizens and experts alike, while the second group criticises only the representatives of the Headquarters and the Government (who decide about the mandates), portraying the citizens as the victims of their manipulation and “pandemic marketing”. The first group for the most part uses more subtle structures to present their ideological principles, implying certain condescending attitudes, while the other group openly denounces the culprits, often aggressively and directly.

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JEZIČNA ANALIZA POLITIČKOGA DISKURSA NA PRIMJERU MEDIJSKIH NAPISA O KORONAVIRUSU

Sažetak

Digitalni mediji i sredstva masovne komunikacije imaju značajnu ulogu u širenju informacija. Istraživanja (Vozab i Peruško, 2021) pokazuju da je pandemija samo ubrzala već otprije vidljive trendove pomaka prema digitalnim izvorima vijesti. Tako je internet u 21. stoljeću postao najveći izvor informacija koji upotrebljavaju osobe različitih dobnih skupina (Benzinović, Dabo i Šimić, 2021). Autori također ističu i da mediji utječu na oblikovanje javnog mišljenja (Jurčić, 2017), posebice kada je riječ o temama o kojima čitatelji imaju vrlo malo ili nikakvo znanje (Klapper, 1974, prema Kovačević, 2020, 5). Chomski (2002) čak tvrdi da mediji sudjeluju u kontroli i nadzoru mase, a neki upozoravaju da imaju veliku moć tijekom kriznih situacija jer „filtriraju i uobličavaju slike mogućih rješenja nastalog stanja, s tendencijom pojačavanja već prisutne pristranosti (...) koje postoje u javnosti“ (Nelkin, 1987, prema Kovačević, 2020, 5-6). Pandemija nastala pojavom koronavirusa dobra je podloga za stvaranje straha te širenje lažnih i senzacionalističkih vijesti i spinova koji i inače nezasluzeno zauzimaju svoje mjesto u medijskom prostoru. Kako je jedan od preduvjeta odgovorne uporabe interneta sposobnost prepoznavanja lažnih vijesti i razvijeno kritičko mišljenje, pitanje je može li – u masi proturječnih informacija koje razni autoriteti nude o zarazi, širenju, zaštiti i liječenju od koronavirusa – čak i osoba s izgrađenom sposobnosti kritičkog mišljenja prepoznati istinu od neistine. Cilj je rada jezično analizirati sadržaj internetskih medijskih napisa o epidemiji koji zastupaju oprečna gledišta i istražiti kako taj sadržaj utječe na oblikovanje javnog mišljenja. U tu svrhu analizirani su tekstovi objavljeni na najčitanijim hrvatskim portalima i službenim stranicama za informiranje o koronavirusu koji sadržavaju ključne riječi koronavirus, cjepivo, COVID potvrda, preboljenje, trudnoća, simptomi, zaraženi, djeca. Preliminarni rezultati pokazuju da tekstovi obiluju nejasnim, nelogičnim, polovičnim ili kontradiktornim informacijama, a jezična sredstva koja se u njima upotrebljavaju imaju obilježja političkog diskursa.

Ključne riječi: epidemija, jezična analiza, koronavirus, mediji, politički diskurs

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THE POWER OF TELEVISION SPECTACLE: FEMINISM AND POPULAR TELEVISION

Scientific paper
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Abstract

Popular television is perhaps the most important tool for the production and promotion of popular culture content. It is a strong place of resistance and a space for various cultural struggles, including the feminist struggle that we observe through a number of genres and characters that resist established definitions of femininity and typical female characters. Products of popular culture, such as television soap operas, and lately a number of other genres, especially those that put female characters in the role of heroines, have enabled the development of a diverse spectre of female characters and given their audience a place where they can find authentic representations of their identities and life experiences. Through the analysis of such series, this paper will show how popular television, empowered by the ideals of feminism, and above all, popular feminism, introduced many female characters to a wider audience, and has undeniably become one of the primary places for female consumption of popular culture.

Key words: popular culture, television, resistance, feminism, female character

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Introduction

The field of popular culture and its theories are still a significant part of the dynamics of contemporary cultural, philological, sociological and other social and humanistic research. Popular culture has been associated with mass culture since its beginnings, or it has been defined as a part of mass culture, and the terms mass and popular are often used as synonyms. This paper primarily uses the concept of popular culture based on the theoretical reflections of the contemporary British sociologist and culture theorist Stuart Hall, especially his thesis from the text *Notes on deconstructing 'the popular'*. He states how the study of popular culture should begin with a dual movement in mind, the movement and both adherence and resistance, which is always and inevitably found within it. (Hall, www.freewebs.com/dcelcer/StuartHall2.doc) It should be noted right away that, in his research, Hall links the study of popular culture to the study of the history of labour and the institutions of the working class. However, this must be viewed in the context of the wider historical picture. The author makes conclusions about certain periodization problems in the study of popular culture, including an opinion on the strong qualitative changes in the field of popular culture that occurred in the post-war period.²⁰ Namely, it is not only about “changes in cultural relations between classes, but also about changed connections between people and the concentration and expansion of the new cultural apparatus”, based on a strong technological revolution, especially since the 1960s. In addition to the technological revolution in this period, the socio-cultural changes that swept the world started a sort of dynamics of liberating processes on many social and cultural levels. The freedom of choice to consume popular culture products, the possibility of changing the meaning of pop culture products and their symbolic redefinition in the field of culture, but also the struggle for freedom and greater rights of marginalized groups in society, such as African Americans in the USA or women in society, widened the channels through which popular culture increasingly cut deeper and stronger into the petrified body of western societies. Moreover, this was a period of profound structural changes in the society: “there are not only changes in the relations of power, but also the establishment of the area of political

²⁰ After the Second World War.

struggle itself". (Hall, www.freewebs.com/dcelcer/StuartHall2.doc) This paper will be guided by some of Stuart Hall's thoughts on popular culture, that is, one of the theories about popular culture, based on the thoughts of European cultural theorists such as M. de Certeau, P. Bourdieu, R. Barth, S. Hall and M. Bakhtin, and mostly John Fiske with his thoughts on the theory of popular culture. The course that Fiske pursues in the study of the theory of popular culture is one that sees popular culture as a space of struggle and resistance against the forces of domination and the establishment of popular tactics that avoid, suppress or loosen the pressure of power. This approach seeks to understand the forms and mechanisms of everyday resistance and avoidance of the pressures of ideology, with faith in the energy and vitality of people as the motivation for initiating social changes.²¹ As a rule, popular culture itself is a part of power relations. Moreover, it contains fragments of the constant struggle between dominance and subordination, power and resistance, or avoidance of power, between strategy and tactics. Popular culture, according to Fiske, is culture rather than consumption. It is distinctive for transforming the act of consumption into an act of cultural production because, in this context, consumption is always the production of meaning (Fiske, 2001: 28, 31). Models of popular culture, therefore, show not only the presence of money, but also values, meanings and pleasures. Popular culture, therefore, is not produced by the culture industry, but by people. That is why it is brought into direct connection with the everyday life and active attitude and experience of its devotees. Everything that is a part of everyday life is a part of the context in which consumers of popular culture also appear as its makers.²²

The relationship between popular culture and everyday life is multifaceted and reciprocal, and can be viewed from at least two directions. If we look

21 According to Fiske, until recently, the study of popular culture took place in two basic directions. The less productive one glorified popular culture without placing it in any model of power, that is, a kind of democratic version of elite humanism that moves the cultural life of a nation from the high field to the field of popular culture. The other direction places popular culture firmly within the power model, highlighting the strength of the forces of domination, in which it is then almost impossible to develop popular culture. Its place in this direction is taken by mass culture, imposed on a passive audience deprived of critical power by the culture industry. The third direction is the one mentioned above, which the paper will discuss in more detail. More in: Fiske, 2001: 29-30.

22 This is also one of the fundamental differences between popular and mass culture – one that implies imposed values and mechanisms of manipulation, reducing cultural differences between social classes, but often lowering the level of cultural value and enabling stereotyping.

at popular culture from the direction of everyday life, it usually carries *the moment of cause*. In other words, a certain situation in everyday life causes resistance, a kind of countermeasure and the production of (new) meaning in popular culture. If we look at everyday life from the direction of popular culture, we see that new values, meanings and pleasures are incorporated into the everyday life of the wider population. In this direction, too, there is a kind of resistance and opposition, mostly by individuals, but also by some social groups, to the influences of popular culture that permeate everyday life. However, they are often unstoppable, like for example, the penetration of rock music in the late 1950s and 1960s.²³ It is also necessary to emphasize that often, like in the above relationship, it is not easy to demarcate causes and consequences, or to recognize the directions from which and/or towards which certain influences come. Also, in many cases, it is not even necessary to draw boundaries or insist on the right of priority. The forms of cultural struggles from which popular culture emerges are, therefore, closely related to the activity, de Certeau's "arts of doing", of the broadest social masses and their everyday life, regardless of the direction and influences involved.

Since the 1960s, television has been a medium that has become one of the most important factors of popular culture. Popular television is a place of struggle and the production of meaning, including feminist struggles that influenced the portrayal of female characters on television, which is what we will primarily deal with in this paper. Throughout the long history of popular television, female characters have gone through a series of representations in order to fight for roles equal to their male "rivals". In line with the above popular culture theories, this paper will present a short history of feminism on television, from soap operas through sitcoms and female warriors to Netflix, the global hit of today. It will also show how the efforts of feminist critics influenced the change in the portrayal of female characters, but also how the television spectacle inversely affected feminism, because with the increasing success of feminism and the growing audience, it is no longer only about what feminism has said about popular culture, but also about what the audience has had to say about feminism.

23 In this case, we can talk about a kind of moment of consequence. There are numerous examples in the cultural history of the second half of the 20th century in which phenomena arising from popular culture resulted in strong and lasting cultural and even broader social changes. (Ileš, 2016: 133)

Television as a means of production and promotion of popular culture

Television as a mass medium²⁴ is one of the most important means in creating and maintaining the spectacle²⁵ of popular culture. It is the promoter of the consumer spectacle and enters the domain of economic, political, social and everyday life in new and significant ways (Kellner, 2008). In his book *Television Culture*, British popular culture theorist John Fiske interprets television as a “cultural agent, provocateur and circulator of meaning” (Fiske, 1987, 1). Television as a medium dominates free time, while its images and stories influence social norms and the formation of political attitudes, offering models for the formation of personal and social identity. By introducing new social and cultural elements into its texts that reflect popular trends in social reality, television influences social change and breaks down taboos (Sever Globan and Pavić, 2014). Characters on television are not only representations of individual persons, but are also codes of ideology and the embodiment of ideological values (Fiske, 1987). In the observed content, the viewer recognizes points of contact with his own life experience and with the values and opinions he holds, and the power and reach of the popular culture text are based on the emotionality produced by the show, i.e., the power of the audience’s potential for emotional connection with the cultural messages the product emits, and the consumer consumes (Labaš and Mihovilović, 2011).

As Fiske suggests in *Television Culture*, television programs need to be viewed as potentials of meaning, not just as a product/commodity. Television series are clearly defined in terms of format and duration, and will be the same wherever they are broadcast, but the television text itself is

²⁴ In his book *Television – the toy of our century*, Croatian television journalist and editor Damir Matković states “Television is an invention that undoubtedly marked our century. Thanks to its amazing ability to instantly jump across time and geography, television technology has turned the world into a global village.”

²⁵ The spectacle, in addition to providing satisfaction, progressiveness and social change, contradiction, emotionality and a break with traditional norms and values, is perhaps the most pronounced feature of popular culture (Labaš, Mihovilović, 2011: 101-106). Also, the characteristics and dominant expressions of popular culture are subject to constant changes. Popular culture is progressive and contradictory, constantly creating new social and cultural meanings. Expressions of popular culture are usually transmitted through mass media such as television, and are impossible to analyse separately. Therefore, we are dealing with the analysis of the television text as a popular culture text, and the ways of encoding and decoding that text.

a product of the reader's overall viewing experience. Television content thus becomes a cultural text only when the audience attributes a certain meaning to it (Fiske, 1987). It is relevant to mention here Louis Althusser's thesis on "interpellation", the process by which the media, as a part of governing institutions, form an ideological paradigm within which the viewer observes the world (Althusser, 1971). An additional influence is the perspective of the critical community, which defines quality itself under the influence of some kind of ideology, be it aesthetic, political or both. In other words, certain TV series can transmit a text with different meanings, depending on the audience watching it. Contemporary high-quality television series in this sense require a complex narrative structure, which implies that the work deals with complex topics and builds characters with complex personalities, which are narrated in an innovative way in stories of hybrid genres (Fiske, 1987).

Popular television, soap operas and feminism

French culturologist Jean-Pierre Esquenazi believes that the audience expects television series to paraphrase the real world more than any other genre: television series "would thus follow changes in the reality in which the audience lives, including those concerning the position of women in society and the development of the feminine consciousness and feminism" (Esquenazi, 2009, as cited in Sever Globan and Pavić, 2014, 138). Fiske mentions the example of female soap opera fans as extremely capable readers of popular culture texts. Such reading requires an understanding of the conventions according to which the TV program is constructed, as well as the use of one's own textual and social experience in the process of reading and understanding the television text. The satisfaction in studying the text comes from the fact that the (socially) subjugated find satisfaction in confirming their own identity as a resistance to the dominant structure, i.e., in confirming the legitimacy of women's meanings and identities in a patriarchal world (Fiske, 1987).

Anikó Imre, an American theoretician of cultural studies, explains in her work *Gender and quality television* that television, as an object of research, has been influenced by gender differences since its inception. In post-war America, television spread as a medium primarily intended for women

who were in the domestic sphere and open to consuming its contents, (Imre, 2009), especially those intended for a female audience. The development of feminist theory of popular culture is thus inseparable from the study of soap operas, which played a key role in its development (Grdešić, 2020). According to British popular television theorist Elke Weissman, the analysis of soap operas should be understood as a political and feminist project that was radical and subversive precisely because it understood soap operas seriously as a place of female pleasure (Weissman, 2016). In the words of Charlotte Brunsdon, initial feminist interests in television were “an appeal from a deep conviction that the oppression of women is linked to mass media representation” (Brunsdon, D’Acci, & Spigel, 1997, as cited in McCabe & Akass, 2006, 1). The strong relationship between feminism and television grew from the wider engagement of British cultural studies in the Centre for Contemporary Cultural Studies at the University of Birmingham, and efforts to understand popular culture as a battleground of meaning (McCabe and Akass, 2006). Ann Kaplan, an American feminist theorist, believes that this early critical view of television laid the foundations of an agenda whose goal was to understand the social context within which television is viewed, which is why the “receiver” has become a logical focus for research into the relationship between viewers and television texts (Kaplan, 1994, according to McCabe and Akass, 2006). Television owes its prestige precisely to feminist theorists, who “turned this area of low cultural significance and generally disparaged pleasures into a provocative ground for serious criticism” (Imre, 2009, 392), and later analyses such as those by Judith Butler, who questioned the binary of male and female, and viewed gender itself as nothing more than a performative construct, strongly influenced future representations of gender on television (Butler, 1990, as cited in McCabe and Akass, 2006, 1).

Today’s critical approaches in many ways reject the gendered category of television and the feminist foundations of television studies, and perhaps one of the most influential efforts to change television is the turn to “quality television.” The term “quality television” came into use in the 1980s in the United States. It was used by the HBO²⁶ network to present their programs as works of original creative vision, aimed primarily at an “elite”

26 HBO (Home Box Office) is an American television network with a subscription model.

audience, relying on an ensemble of actors, complex and overlapping narratives, and social and cultural commentary (Imre, 2009). The popular HBO drama from the late 1990s, *Sex and the City*, found itself at the centre of discussions about quality television and (post)feminism, along with other award-winning dramas such as *Ally McBeal*, *Buffy the Vampire Slayer*, and *Desperate Housewives*. As Imre states, the stories of those series focused on female characters, automatically placing them in the so-called space of “chick” programs, the equivalent of superficial women’s chatter and the glitz of women’s magazines, unworthy of serious consideration. Regardless of their popularity, complex characters and stories exploring taboo topics and social issues, what primarily distinguished them from many other popular series at the time was the fact that they focused on female characters (Imre, 2009). Apart from women in leading roles, these series do not actually have much in common, but the market puts them in a separate category that Maša Grdešić conditionally refers to as “women’s series”, i.e., series that deal with “female” topics such as love, sex, friendships, family, and are therefore considered less valuable preoccupations than the public sphere and political topics that belong in the “masculine” domain (Grdešić, 2020).

The category of women’s popular culture, or “women’s genres”, is a term introduced in 1984 by Annette Kuhn in the programmatic article *Women’s Genres: Melodrama, Soap Opera, and Theory*, which defined it as “the study of audio-visual texts, i.e., popular television and film forms intended for female audience, such as soap operas and melodrama” (Kuhn, 1984, as cited in Grdešić, 2013, 34). Charlotte Brunson also added to this category popular publications, such as girls’ and women’s magazines and romance novels, and in 2000 offered a more contemporary definition of women’s genres that also included popular culture texts: melodramas and soap operas, romantic comedies and “women’s” series, romance novels and chick lit, women’s and teenage magazines, etc. It also includes popular culture practices such as fashion, make-up, knitting, sewing, gossip, etc (Brunson, 2000, as cited in Grdešić, 2013, 35). Based on the above, women’s genres can be defined as “media, skills and practices of conventional femininity, i.e., fiction of femininity in mass culture” (Grdešić, 2013, 35). Kuhn singles out television soap operas and film melodramas as the popular narrative forms intended for female audiences that attract critical and theoretical attention. She defines them as “gynocentric genres”

because they are primarily aimed at female audiences and generally consumed by women (Grdešić, 2013).

One of the fundamental inputs of the early feminist critical and theoretical work on soap operas was the desire to study the genres that were popular and particularly popular with female audiences. Soap operas attract a large audience, mostly made up of women. The problem, however, becomes more complex when the questions of the content of such a television text and the relationship between the viewer and the meaning of the text are discussed (Kuhn, 1984). The question here is what actually makes these genres “feminine”: do the texts really have some kind of “feminine” form, or is it simply a matter of more women consuming them statistically? In her work, Kuhn references Tania Modleski, who argued in her texts about soap operas that this genre prioritizes the private sphere, insisting on traditionally understood “female” skills in solving personal and family crises (Modleski, 2008, as cited in Grdešić, 2013, 36). Kuhn believes that there is nothing inherently “feminine” in female genres, but that femininity itself is a discursive construct, a product of different ideas of what it means to be a “woman”. In western culture, this is usually associated with the categories of personal, private, home, family, motherhood, emotionality: the idea of a woman as a wife and mother (Kuhn, 1984, as cited in Grdešić, 2013, 38). Soap operas, like other “female genres”, put the private sphere in the foreground, focusing on family and home, love and marriage, friendship and community, and making such programs a rare place where skills and competences that are traditionally considered feminine receive preferential treatment. They rely on a certain cultural competence of viewers who are pre-constructed as “feminine”, and who will recognize the codes of their personal and own lives, but “at the same time offer their own representations of femininity that the recipient may or may not adopt” (Grdešić, 2020, 107).

From the perspective of “high” culture, soap operas are rejected as aesthetically worthless, poorly written, psychologically unconvincing and intended for a poorly educated mass audience, as well as a way of manipulating female viewers, primarily housewives, to whom their subordinate position is presented through the plot of the soap opera as a desirable form of idealized notions of traditional femininity, related to family and marriage (Grdešić, 2020). On the other hand, Kuhn states that soap operas offer the viewer a “position of power” (Kuhn, 1984, 27), a story that centres

on “female desire”, embodied in the main female character, which represents a gender shift away from the neutral, but actually masculine viewer, whom most products of “high” culture and popular culture supposedly address. In this sense, the argument that “in a society that is represented as masculine, these genres offer the possibility of female desire and a female point of view”, is used in defence of women’s genres (Grdešić, 2013, 36). Modleski, in turn, explored the relationship between soap operas and the daily life of women, believing that soap operas, in addition to offering the possibility of a female point of view, also fulfil the socio-cultural needs of women who felt isolated at home, playing up the intimacies of family life by offering a fantasy of a collective community (McCabe and Akass, 2006).

At the beginnings of television feminism – humour

At the beginning of popular television, housewives were the main “target” of American television companies. In the 1970s, American feminist critic Julie D’Acci analysed how white middle-class women, especially business women, became the new sought-after television audience. The socio-political environment of the time inspired American television companies to focus on sitcoms with a feminist undertone, such as *The Mary Tyler Moore Show* (1970-1977), *Maude* (1972-1978) and *Rhoda* (1974-1978) (McCabe and Akass, 2006, 3), transitioning away from the stereotypical presentation of female characters and the division of gender roles in which the woman appears as a happy and passive housewife and mother (Sever Globan and Pavić, 2014).

In her analysis of the leading heroines in early American television sitcoms, such as Lucile Ball from *I Love Lucy* (1951-1957) and Gracie Allen from *The George Burns and Gracie Allen Show* (1950-1958), American film critic Patricia Mellencamp argued that the heroines in question used humour as a tool to rebel against the “prison” of home life that many soap operas portrayed, and that the viewers of these sitcoms understood very well what the humour was hiding (McCabe and Akass, 2006). American communication scientist Bonnie Dow believed that “sitcoms were a breakthrough in the presentation of feminism on television, portraying their heroines as more mature and independent, and coinciding with

increasing emancipation of women in the society” (Dow, 1996, as cited in Sever Globan and Pavić, 2014, 139). At the same time, series such as *The Mary Tyler Moore Show*, with an unmarried business woman in the lead role; *One Day at a Time* and *Kate and Allie*, starring single mothers; and *Julia*, the first series with a black American woman in a leading, non-stereotypical role, which aired 1968-1971, reproduced and institutionalized the gender roles of the time, following the broader social changes and new female experiences (McCabe and Akass, 2006).

According to these examples, we are ready to understand the field of popular culture, including the medium of popular television, as a space of pop-cultural resistance. In societies where power is unevenly distributed, popular culture is shown to be a contradictory value, and the contradiction is expressed in power relations, in dominance and subordination, in power and resistance. The adaptive tactics of everyday resistance and the mechanisms of the popular culture act as *guerilla* attacks into the territories of power. Fiske’s thinking about the relationship between the meaning and pleasures of popular culture and political activity is particularly significant in this regard. He shows how the politicization of popular culture, which appears as a variety of micro-realizations and as a tactic of daily opposition and resistance of subordinates, usually occurs at the micro-political level. Thus, the politics of popular culture acts as a micro-politics in the tactics of everyday life, in which there is a redistribution of power between the forces of domination and subordination. Structural changes at the level of the system itself, regardless of whether it is politics, economy, legislation or family relations, can only be achieved if the system is undermined and weakened by the tactics of everyday life (Fiske, 2001: 27-28). Therefore, television content often put in motion micro social changes, or at least served as the space that opened up taboo topics to a wider audience and in some way sensitized the society to certain socio-political issues.

A new set of shows in the 1970s placed female characters in the realm of crime, action and fantasy worlds, once again hinting at broader social changes. These series included *Police Woman* (1974-1978), *Wonder Woman* (1975-1978), *Bionic Woman* (1976-1978) and *Charlie’s Angels*. (1976-1981). Despite the new liberation of these heroines, “the focus on their physical attractiveness has not changed. Thus, the heroines of *Charlie’s Angels* often achieve their goal by charming their opponents, but they also use physical strength to fight against them, which is a new element” (Sever Globan and

Pavić, 2014, 139). While female characters continued to appear in sitcoms most frequently, female protagonists in drama series were described as “youthful, and their true value was hidden precisely in their youth and beauty, while male characters were wiser and more powerful the older they got, and occupied a higher business position than their female partners” (Davis, 1990, as cited in Sever Globan and Pavić, 2014, 140).

Popular feminism, consumerism and warrior women

Moving towards the end of the 20th century, the growth of popular feminism and post-feminism resulted in an increase in the number of television shows with a post-feminist woman in the lead role, such as *Ally McBeal* (1997-2002), *Buffy the Vampire Slayer* (1997-2003), and *Sex and the City* (1998-2004) (Imre, 2009, 394). With the transition to the popular-feminist and post-feminist period of television, the roles assigned to female characters in television shows underwent some changes, and the traditional dichotomy of male versus female, i.e., *reason, strength, independence, intelligence, reservedness, career, dominance* versus *sensitivity, fragility, intuition, lack of independence, sexiness, motherhood, subordination*, became less present in favour of a more complex and equal portrayal of female characters. (Sever Globan and Pavić, 2013, 138)

In the 1990s, popular culture began to include more and more feminist ideas in its products, but that should not be understood without additional thought, because, as Nina Power puts it in *One-Dimensional Woman*, it is often just a matter of commodifying feminism and turning it into a commodity for the capitalist market. The author calls this contemporary feminism consumerist, underlining the similarity between “liberating” feminism and “liberating” capitalism, i.e., the way how the desire for emancipation begins to look like something replaceable by the desire to buy as many material things as possible (Power, 2009 according to Grdešić, 2013, 255). Gamman and Marshment questioned the way in which popular, consumer culture co-opts feminist ideas, such as “freedom” and “choice”, in order to address women as consumers. Power warns that today “feminism takes over the capitalist advertising discourse in order to better market itself” (Grdešić, 2013, 255). “Girlie” is a cultural phenomenon related to the third wave of feminism, and is defined as feminism for a generation

that grew up on popular culture, which is why the colour pink, knitting, nail polish, fun, pop and rock music, pornography, pleasure and sex are important places of identification for these girls. This type of insistence on the importance of popular culture in general, but also on its significance for feminism, which managed to enter the mainstream precisely thanks to popular culture, could be connected to a new trend within feminist cultural studies – popular feminism (Grdešić, 2013, 51).

Joanne Hollows in *Feminism, Femininity and Popular Culture* (2002) and Rachel Moseley in *Feminism in Popular Culture* (2006) advocate the thesis that popular feminism is a more contemporary and desirable direction of research development, considering that it is impossible to talk about real and authentic feminism which would be outside of popular culture due to the fact that most women born after the 1960s first encountered feminism precisely through popular culture:

“Academic and activist feminisms – however unpopular they may be – are not outside of these popular manifestations of feminism, but are part of the same social and cultural struggles over the meaning of feminism. In this sense, the emphasis is no longer solely on what feminism has to say about popular culture, but also on what popular culture has to say about feminism” (Hollows and Moseley, 2006. according to Grdešić, 2013, 52).

In Stuart Hall’s view, popular culture is an important battleground for feminism, which gave rise to disagreements regarding the meaning of femininity and the issue who creates it and in relation to what (Hollows, 2000). Charlotte Brunsdon, a British television and film theorist, analysed films such as *Pretty Woman* and *Working Girl*, trying to justify some pop-cultural products that she herself enjoys. Moreover, articles about *Buffy*, *Ally McBeal* and *Sex and the City* were often created, and the most common conclusion is that the very characteristics that made the studied product “fail the feminist test make them more resonant, interesting, compassionate and realistic to women today” (Grdešić, 2013, 52).

While mainstream television was still primarily occupied with male protagonists and heroes, less-known television channels featured female warriors in leading roles, in shows such as *Buffy the Vampire Slayer*, *Xena the Warrior Princess*, and *La Femme Nikita*. All three series have female warriors/fighters in lead roles who stand out with their independence, strength,

intelligence and style while questioning the ambiguities and complexities of everyday life along the way. In *Frustrating Female Heroism: Mixed Messages in Xena, Nikita, and Buffy*, Mary Magoulick, an American theorist of popular culture, argues that these shows were created in response to the female audience's dissatisfaction with the lack of female heroines on television. They did not like the fact that the new heroines they offered were no less sexualized than before, or that they did not create any new ideas about what it means to be a hero as a woman: they simply transferred the traditional roles of male action heroes to women. These series, it should be said, were created by men, placing the heroines in a space where they fulfil male fantasies more than they challenge the *status quo*. Within the series, these female warriors are not only threatened by a hostile environment embodied by various villains, but also by their private life within the domestic sphere, and romantic and emotional conflicts with partners, friends and family (Magoulick, 2006). Girl power, as presented in *Buffy*, is often portrayed in the media as true feminism, although it is actually a way of circumventing the complexities of feminism. Buffy is strong and sarcastic, her outfits are always impeccable, and she is the ultimate *femme*. Thus, she is not challenging the sensitive definitions of physical femininity. Female empowerment has been commodified through products that serve as advertisements for the show, or instructions on how to be fit like Buffy Summers (Fudge, 1999).

Nevertheless, Mary Magoulick believes that these shows fulfilled the hopes of many female viewers who celebrated them as strong, liberated and less emotional heroines than those of the previous generations, and offered new role models for female heroes, citing various American publications that celebrated Xena as “the vanguard of lesbian and feminist youth culture” and as a “self-confident, active woman in the lead role” who “victoriously proves her differences” (Magoulick, 2006, 731-732). Furthermore, “whatever weapons they use – humour, magic or combat – each of these heroines defined what it means to be a woman for a whole new generation” (Moy, 2002, as cited in Magoulick, 2006, 732). But regardless of the public (feminist) praise these shows have received, such feminism is still a source of frustration for many. The shows of the time emancipated the female characters from traditional roles by presenting them as supernaturally “strong”, but at the same time, equating their strength with “masculinity”. Many of these female characters can be seen

as male characters of the other sex, still rooted in the patriarchal system because male characteristics are understood as the norm. Such “strong female characters” were created pretending to be part of progress, but in reality, they are archetypes of male characters, without even realizing it. A strong female character in a typical progressive series possesses three elements: she is physically strong, emotionally closed, and presented to the audience as traditionally attractive, which only reinforces patriarchal ideals and keeps the heroine in the field of the “male gaze” (Moy, 2016, 2). Feminist film critic Laura Mulvey explains it as projecting a male fantasy onto a female figure where the woman is still treated as a passive, visual object (Mulvey, 1975). British author Sophia McDougall believes that “strong” male characters are treated differently than “strong” female characters. Male characters like Batman, Sherlock Holmes or Iron Man are not put in the box of “strong” characters. Rather, they are able to possess other characteristics, while the characterization of female characters is often narrowed down to “strong female characters”, ignoring their other characteristics (McDougall, 2013, according to Moy, 2016, 2). New heroines are therefore also commercial goods, as Sever Globan and Pavić (2016) have argued, which is also confirmed by the thesis presented by Mary Magoulick (2006), who states that the emergence of such television series coincides with the increase in the number of female viewers with a greater spending power.

Netflix and *the new generation of female characters*

With the entry of television into the 21st century, there has been a greater diversity in the depictions of female characters, female identities and experiences, but they still largely conform to the ideology of the dominant group in the society. However, it should be said that the shift could already be seen in one important, non-stereotypical example from the era of *Buffy* and *Xena*. The sci-fi series *The X-Files* (1993-2002) stars Dana Scully, an agent guided by reason and science; while her partner, agent Fox Mulder, is guided by faith, irrationality, and the supernatural, thus inverting the conventional gender roles (Sever Globan and Pavić, 2014). It is particularly significant to note that, although Dana is portrayed as “physically attractive and resourceful”, the *X-Files* camera “rarely foregrounds parts of her body and instead portrays her as capable and professional person”

(Kellner, 2009, as cited in Sever Globan and Pavić, 2014, 141). Therefore, this is an example of the shift from the aforementioned “male gaze” that we can see in the examples of *Buffy* and *Xena*, where “the heroines of television shows are still part of the long Western patriarchal media tradition, according to which women are the object of desire and gaze, i.e., a spectacle to watch, subject to the gaze of the (male) audience” (Sever Globan and Pavić, 2014, 146).

It should also be noted that the 1990s television shows are today seen as more problematic from a feminist perspective than they were back then, but they undeniably paved the way for many other shows with women in leading roles that came in the future (Paige, 2020). Before the 1990s, most television shows with leading female roles were comedies, and after *Buffy*, *Xena* and *The X-Files*, there was also a number of drama series with “warrior women” in the lead roles, such as *Veronica Mars*, *Homeland*, *Orphan Black*, *Jessica Jones*, *Supergirl*, *Batwoman*, etc (Martin, 2017). Many of these heroines have been hailed as a long-awaited refreshment in popular culture, redefining what it means to be a woman within television and popular culture, but they also raise a question:

“Does the fact that women use physical force equally as men and are more emotionally insensitive necessarily mean gender equality? Can they be equal to their male counterparts without taking on all their characteristics, such as aggressiveness, use of weapons, vindictiveness and power struggle? Will women necessarily emancipate themselves by copying stereotypical male patterns of behaviour, suppressing their feminine side?! (Sever Globan and Pavić, 2016, 148).

The shift that was started by *The X-Files* can be seen in the new generation of female characters that appeared on television, or more precisely, on the streaming platform Netflix (where television content can be watched online) (Mitova, 2022). If we briefly return to the archetype of the female warrior, the Netflix superheroine Jessica Jones from the eponymous show *Jessica Jones* (2015-2019) is praised for her serious approach to topics such as sexuality, rape and PTSD (Williams, 2018). Jessica is considered a “strong female character” (Galloway, 2018), and returning to the definition of a “strong female character” in “progressive” shows when such a character must be everything that the stereotypical woman is not: physically strong,

emotionally closed and presented to the audience as traditionally attractive (Moy, 2016), differences can be found between Jessica and her predecessors. Jessica is not a girlie like Buffy, nor is she “dressed in short skirts and skimpy costumes” (Sever Globan and Pavić, 2014) like Xena. She is rude, wears a black leather jacket and drinks too much. She is physically strong, but *Jessica Jones* does not possess the dimension that sexualizes the main female characters either inside or outside the show. The costume designer of the show, Elizabeth Vastola, states that “the women in the show dress for themselves. They do not dress for members of the opposite sex. They do not dress either for men or for anyone’s gaze. They dress for who they are and to feel good in their own skin”. *Jessica Jones* much more openly touches on the topics of interest for the third wave of feminism, so perhaps that is how she more easily acquires the title of a “feminist show”, especially because the show is created by a woman, Melissa Rosenberg. Moreover, in the second season the directors of all episodes were women. Because of that, *Jessica Jones* not only deals with topics that concern women, but also gives a voice to women in production and how these stories could be told (Gallaway, 2018).

The Netflix show *Orange is the New Black* (2013-2019), which deals with life in a women’s prison, was simultaneously praised for focusing on women’s stories, but also criticized for the stereotypes and violence with which it approached the issue of race and ethnicity (although the last season received praise for the response and purpose it gave to these complex narratives). *Orange is the New Black* dealt with a variety of characters and topics such as mental health, sexuality, gender, religion, trauma, aging, etc. Also, at least one episode was seen by 105 million Netflix subscribers, clearly showing that shows with female leads can attract a wide audience. Arielle Bernstein of *The Guardian* states that while shows like *Sex and the City* and *Buffy* have already shown what it means to be a woman in the world, *Orange is the New Black* stood out because it placed a significant focus on women from marginalized groups, “insisting for seven years on air that women’s stories are actually human stories and that women possess just as complex desires as men”. The characters from this show may not have all experienced a happy ending, but they were all portrayed as “fully realized people: complex, human, and worthy of a voice” (Bernstein, 2019). The show *Mr. Robot* (2015-2019) starring the hacker Elliot Alderson received similar reviews. The female characters in the show are not merely anxious

anti-heroines: just like the male characters, they can be aggressive, impulsive, short-sighted, idealistic and naive, i.e., complex and humane and capable of making mistakes. *Mr. Robot* also touches on some more specific feminist topics such as sexism in the workplace, sexuality, relationships, etc. However, this show is most noted for its portrayal of different characters with an ease that puts female characters on the same level as male characters and does not treat them differently (Cruz, 2015).

Although the feminism of all the above-mentioned shows continues to be questioned and analysed, it is important to return to Fiske and his claim that meaning is created in the process of reading. The empowerment of main heroines will not automatically make a show feminist. It is necessary to observe the narrative as well as the other characters in the narrative process (Moy, 2016):

“We believe that the path to gender equality also lies in cultivating diversity and own specificities, and not just copying those who have power and physical strength. This means that it is still necessary to portray women in different roles and with different characteristics in the media, and the ideal television heroine would be one who will not reach the goal using her naked body, be in repressive partnerships and silently suffer the brutal world that surrounds her. On the contrary, she should build and affirm a world without that much violence, just as her male counterparts should do” (Sever Globan and Pavić, 2016, 148).

As Australian theoretician of cultural studies Meghan Morris states, “dissatisfaction with the ‘everyday’ and overemphasised definitions of the everyday as ‘the way things are’” is the “minimal” characteristic of feminism (Morris, 2006. according to Grdešić, 2013, 34).

Conclusion

The power of the (television) spectacle as the most prominent feature of popular culture is evident today as much, if not more, than at the beginning of the expansion of the television media form in the 1960s. The society of the spectacle, as recognized by Guy Debord even then (1967), is perfectly suitable for ruling, as proven by the fact that those who aspire to power want to rule the society exactly as it is, and with the same actions

to keep it almost the same as it was (Debord, 1999: 00). Preferring an unchanging status, advocating minimal progress in society and maintaining the socio-political system as it is, the rulers will try to maintain it by forcing different forms of spectacle (sports, cultural, economic, especially those considering nationality). In Feuerbachian terms, as long as our era prefers the image over the thing, the copy over the original, representation over reality, and appearance over being, it is not difficult to maintain the *status quo* with the mechanisms of the spectacle that suits the authorities²⁷. Since its inception, television has been recognized as an extremely potent propaganda medium, and is therefore always under state supervision. On the other hand, television programs and their content are an important platform through which, in addition to mass culture products, pop culture products are offered and presented to a wide audience. These are places of cultural struggles, resistance to the forces of domination, and producers of new meanings. Popular television is one of the most creative and dynamic forms of the above. Television shows, especially after the 1990s, were highlighted as high-quality television content capable of creating and transmitting messages in which viewers will not only recognize sensation, fun and trendy *jouissance*, but very often Barthesian *plaisir* will prevail over the need to consume feelings and experience something ideal, and thus unrealistic realities.

As a rule, television shows are expected to show and represent situations from real life, the real world, everyday life, perhaps more than any other form of popular culture. Following the life of today's audience, television tries to monitor and thematize current social problems and changes that the society is going through, not only the trends in the sphere of entertainment. It also includes topics related to the development of society in different directions, including feminism and the position of women in society, enabling better insight and understanding the entire society, its problems and habits, and sometimes trying to offer answers to questions that are a step ahead of the times.

Popular television can also be viewed as a training ground for the development of feminism since the 1960s, where the trail has lead from soap operas and their most loyal viewers – housewives; through

²⁷ Public television is criticised on a daily bases today for making news programmes in particular that fulfil the needs of the ruling state structures.

popular-feminist creations of the 1990s such as *Buffy* and *Xena*; all the way to today's variety of female characters that include superhero shows like *Jessica Jones*, to shows with complex, diverse characters in all positions of power, like *Mr. Robot* and *Orange is the New Black*, some of which do not claim to be feminist shows at all, but they simply are.

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SNAGA TELEVIZIJSKOG SPEKTAKLA: FEMINIZAM I POPULARNA TELEVIZIJA

Sažetak

Popularna televizija je možda najvažniji alat za proizvodnju i promociju sadržaja popularne kulture. Snažno je mjesto otpora i prostor za različite kulturne borbe, uključujući i feminističku borbu koju promatramo kroz niz žanrova i likova koji se opiru ustaljenim definicijama ženstvenosti i tipičnih ženskih likova. Produkti popularne kulture, poput televizijskih sapunica, u posljednje vrijeme a i niz drugih žanrova, posebice onih koji ženske likove stavljaju u uloge heroína, omogućili su razvoj raznolike lepeze ženskih likova i svojoj publici dali mjesto gdje mogu pronaći autentične prikaze svojih identiteta i životnih iskustava. Kroz analizu ovakvih serija, ovaj će rad pokazati kako je popularna televizija, osnažena idealima feminizma, a prije svega popularnog feminizma, predstavila mnoge ženske likove široj publici, te je nedvojbeno postala jedno od primarnih mjesta ženske potrošnje popularne kulture.

Ključne riječi: feminizam, otpor, popularna kultura, televizija, ženski lik

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THE ROLE OF SOCIAL NETWORKS/MEDIA USE IN THE ACCEPTANCE OF ANTI-VACCINATION CONTENT²⁹

Scientific paper
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Abstract

After the first vaccines were developed, the global response to the COVID-19 crisis was focused on preventing infections. However, attempts to achieve a fully vaccinated population faced certain challenges, including doubt or complete rejection of scientifically established facts about the effectiveness of vaccines harbored by some people. In an effort to investigate and understand the factors associated with vaccine hesitancy, this paper examines recent findings about the role of social networks/media use and acceptance of anti-vaccination content during the pandemic in Croatia through a systematic literature review of pertinent research. In general, the literature review highlights the most important findings about the role of social networks/media use and acceptance of antivaccine content, but the results also highlight the limitations of the research. The objective of this literature review, focusing on articles published 2020-2022, was to provide deeper insight and understanding of the role of social networks/media in the context of the acceptance of anti-vaccination content, bearing in mind the analytical criteria of the literature review with respect to the research design and the methods used.

Keywords: anti-vaccination content, conspiracy theories, fake news, social media, vaccine hesitancy

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Introduction

The global pandemic disrupted everyone's social life. While lockdowns emphasized the role of social networks and media during the pandemic, tracking health information during the pandemic has gained a new momentum. The ongoing overload of information and disinformation regarding health issues drove the World Health Organization to introduce the concept of "infodemic". First coined to address the concerns over social networks and media use in connection with vaccine hesitancy during the pandemic, this concept raises questions about how the production and reproduction of information/misinformation shifted to the endorsement of anti-vaccination content online as well as vaccine hesitancy during the pandemic. The online circulation of anti-vaccination content is especially problematic in the COVID-19 context, since reliance on social media/networks for information and the frequency and usage of social media/network platforms are linked to negative vaccination intentions (Mascherini and Nivakoski, 2022; Allington *et al.*, 2021).

The importance of social networks/media is also evident in the fact that even highly credible social networks and media sources can spread misleading content such as misinformation and conspiracy theories (Enders, 2021; Jamison *et al.*, 2020). At the same time, social networks and media platforms, such as Facebook and Twitter, emphasize their role in the rapid dissemination of health information and misinformation to both the public and health professionals (Williams *et al.*, 2018; Smith, 2017; Dyar *et al.*, 2014).

During the pandemic, certain antivaccination narratives emerged on social media, such as the idea of a connection between the 5G network and the coronavirus (Lim, 2020). The idea of the theory about a connection between 5G and coronavirus is that Bill Gates deliberately caused the pandemic in order to create the conditions needed to control the population through the expansion of the 5G network (Shahsavari *et al.*, 2020). Narratives such as the one about the connection between the 5G network and coronavirus and other similar antivaccine narratives potentially endanger anyone searching for health information on social networks and influences their understanding and decisions regarding vaccines.

People engaging with social networks/media platforms in search of information on specific issues are becoming the focus of scientific interest, especially in terms of research regarding the link between social networks/media use and attitudes toward public health interventions in the context of COVID-19 (Cascini, 2022). Following the methodological principles of literature review papers pursuing similar objectives or research topics (Cascini *et al.*, 2022, Skafle *et al.*, 2022), this paper aims to analyze research papers regarding the role of social networks/media, vaccine acceptance/refusal, and the production/reproduction of anti-vaccination content to highlight different variables that contribute to the anti-vaccination narrative. Therefore, to properly elaborate the research questions and the idea behind the process of literature review, this paper will provide a short theoretical framework of relevant concepts.

Conceptualization of antivaccination content

The conspiracy theories, fake news, misinformation, and disinformation are all notions pertaining to the broader concept of anti-vaccination content. In this context, conspiracy theories are understood as alternative explanations of the officially published statement about an event, mainly starting from the assumption that there are secret societies or conscious manipulations by invisible powerful people who try to change or hide the truth of an event (Brotherton *et al.*, 2013.). In terms of information accuracy, fake news is defined as: “news that is false and could mislead readers” (Tandoc, 2017). Similarly, disinformation refers to intentional dissemination of fake or inaccurate information with the goal of misleading and/or deceiving, while misinformation is false content unintentionally shared by a person not realizing its false or misleading content (Shu, 2020).

This paper considers anti-vaccination content to be based on fear and distrust of vaccines, false statements or incomplete and partial information about vaccines that have no reference, or disinformation and conspiracy theories aimed at distorting scientific claims about vaccines (Wawrzuta *et al.* 2021; Kata, 2012; Bean *et al.*, 2011). In other words, anti-vaccination content includes vaccine-specific disinformation, misinformation, fake news, and conspiracy theories.

Toward an explanation of the relevance of the literature review

The intertwining relationship of social networks/media needs to be considered in order to understand their role in perpetuating and accepting anti-vaccination content. In other words, it is necessary to recognize the ability of social networks/media to change the way we consume and search for information, and the ability of individuals to change the content of social networks/media at the same time (Lim, 2020). Analyzing their role from such a perspective paves the way for new research efforts whose objective is to explore the robust link between social media use and acceptance of anti-vaccination content in a way that includes mutual dynamics of social media-user relationships.

Exploring the role of social networks/media in perpetuating antivaccination content, some authors point out the algorithmic functions of social networks. Algorithmic functions generate content using the probability that the consumer will engage with the content of interest or using emotional reinforcement, generating biases that make antivaccination content more visible and likely to be circulated (Lim, 2020). The understanding of algorithms as autonomous content distributors is not fully grounded in evidence, since users, despite algorithmic functions, have the agency when deciding which content to engage with (Lim, 2020). Research into the impact of algorithmic functions can seek to answer the question which content is most likely to be displayed to the user while searching for specific topics on social networks/media platforms (Hussein, 2020).

On the other hand, some research into the relationship between social networks/media and acceptance of anti-vaccination content will focus on sociocultural or individual characteristics such as conspiracy thinking or institutional distrust (Chen *et al.*, 2022; Enders *et al.*, 2021). Regarding individual characteristics, the assumption is that they can determine the motivation to search and accept content on social networks/media (Iyengar and Hahn, 2009). In addition to studies that have underlined conspiracy thinking as an important factor contributing to the acceptance of vaccine conspiracy theories on social networks/media, there are also studies that have linked the endorsement of anti-vaccination content and the preference for networks/media as a source of information to specific groups such as parents (Smith *et al.*, 2022; Enders, 2021).

Social networks/media distinction

Since there is a whole range of conceptualizations in existent literature, this section introduces a brief overview of the conceptual distinctions and challenges around such distinctions. While social media is defined as internet-based applications built on Web 2.0, allowing the creation and exchange of user-generated content (Kaplan and Haenlein, 2010), social networks are defined as application systems that offer functionalities for identity management and for keeping in touch with others (Richter, 2008). Both concepts are often treated as synonymous, even though not all social media are social network sites (Carr & Hayes, 2015, according to Rhee, 2020).

This distinction may seem self-evident, but confusion can arise when categorizing certain social media platforms and social networks. For example, Tik Tok disseminates the content produced by its users, but it also has a networking and liking functions that are characteristics of social networks. Similarly, YouTube, Facebook, and Instagram are all content production/networking platforms, while Twitter and LinkedIn are a better fit the definition of pure social networks. In addition, digitalized forms of newspapers or blogs provide the possibility for users to create an account, connect with other profiles, and comment, which are all typical social network activities. In this regard, some authors suggest the concept of “social media networking”, which incorporates both (Kane *et al.*, 2013).

In this paper, the term social networks/media refers to all internet-based applications and websites designed for the production/reproduction and distribution of both user and media generated content that also offer communication and networking features. Nevertheless, since internet portals and digital news include the features of social networks/media, such as the ability to share content, or even create an account within its platform to communicate within its online network, they will also be included in the examination of the role of social networks/media, even though they fall into the much broader concept of digital media.

Methods and data collection

This paper seeks to answer the following research questions: Which conclusions can be made about the role of social networks/media in the perpetuation of antivaccination content in the COVID-19 context based on analyzed research papers? Which questions did each article seek to answer, and what are their most relevant findings?

To answer the research questions, the author applied the method of literature search using the Google Scholar search engine to collect data. The criteria for the literature search included the time frame of 2020-2022 in order to focus on the context of the pandemic. Only scientific papers and original scientific articles were selected. Master thesis and conference reports were excluded from the analysis.

The search included the following keywords in the and/or combination: antivacc*; vaccine conspiracy; vacc* fake news; vacc* disinformation; social media; social networking; digital media. The author screened 129 collected articles to determine whether their research topics are appropriate for further analysis focusing on anti-vaccination content (such as conspiracy theories, fake news, or disinformation) on social media or social networks. After removing duplicates and articles that did not meet the criteria for inclusion, 35 papers remained for the analysis. Next, the authors eliminated articles that were not Croatian or were not aligned with the problematization of social networks/media role and endorsement of antivaccination content, which left them with 14 articles for analysis.

Coding process

Each unit of analysis was coded through the NVivo program in accordance with the code sets presented below. Having in mind the research questions and the objective of this literature review, a codebook that included basic article information such as published date, field of study, and research design was used in the coding process. The field of study was determined by subjective estimation based on the institutional origin of most authors. In cases where research was empirical, coding was used to capture the method of data collection and sampling techniques as well as the method of data analysis.

The last part of coding was set to determine the most relevant findings for the purpose of providing a broader understanding of social networks/media role. Finally, the focus of the analysis was: a) to determine whether there is a correlation between media use and acceptance of antivaccination content; b) to see if results indicate sociocultural variables correlated with the social networks/media use and acceptance of anti-vaccination content; c) to see if there are correlations between media features, media use and acceptance of anti-vaccination content, d) to extract recent and relevant findings about social networks/media role regarding endorsement of anti-vaccination content.

Results

The report of this research will include a graphical presentation as well as an elaborative table presentation including basic paper info, study design info, sampling, methods, objectives and relevant findings.

Basic article information. Regarding the research field, most articles come from communication studies, which were all published in 2021. Public health is the second leading research field, which had the most published articles through 2022. Media theory is the third research field with three articles published in 2021, as well as 2022.

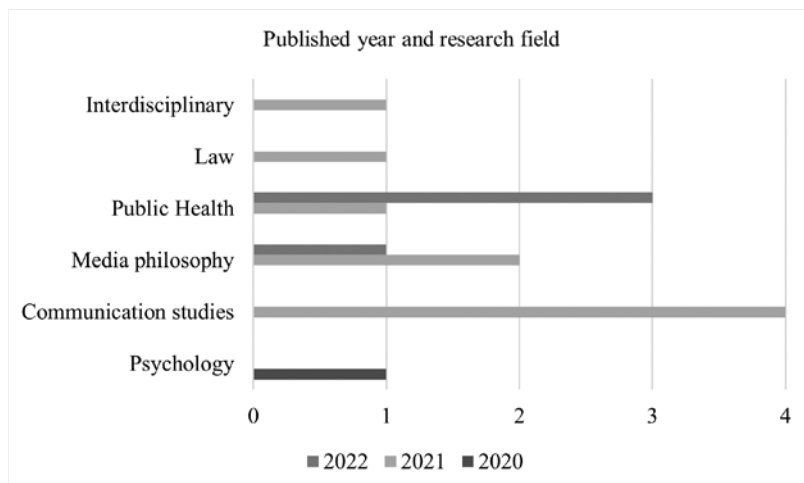


Figure 1. The research field of articles published per year 2020-2022.

While the largest number of analyzed papers fall into the category of national research (10), four were cross-national, either empirical (3) or literature review (1).

Research goals vary across different research designs, but they are all set within the role of social networks and media. Therefore, they can be summed up as: assessment of COVID-19 misinformation, fake news, or conspiracy theories on social networks/media platforms; assessment of attitudes regarding social networks/media; preferences of media use when searching for information, the role of social media within vaccine hesitancy, as well as an examination of content on social networks and media platforms regarding antivaccination content.

Methodological approach. A diverse research approach is noticeable. Quantitative research is predominant (7), followed by qualitative papers (4). Other papers are theoretical (2) and literature reviews.

Research design. Regarding predominantly quantitative research and data collection, online survey methods are most commonly used, while data analysis consists of regression or correlation. Qualitative research includes focus groups (1) and content analysis (3). Among other papers, a literature review (1) and theoretical papers (2) were noticed, which include thematic analyses of concepts and discourse analysis, while the literature review consists of an integrative data collection approach.

Sampling is also as diverse as research design. Unusually, non-probabilistic sampling using the snowball method is prevalent in quantitative research. Some are specifically focused on the student population or librarian workers in formal education. Content analysis is focused on articles on internet portals, as well as social networking platforms.

Conceptualization. It is of notice that most of the empirical research papers used a theoretical framework as a result recap of previous research. Some papers contained partial conceptualization, for example, papers would contain mentions of digital or online or social media or social networks within their theoretical framework as if those concepts are self-explanatory. This might seem practical but poses a challenge if one wants to avoid mixing the meaning of the concepts, which may happen for example, if one talks about features of digital media and then constrains the concept to social network platforms like Facebook.

Of explained concepts, media literacy is understood as citizens' ability to encounter, analyze, and accumulate information for specific objectives (Ciboci Perša *et al*, 2021). Disinformation is explained as deliberately created false content that is promoted with the intent to mislead someone (Wardle, 2019, as cited in Ciboci Perša *et al*, 2021; Kurelović, 2021). A similar conceptualization of fake news is noticed by describing it as the deliberate and tendentious presentation of false or misleading claims with the aim of influencing and manipulating the cognitive processes of the target audience (Bezinović *et al*, 2021). Others describe fake news as information that does not correspond to the fact (Kurelović, 2021).

Some elaborate conspiracy beliefs as an explanation of events which mostly incorporate beliefs about a small group of powerful actors working secretly for their own benefit and against the common good (Mulukom, 2020). Zeman *et al* (2022) highlighted the challenge of defining the previously mentioned concepts by acknowledging the results of a literature review analyzing conceptualizations in other papers. The same authors cite papers that consider fake news as a classification of misinformation, disinformation, and mal-information, with authors elaborating on each concept.

Findings

Social networks/media as the main information source have been most noticed in a few types of research. Several findings suggest that most participants used the internet as the main source of information during the COVID-19 pandemic (Begović and Labaš, 2021). They also highlight that majority of the participants encountered some form of fake news or conspiracy theory when using the internet during the pandemic. Social network platforms have been cited as the main information source in the research of Di Giorgio *et al* (2021). Results indicated preferences for social network platforms as the main source of information when searching about COVID-19, but also showed that participants who used social networks, internet blogs/forums, and friends/acquaintances as their sources of information had a higher probability of being unvaccinated (Mascherini and Nivakovski, 2022). Social media as the main source of information was also highlighted in analyzed theoretical papers which referred to

social media as “windows into the society” during the pandemic (Šušnjara and Vejić, 2021; Tkalec and Kocijan, 2021).

Social media as a disinformation source has been reported via research on media literacy among library workers in formal education. Serious consequences of preferring social networks as the main source of health information can be found in results that highlight social media as a factor of vaccine hesitancy among those who use it for more than 3 hours per day as well as among those who prefer social media as the main information source (Mascherini and Nivakovski, 2022).

Social (dis)trust associated with the endorsement of antivaccination content on social networks/media was reported, such as trust in sources of information, as well as distrust in the government predicting endorsement of conspiracy theory beliefs and conspiracy thinking (Mulukom, 2020). A focus group with vaccine-hesitant persons also reports that those who disregard the mainstream sources of information consider the internet a source of reliable information (Pavić *et al*, 2022).

Features of social networks and media platforms were not the focus of any research specifically. Some papers report on frequent discourse themes within digital newspaper articles (Tkalec and Kocija, 2021), which can be interpreted within virality as features of social media and networking platforms. Another mentioned feature, such as shareability, is highlighted by findings about celebrities functioning as sharers of fake news to consumers of online content (Zeman *et al*, 2022).

Table 1. Literature review

Paper	Research aim	Methodological approach	Findings
Mulukom (2020)	To assess how information predicts COVID-19 protective behavior and how information is obtained	Quantitative online survey research, (N=7.755)	COVID-19 conspiracy thinking is predicted by distrust in all forms of media and trust in social media. COVID-19 conspiracy beliefs associated with the idea that the media overplays the virus, while perceived knowledge was associated with the idea that the media underplays the virus.

Begović and Labaš (2021)	To examine the role of the media as an important source of information in the age of the coronavirus pandemic	Quantitative online survey research (N=585)	Internet and social networks are often used in the process of searching for information, despite the respondents' perception of the high amount of fake news and conspiracy theories. Most participants used the internet as the main source of information during the COVID-19 pandemic. More than half of the participants encountered some form of fake news when using the internet as a source of information.
Lesinger G. (2021)	To assess proportions of misinformation about COVID-19 virus on digital media	Thematic content analysis (N=46)	Uncritical reporting of news was detected as well as distortion of (mis) information when reporting about virus.
Bezinović <i>et al</i> (2021)	To assess proportions of misinformation about COVID-19 virus on digital media	Quantitative online survey research (N=108)	The results showed that most respondents have been following portals since the outbreak of coronavirus in Croatia.
Ciboci <i>et al</i> , (2021)	To detect media literacy of librarians in formal education and to assess their perception of disinformation on digital media	Quantitative online survey research	Library workers in formal education cite social network platforms as a source of coronavirus disinformation.
Derenčinović D. (2021)	To provide elaborative conceptualization within law perspective	Theoretical	Discussion of the legislative and institutional framework of electronic media, and the interplay of social media use and freedom of speech, including fake news content. The author concludes that the overcriminalization of social network platforms is not a viable model.

Tkalec G. and Kocijan S. (2021)	To detect intertextuality and intermediality in digital media content spreading when informing about pandemic occurs	Intertextuality and intermediality content analysis	Textual messages from different articles became frequent during the pandemic: “stay home”, “be responsible”, and “new normal”. Highlighting the role of the media and social network platforms as spreaders of panic, but also as pillars and allies of crisis communication.
De Giorgio <i>et al.</i> (2022)	To assess practices and attitudes about SARS-Cov-2 and related COVID-19 diseases and optimism, depression, anxiety and stress levels	Quantitative online survey research (N=1993)	Social networks are the preferred information source of participants when searching for COVID-19 information. Also, participants whose sources were social networks, general internet blogs/forums and friends/acquaintances had higher odds of being unvaccinated.
Kurelović (2021)	To assess students' preferences of media when informing and to assess their ability to recognize Covid-19 conspiracy theories	Quantitative online survey research (N=29)	Social networks are the most common method of informing within COVID-19 context. There is a statistically significant difference between the perception of abilities for detecting fake news and score assessment of COVID-19 fake news.
Šušnjara and Veljić (2021)	To provide an elaborative conceptualization of media role	Theoretical	Theoretical work discusses both the negative and positive role of social media in fighting vaccine-specific conspiracy theories, but the emphasis is on the possibility of positive outcomes of public health campaigns' communication campaigns via social media.
Mascherini and Nivakoski (2022)	To explore how social media influences vaccine hesitancy	Quantitative online survey research (N = 46.800)	A sizeable difference in hesitancy rates between people who use social media or blogs as their main source of news, in comparison with people who use the press as their main source of news. Individuals who use social media more than 3 hours daily are more vaccine hesitant.

Smith <i>et al</i> , (2022)	To explore and analyze the literature describing the vaccine decision-making of vaccine-hesitant pregnant women and parents of preschool children	Integrative literature review	Parents do their own search for information, mostly via social media that the authors link to vaccine refusal. Also, the search for information in non-traditional sources is linked to the acquisition of misinformation, exposure to conspiracy theories, and subsequent vaccine refusal.
Zeman <i>et al</i> (2022)	To examine texts in social media on various statements by celebrities about COVID-19, published on two web portals in Croatia	Discourse analysis	Celebrities function as very potent sharers of fake news since consumers of online content give great weight to their actions and statements. Mainstream media often act as a corrective to social media, in their efforts to convincingly deny fake news and the celebrities that share them on social media.
Pavić <i>et al</i> (2022)	Exploring reasons for vaccine hesitancy	Asynchronous focus groups (N=40)	Vaccine-hesitant persons relied more often on the internet as the source of reliable information, sometimes even declaring that the internet provides a space where laypersons and experts who disregard the mainstream sources of information can voice their opinions.

Discussion

To answer the research question of the literature review regarding research design, most of the papers are based on a quantitative methodological approach. Furthermore, within quantitative research, snowball sampling can be noticed in most papers. It is assumed that the choice of snowball sampling in quantitative research is based on a critical evaluation of the best sampling method considering the research theme. An elaboration of the reasons why such sampling was used would help future researchers make similar decisions in applicable research situations. Since online research is prevalent, a conclusion can be made regarding the representativeness of data. Furthermore, there are noticeably fewer qualitative papers. It can

be assumed that it was and probably still is challenging to conduct qualitative research during a pandemic, since qualitative data collection mostly demands face-to-face interactions with participants. The same can be concluded regarding the predominantly quantitative online surveys with snowball sampling, having in mind the complexity of conducting research during official pandemic measures. Data collection during the pandemic has been problematized in one qualitative paper which elaborates on the decision to do online asynchronous focus groups during the pandemic (Pavić *et al.*, 2022).

Findings regarding the research objective of each study suggest that all research goals are set within the role of social networks and media. However, there is variation in the ways of the research context and theme in which the achievement of an objective is set. Such variation in research objectives also points out that the role of social media use and endorsement of antivaccination content is complex and should continue to be examined in a way that includes different research objectives or broader research design. In line with the above research differentiation, it has been noticed that articles come from different research fields. Most articles come from communication studies, with public health as the second most represented research field, and media theory as the third most represented field. Also, papers that come from public health research are published in 2022, and it can be assumed that the public health research field will rise as the COVID-19 pandemic continues.

To highlight the most important findings of the papers, it can be said that the analyzed papers refer to social networks/media as the main source of (health) information during the pandemic (De Giorgio 2022; Pavić *et al.*, 2022; Smith *et al.*, 2022; Kurelović, 2021). The importance of social networks/media in the COVID-19 context was especially highlighted in the metaphor “windows into the society” (Šušnjara and Vejić, 2021; Tkalec and Kocijan, 2021). This has been more evident during the lockdowns, when most activities and interactions shifted online when all activities and major gatherings were restricted due to the formal epidemic measures. Nevertheless, the use of social media is not the sole predictor of acceptance of anti-vaccination content. We all use social media, but not everyone accepts antivaccine content as a valid source of information. The findings of some authors suggest that there are other sociocultural and individual characteristics that can be associated with the endorsement of

antivaccination content online such as conspiracy thinking or (dis)trust of certain institutions (Mulukom, 2020). Having in mind the intertwining relationship between the use and the role of social media/networking and the acceptance of antivaccination content, it is important to highlight that although the above research papers help us understand this relationship, there is room for future research, especially regarding the representativeness of the sample or the conceptualizations within the theoretical framework of research to avoid any conceptual ambiguity. Additionally, findings of the literature review show that social network/media features were not the focus of any research specifically. Although they are not the main focus of any research, the findings of a few papers point to the interpretation and reflection on the characteristics of social networks (Zeman *et al*, 2022; Tkalec and Kocijan, 2021). Such findings indicate the importance of further assessment of the impact of social network/media features regarding the acceptance of anti-vaccination content. Additionally, research conducted in Croatia highlights similar findings as research papers conducted in other European countries, UK, and the USA (Mascherini and Nivakoski, 2022; Allington *et al*, 2021).

However, while literature review findings are complementary with the earlier mentioned problematization of the social networks/media role and acceptance of the anti-vaccination content, as well as with the findings of research conducted outside of Croatia, the limitations of this literature review should be highlighted. Firstly, the literature review included only papers accessible through Google Scholar, which reduces the scope of included papers by excluding those published in other databases or unavailable at the time of this literature review. Secondly, the literature review captured articles with predominantly online research, which is expected regarding the ongoing pandemic, but limitations of the findings should be highlighted regarding population groups without online access.

This review was conducted with the idea to provide recent findings and to broaden the understanding of the association between the role of social networks/media use regarding the acceptance of antivaccination content. By including only papers published during the pandemic, efforts have been made to highlight the most recent findings relevant to the pandemic context in Croatia. The idea to sum up what has been acknowledged in recent research comes with the aspiration that this literature review will serve as a starting point in learning about the complex relationship

between social networks/media use and acceptance of anti-vaccine content. Additionally, research on the relationship of social networks/media and acceptance of anti-vaccination content is especially important considering vaccine hesitancy.

Conclusion

Overall, the internet, social networks, and media platforms are cited as the main informational source during the pandemic in Croatia (Mascherini and Nivakoski, 2022; Begović and Labaš, 2021; Di Giorgio *et al*, 2021). Furthermore, reports show that people who used social networks or internet blogs/forums as their main source of information had a higher probability of being unvaccinated and at the same time vaccine-hesitant individuals prefer alternative sources of information such as social networks/media (Mascherini and Nivakoski, 2022; Pavić *et al*, 2022). Additionally, social media is highlighted as a factor of vaccine hesitancy for individuals who spend most of their time online and prefer social networks/media as their main source of information (Mascherini and Nivakoski, 2022). Endorsement of antivaccination content on social networks/media is positively associated with social distrust, while distrust in the government predicts a higher probability of endorsement of conspiracy theory beliefs (Mulukom, 2020). Such findings can be summed up in the metaphorical description of the role of social networks/media as “windows into the society” (Šušnjara and Vejić, 2021; Tkalec and Kocijan, 2021), which is especially noticeable since the beginning of the pandemic.

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ULOGA DRUŠTVENIH MREŽA/KORIŠTENJA MEDIJA U PRIHVAĆANJU SADRŽAJA PROTIV CIJEPLJENJA

Sažetak

Novonastala globalna zdravstvena kriza uslijed pandemije, popraćena je naporima da se uspješno spriječi širenje zarazne bolesti COVID-19. Unatoč naporima, pojavili su se izazovi u ostvarenju poželjnih razina procijepljenosti stanovništva koji jednim dijelom proizlaze iz akumulacije sumnji u učinkovitost i sigurnost cjepiva. S ciljem razumijevanja faktora koji se mogu povezati s oklijevanjem prema cjepivima, dio istraživačkih radova usmjeren je na istraživanje uloge društvenih mreža/medija. Ovim će se radom pokušati istaknuti sva relevantna saznanja akademskih radova na ovu temu. Za metodu rada odabrana je sustavna analiza istraživačkih radova u period od početka pandemije do danas. Uzimajući u obzir relevantna istraživanja, radom se pruža dublji uvid i razumijevanje uloge društvenih mreža/medija u prihvatanju antivakcinacijskog sadržaja.

Ključne riječi: sadržaj protiv cijepljenja, teorije zavjere, lažne vijesti, društveni mediji, oklijevanje oko cjepiva

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TECHNOLOGY ACQUISITIONS AS THE NEW POWER. AN APPROACH ON HOW GAFAM³¹ HAVE MANAGED TO WIN THE WAR FOR INNOVATION, THE WAR FOR PATENTS, THE WAR FOR TALENTS, AND THE WAR FOR DATA

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Abstract

Looking at the global technology acquisitions over the past 20 years, it becomes clear that a major share of these transactions is made by the US-based “Big 5” technology companies (also known as GAFAM – Google, Amazon, Facebook, Apple, and Microsoft).

Given the market power of GAFAM (Dolata, 2017), which is evident not only in form of market capitalization, revenues, and profits, but also in the other dimensions of competitive strategy – such as innovation, patents, talent/people, and data, – it seems interesting to examine whether one of the main reasons for the overwhelming power of these companies is their obvious and almost unlimited ability to make technology acquisitions.

Against the background of the umbrella theme of the conference “POWER”, it is thematically and methodologically suitable to conduct a thought experiment based on the theoretical concept called “Concept of Strategic Power” (Scholz, 1987; 2001). This approach considers power as an interplay of strategic capabilities, strategic movements and strategic barriers and allows an evaluation of strategic power as a source of competitive advantage and market success (Scholz, 2001).

The results show that GAFAM’s high acquisition power enables it to make any acquisition it wants and thereby trigger strategic movements. These produce the inter-

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31 Due to the term GAFAM, Google and Facebook are referred to in the relevant places throughout the article, although Google has meant Alphabet Inc. since 2015 and Facebook has meant Meta since 2021.

dependent and self-reinforcing effect of gaining strategic power to win the war for innovation, the war for patents, the war for talent, and the war for data.

Big Tech, GAFAM, M&A, Strategic Power, Technology Acquisitions

Technology Acquisitions As The New Power. An Approach On How GAFAM³² Have Managed To Win The War For Innovation, The War For Patents, The War For Talents, And The War For Data.

GAFAM and the “Concept of Strategic Power” – a thought experiment

Looking at the global technology acquisitions over the past 20 years, it becomes clear that a major share of these transactions is made by the US-based “Big 5” technology companies (also known as GAFAM – Google, Amazon, Facebook, Apple, Microsoft). If the focus is limited to large-volume deals and the so-called emerging technologies in particular, the picture becomes even more striking (Giacomo and Kepalaité, 2018; Alcantara, Schaul, De Vynck and Albergotti, 2021; Ciepluch and Eisenbeis, 2022).

Given the market power of GAFAM (Dolata, 2017), which is evident not only in form of market capitalization, revenues, and profits (all of which seem to be rising endlessly at an already high level), but also in the other dimensions of competitive strategy – such as innovation, patents, talent/people, and data, it seems interesting to examine whether one of the main reasons for the overwhelming power of these companies is their obvious and almost unlimited ability to make technology acquisitions.

Against the background of the umbrella theme of the conference “POWER”, it is thematically and methodologically suitable to conduct a thought experiment based on the theoretical concept called “Concept of Strategic Power” (Scholz, 1987; 2001). This approach considers power as an

³² Due to the term GAFAM, Google and Facebook are referred to in the relevant places throughout the article, although Google has meant Alphabet Inc. since 2015 and Facebook has meant Meta since 2021.

interplay of strategic capabilities, strategic movements and strategic barriers and allows an evaluation of strategic power as a source of competitive advantage and market success (Scholz, 2001).

This article therefore aims to make a conceptual attempt to examine the success of GAFAM – both in terms of general market success and within the specific markets of innovation, patents, talent/people and data – based on the so-called “Concept of Strategic Power”. In order to approach the origin of strategic power, it is assumed that the starting point of the argumentation is GAFAM’s acquisitions in companies and startups in general, and (emerging) technology companies and startups in particular.

The “Concept of Strategic Power” – the theoretical approach

Even though the “Concept of Strategic Power” is already dated, it is still suitable for the analysis of the problem raised here against the background of the conference topic. Moreover, the components of the model – especially in the field of research on core competencies (Prahalad and Hamel, 1994; Bouncken, 2000; Byrd, 2001) and dynamic capabilities (Teece, Pisano and Shuen, 1997; Winter, 2003; Lawson and Samson, 2001; Yeow, Soh, Hansen, 2017) – have evolved until the recent past. In this light, the approach is considered quite fruitful in providing an up-to-date contribution to the current discussion.

The “Concept of Strategic Power” (Scholz, 1987; 2001), which underlies the thoughts presented here, is based on the interplay of

- strategic capabilities (Chandler, 1992; Prahalad and Hamel, 1994; Bouncken, 2000; Byrd, 2001),
- strategic movements (Porter, 1980; Bruijl, 2018), and
- strategic barriers (Porter, 1980; Pehrsson, 2008),

which serve the strategic power development and thus become the strategic power of a company – from which competitive advantages in the sense of market and entrepreneurial success arise.

There are six interdependencies between the three components mentioned, as each component depends on the other (figure 1):

1. Strategic movements cause the development of strategic capabilities.

2. The effect of strategic capabilities on strategic barriers results from the fact that the level of strategic barriers is (partly) determined by the underlying strategic capabilities.
3. High strategic barriers constrain strategic movements because the existence of the barrier makes it difficult to transform a strategic movement into strategic power. Low barriers and thus strategic unprotected areas, on the other hand, provoke strategic movements.
4. The influence of strategic movements on strategic barriers consists in the selectivity and speed of barrier building and/or overcoming and breaking of barriers.
5. Strategic barriers influence the input and output rates that ultimately build, maintain, rearrange or dismantle strategic capabilities.
6. Strategic capabilities also influence strategic movements. Particularly strong strategic capabilities stimulate the initiation of a strategic movement making use of this capability.

This interplay of strategic capabilities, movements and barriers is defined as a strategic power (figure 1). The “Concept of Strategic Power” is particularly well applicable (as will be shown later) in the context of markets (or industries) characterized by the principles of the information economy (e.g., economies of scale, network effects, winner-takes-all-markets, etc.).

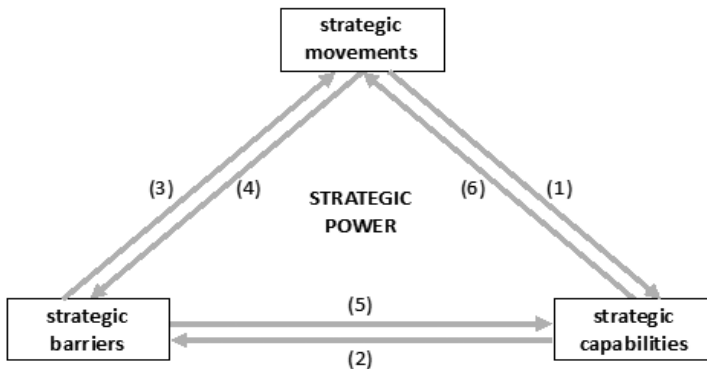


Figure 1: The “Concept of Strategic Power”

Following the approach, the absolute strategic power, which depends on the strategic potential and the strategic movements of the company as well as the building up of barriers (against the competition) and the breaking down and overcoming of barriers (against the company), must also be distinguished from the relative strategic power. The latter results from the ratio of the absolute strategic power of the company to the absolute strategic power of the company's competitors. The result of this comparison (the relative strategic power) ultimately determines the success of the company (Scholz, 1987; 2001).

GAFAM as dominant players in the digital business – the object of investigation

The “Big 5”, also called GAFAM – as an acronym for the five most popular US-tech companies: Google (since 2015: Alphabet), Apple, Facebook (since 2021: Meta), Amazon and Microsoft –, have become very successful since their foundation. A brief look at pure facts and general business KPIs (Kolloge and Sievers, 2021) shows their impressive market success (table 1).

With their respective market capitalization of over US \$1.5 billion each, Google, Apple, Amazon and Microsoft are ranked amongst the five most valuable companies in the world on a regular basis (status as of 2021), Facebook is still in the top 10 (status as of 2021) with a market capitalization of just under US \$1 trillion. In total, these five companies have four times the value of the market capitalization of the entire companies in the German Stock Index DAX (40 companies). In other words, the five companies are four times as valuable as the 40 (largest) German companies combined. In terms of the most valuable brands (brand value), Apple, Google, Amazon and Microsoft are ranked 1st to 4th worldwide, Facebook is in 8th rank (Statista, 2022).

Table 1: GAFAM in numbers

	Year of Foundation	Year of Going Public (IPO)	Number of Employees (end of 2020)	Total Revenue in 2020 (in billion US \$)	Net Income in 2020 (in billion US \$)	Market Capitalization (in billion US \$)	Brand Value (in billion US \$)
Google	1998	2004	135,301	183	40.3	1,527	208
Apple	1976	1980	147,000	275	57.4	2,200	241
Facebook	2004	2012	52,535	86	29.2	890	70
Amazon	1994	1997	1,298,000	386	21.3	1,661	135
Microsoft	1975	1986	166,475	143	44.3	1,951	163

Looking at the market shares of the companies in the individual markets in which they are active, their dominant positions become apparent (Spiegel and Waldfogel, 2021; Kolloge and Sievers, 2021): In the search engine market, Google has a market share of around 90% (together with Microsoft, this adds up to almost 95%). In the computer operating systems market, Microsoft (75%) and Apple (15%) dominate with a combined market share of around 90%, and in the mobile operating systems market, Apple (around 30%) and Google (around 70%) together have almost 100% market share. When it comes to social media platforms, Facebook dominates the market with Facebook, Instagram and WhatsApp – at least in the Western world. For intelligent virtual assistants, Google (30%), Amazon (20%), Apple (30%), and Microsoft (15%) also jointly achieve almost 100% market share.

After considering rather general success and market performance figures, it is worth looking at specific markets: The source for generating big data (war for data) is e-commerce and digital advertising. Amazon's market share in US retail e-commerce is almost 40%, which is almost 10% more than the 14 top US retailers combined (Lebow, 2022), worldwide, the share is almost 15% (Statista, 2021). And in digital advertising, Google, Amazon, and Facebook account for two-thirds of global revenues (Lebow, 2021). With regard to the employer market (war for talents), it is also evident how successfully the GAFAM companies are positioning themselves: In the World's Best Employers 2021 ranking (published by Forbes), Google, Apple, Amazon and Microsoft are in the top 10 (Todd, 2021). In the Trendence Institute's employer ranking, these four companies are ranked

1 to 4 (Google, Apple, Amazon, Microsoft) in the field of computer science (Trendence, 2022a), while three (Apple, Google, Amazon) are in the top 10 in the field of economics/management (Trendence, 2022b). GAFAM also have concentrated control over vast intellectual property (war for patents). According to CBIInsights (2017) and Mirrlees (2021), GAFAM are some of the world's largest patent holders (in 2019) in technology fields like artificial intelligence, cyber security, autonomous vehicles, augmented and virtual reality and health: Google (21,084 patents), Amazon (9,455 patents), Facebook (3,716), Apple (14,849), and Microsoft (29,824). Between 2019 and 2020, GAFAM accumulated a record number of new patents. Finally, it comes to acquisitions (war for innovation): In digital markets in particular, however, innovation is not only driven by technologies, but rather generated primarily through technology investments and acquisitions (Deller, Doan, Mariuzzo, Ennis, Fletcher and Ormo, 2021; Dolata, 2017). GAFAM companies are accountable for an enormous and constant number of acquisitions: Depending on the research (and thus the way acquisition activities are counted), these companies accomplished 175 mergers from 2015 to 2017 (Gautier and Lamesch, 2021), acquired more than 400 companies from 2010 to 2020 (Affeldt and Kesler, 2021), or made more than 700 acquisitions from 1998 to 2018 (Genzinu and Kepalaité, 2018). This trend seems to not only continue but also even to gain momentum according to Jin, Leccese and Liad (2022): GAFAM are recently acquiring more companies in a shorter period of time than ever before. According to Dolata (2017, 18) the characteristic of GAFAM companies' innovation and expansion strategies can be summed up as "acquisition instead of cooperation". In other words, innovation is driven through the acquisition of companies whose resources and competences are integrated into GAFAM corporations.

Mechanism of developing strategic power in innovation, patents, people and data – the interdependent effects

As described in the previous section, acquisitions in technology startups and companies can be considered as a strategic competitive action, and thus as strategic movements. Taking these strategic movements as a starting point and apply the "Concept of Strategic Power" to the strategically important areas of innovation, patents, talent, and data – once clockwise

(arrows/effects 1 to 3 in figure 1) and once counterclockwise (arrows/effects 4 to 6 in figure 1) – the following effects emerge:

1. Strategic movements (technology acquisitions – for example, at an early or late point in time, broadly spread or focused) make it possible to expand strategic capabilities and/or build up new ones.

Innovation: Technology-driven innovation leads to product, process, organizational or marketing innovation at the company level (OECD/EUROSTAT, 2018; Eisenbeis and Ciepluch, 2021), which can build strategic capabilities.

Patents: Technology acquisitions are often made to secure patents and intellectual property rights. Patents and rights are often the central (intangible) assets and – depending on their uniqueness and exclusivity – lead to the development of new strategic capabilities.

Talents: Acquisitions and mergers are often an instrument for building up and/or expanding new core competencies and thus new strategic competencies through the know-how (often technology know-how) that is tied to people. Particularly in highly technology-dependent market fields, these strategic capabilities – people, talent and know-how – represent competitive advantages that are crucial for success.

Data: Having a lot of data, having the right data and being able to use it, is the number one competitive advantage in a data-driven, digital economy. Since this triad (big data, right data, and usable data) is technology-dependent, appropriate technology acquisitions can be utilized to build up or to (further) develop strategic capabilities.

2. Expanded and/or new strategic capabilities make it possible to build up strategic barriers for (potential) competitors and/or to raise existing barriers. At the same time, existing barriers can be overcome with expanded or new strategic capabilities.

Innovation: Once (new) strategic capabilities have been developed or expanded – through technology-driven innovation, as product, process, organizational or marketing innovation – there is the opportunity to use these capabilities deliberately and selectively to raise or lower barriers.

Patents: Unique and exclusive patents and rights – or at least rare and marketable patents and rights – are a strategic capability in technology-dependent fields in particular, and even more in the technology sector itself, and represent barriers to market entry, but also a suitable vehicle for overcoming barriers.

Talents: The lack of know-how, the right people, the talent is – today more than ever – a prohibitive market entry barrier. Those who have the appropriate strategic capability “talent” can overcome this market barrier, but at the same time also raise the barrier for others, for example by shortening the availability of high potentials.

Data: If you have data sovereignty or superiority in terms of data, this is a strategic capability that is crucial for success nowadays. This can be both a high barrier to market entry for others and a powerful factor in overcoming market barriers – the latter even in markets that were previously not accessible.

3. Barriers that can now be overcome enable new strategic movements; at the same time, strategic barriers that have been tightened (for/against others) and/or newly created allow the company more freedom in its strategic movements, since the risk of new competitors is or becomes smaller due to the now higher barriers.

Innovation: Striving for innovation (as a completely new strategic movement) is possible in areas or markets in which barriers have now been overcome. Technologies can now be further developed until they are ready for productive use or until the investment is amortized, and the technological lead can be extended. If one’s own engagement in a specific (technology) market is stabilized or protected by barriers that have now been erected, there is greater freedom of resource allocation on the other side, and further strategic movements into other areas and markets become possible – for example through resources for further technology investments.

Patents: Increased market barriers for others now make it possible to use the patents and rights in the sense of further strategic movements, for example to license these to other companies and thus open up a new business field or a new source to generate revenue. This and (as with innovations) the greater freedom of allocation

now enables further acquisitions to be made in (other) patents and rights.

Talents: Same within the “talent” area. The higher market barriers for others, as well as the new and, above all, more flexible strategic movements allow new ways of dealing with personnel strategies, for example further acquisitions of talent. In new areas and markets where barriers now have been overcome, new paths (strategic movements) can be taken with this scarce resource of personnel and the corresponding know-how, for example in the area of technology research and development.

Data: Particularly in the area of data (and information), barriers built up for others have an effect in the sense of network effects and self-enforcing mechanisms, the so-called winner-takes-all phenomenon (Shapiro and Varian, 1999). Here, further strategic movements are the most logical consequence – both in the sense of reinforcement and expansion as well as in the sense of (completely) new activities.

After describing the effects between the components clockwise – effects (1) to (3) – and, since the components of the “Concept of Strategic Power” have interdependent effects on each other, the other direction – counter-clockwise, effects (4) to (6) – will be described in the same way.

1. Strategic movements (technology acquisitions – for example, early or late, broadly spread or focused) make it possible to build up and/or increase strategic barriers (for others) and to reduce and/or overcome barriers for one’s own company.

Innovation: On the one hand, technology-driven innovation at the market level leads to incremental, leapfrog or even disruptive market changes (Olivan, 2019), depending on the degree of innovation, and thus enables the establishment of market barriers in the best case. In this way, others (competitors and potential competitors) are forced out of the market or kept out, or at least their market entry is made more difficult. On the other hand, technology-driven innovations sometimes make it possible to enter markets with high market entry barriers in the first place, i.e. to overcome existing barriers with the help of innovation.

Patents: Technology acquisitions are often made in order to secure patents and rights. On the one hand, patents also create market barriers in (technology-dependent) markets – if a company does not have the corresponding patents, it cannot enter the market or can only do so with difficulty (for example, by paying for licenses). On the other hand, patents make it possible to overcome market barriers, i.e. by entering markets that were previously closed to the company due to a lack of patents and rights.

Talents: Acquisitions and mergers are often also an instrument for securing know-how (often technology know-how) tied to people. Particularly against the background of the war for talents and the shortage of highly specialized personnel, this (human) resource represents a critical barrier that must be overcome. In this respect, technology acquisitions in this field also serve on the one hand to create barriers to others (since the available know-how becomes scarce on the market as a result of the acquisition). On the other hand, technology acquisitions also serve to enter new markets or enable the overcoming of the market barrier of know-how or talent.

Data: Digital markets and e-commerce in particular are dependent on data (availability and usability). Only those who have access to direct contact with customers and (thus) to big data can be successful in these markets. Being competitive in information and data markets means having the appropriate technologies at your disposal (artificial intelligence, machine learning, cloud computing, etc.). Only those who have access to these technologies, and thus the data, can play a role in the markets. Thus, on the one hand, technology acquisitions and data enable barriers (to others) to be built up and/or raised; on the other hand, they are the entry ticket to all digital markets.

2. Barriers which can now be passed, enable strategic capabilities to be reorganized and realigned. At the same time, more stringent and/or newly created strategic barriers help to build up, secure and/or expand strategic capabilities.

Innovation: Increased barriers can secure strategic capabilities or, especially in the technology sector, extend the technological lead over the competition through innovations, as these innovations can

be developed within a secure company environment. Likewise, the development of new strategic capabilities is possible due to direct and indirect network effects as well as due to (among other things, resulting from network effects) lock-in effects.

Patents: If the barriers are built up high enough, patents and rights can also be used to extend the lead over the competition. Especially if these are rare and unique, they can be secured as non-imitable and thus increase their effectiveness as a strategic capability.

Talents: In the area of talents, increased barriers ensure that the company remains unique on the employer market. The result: A higher employee retention rate, which means the valuable talents and high potentials will remain loyal to the company. For example, an innovative, technology-leading image could be built up as a new strategic capability.

Data: Network effects and self-reinforcing mechanisms (winner-takes-all mechanisms) take effect here, too. The higher the barriers for others – especially in the area of data – the more valuable the strategic capability becomes in this area, and the more dependent others become on the data of the leading company.

3. Expanded and/or new strategic capabilities serve as an enabler and driving force for new (further) strategic movements.

Innovation: Once (new) strategic capabilities have been developed or expanded – as a consequence of barriers which have been set or overcome – these capabilities will both enable and drive new strategic movements. This will allow previous ideas to be implemented and innovation to be driven. In addition, the new or expanded strategic capabilities can also enable other strategic movements that do not explicitly relate to technology aspects, since technologies also have an impact on other areas.

Patents: The possibility of having patents and rights at one's disposal is also considered a strategic capability – especially in technology-dependent fields, and even more so in the technology sector itself. Here, too, new strategic capabilities initiate further strategic movements because they are possible and because they are obvious.

Talents: In the area of talents, strategic capabilities make new strategic movements possible. Not only because top personnel attracts further high potentials. In technology-driven markets, but also in so-called people-driven markets, talent is the key strategic capability and, like patents and rights, both enabler and driving force. People make the difference, people make decisions, and people push and move the company forward in the sense of strategic movements.

Data: Data is the new oil. Data is often a strategic capability. And here, too, data is pushing to have more and more data and to generate and use it in ever broader contexts, while at the same time enabling completely new application contexts. Data as strategic capability enables and drives strategic movement.

Clockwise or counterclockwise – it is demonstrated that strategic movements, in this case in the sense of technology acquisitions, have an interdependent effect: Following the model, as a starting point to develop strategic power. But an effect with regard to the success factors innovation, patents, talent and data too. This will be illustrated in the following in the form of selected cases of technology acquisitions of GAFAM companies over the past 20 years.

Strategic technology acquisitions as key for success – GAFAM acquisitions as use cases

As already mentioned, GAFAM companies are accountable for an enormous and constant number of technology acquisitions, particularly of technology startups. Following the companies' press releases and/or the relevant sources for the latest industry news as well as scientific sources, many of these acquisitions contribute directly to the success factors of innovation, patents, talent and data discussed here. In the following, 25 of these acquisitions will be presented as examples and they will be assigned to the success factors innovation, patents, talent and data (table 2). In a next step, the interdependent mechanisms of action between strategic movements, strategic capabilities and strategic barriers will be illustrated using these examples from the GAFAM sphere.

Some of the acquisitions are linked to only one of the four factors, while others can be attributed to two or even three of the factors (table 2). While

Google (Google, 2007; Kincaid, 2009; Hong, Bhattacharyya and Geis, 2013; Dolata, 2017, Genzini and Kepalaité, 2018; Callaham, 2022) was able to develop advertising innovation in particular with most of the acquisitions and thus also further advantages in terms of data, and in some cases even purchased additional data inventories, with Adscape, Double Click and Android, not only technology and technological innovation were acquired, but also explicitly the teams behind these companies (as a source of new talent), which were then integrated into Google. Two of Amazon's acquisitions (McCarthy, 2008; Dolata, 2017; Genzini and Kepalaité, 2018) ensure the company important patents (microchip design and touchscreen technology) to be more independent (from the competition) in the hardware market (tablet market). Facebook acquired adtech-innovation, adtech-patents, data and adtech-talent (Siegler, 2011; Dolata, 2017; Genzini and Kepalaité, 2018). Apple is looking in particular for innovation with its acquisitions (Schonfeld, 2012; Gupta and Carew, 2012; Dolata, 2017; Genzini and Kepalaité, 2018) – but not only key hardware components and touchscreen or fingerprint technology and patents for the iPhone are of specific relevance – Apple is also looking for talent for their engineering teams. Speaking of Microsoft's acquisitions (Microsoft, 2007; Hong *et al.*, 2013, Dolata, 2017), in the case of AdECN the acquisition brings both, key technologies and significant domain expertise to Microsoft.

The acquisition of Android (as a strategic movement) built up Google's strategic capability (in terms of technology and innovation as well as talent and know-how in the mobile operating systems market) to own and develop one of the most advanced mobile operating systems. There was nothing comparable on the market (except for Apple with iOS). The barriers to enter the market of mobile operating systems are accordingly very high. The purchase of Zagat and Waze can be viewed in a similar way: Google has tremendously expanded the data base and functionality of Google Maps and created additional value for users with the restaurant reviews (and restaurant information), GPS navigation and a real-time traffic information system now available. The lead in the field of map applications has thus increased again, and the market barriers for others have been raised.

Table 2: Selected examples of GAFAM technology acquisitions assigned to the success factors innovation, patents, talent and data

Acquirer	Acquiree	Year	Innovation	Patent	Talent	Data
Google	AdMob (mobile advertising)	2009	x			x
Google	Adscape (advertising software)	2007	x		x	
Google	Android (mobile software)	2005	x		x	x
Google	Zagat (review platform)	2011				x
Google	DoubleClick (internet advertising)	2008	x		x	x
Google	Waze (GPS navigation software)	2013	x			x
Amazon	Annapura Labs (hardware)	2015	x	x		
Amazon	Audible (audio book download provider)	2008	x			x
Amazon	Kiva Systems (automatic ordering systems)	2012	x			
Amazon	Liquavista (hardware)	2013	x	x		
Amazon	Dispatch (robotic hardware)	2017	x	x	x	
Facebook	Atlas Solutions (advertising)	2013	x	x		x
Facebook	Beluga (messaging)	2011			x	
Facebook	FriendFeed (social networking aggregator)	2009			x	
Facebook	Oculus (hardware)	2014	x	x		
Facebook	GrokStyle (image search software)	2019	x			
Apple	Anobit (flash storage technology)	2011	x		x	
Apple	AuthenTec (biometrics hardware)	2012	x	x		
Apple	WifiSlam (indoor mapping technology)	2013	x			
Apple	FingerWorks (touchscreen technology)	2005	x	x	x	
Apple	DataTiger (marketing software)	2019				x
Microsoft	AdECN (advertising exchange platform)	2007	x		x	
Microsoft	aQuantive (advertising)	2007	x			x
Microsoft	Calista Technologies (graphic technology)	2008	x			
Microsoft	Semantic Machines (software)	2018	x	x		x

Buying (as a strategic movement by Amazon) Audible, with all its existing subscribers and the respective user data, combined with Amazon's already existing strategic capabilities, led to enormously high market entry barriers

in the audio book market. A market entry was almost impossible to overcome by other (potential) competitors until the emergence of streaming music platforms.

The acquisition of Oculus at a time when virtual reality technologies were not yet ready for the market enabled Facebook to secure relevant patents and thereby significantly influence the further development of VR glasses. This enabled Facebook to raise the barriers to market entry to such an extent that Facebook is currently one of the dominant players in the VR market.

The strategic movement to buy a touchscreen technology pioneer and make an innovative control technology for mobile devices marketable became one of the strategic capabilities for Apple. The innovation (or invention) of the iPhone smartphone became possible. Securing patents is not only in this case a central competitive factor in the mobile devices and hardware markets.

Microsoft's goal in acquiring Semantic Machines is to enhance its strategic capabilities of natural-sounding voice assistants using the data collected by Semantic Machines to help guide the further development of this technology and thereby become the most important business partner of such voice assistants.

To sum up the situation of GAFAM, it can be said that they have such a high level of liquidity and cash reserves that they are able to conduct any acquisition they would like to at any time. This acquisition-power is one of the sources of their success. Their strategic movements cause the interdependent and self-reinforcing effect to gain strategic power to win the war for innovation, the war for patents, the war for talents, and the war for data.

Evaluation of the “Concept of Strategic Power” – findings and next steps

With the “Concept of Strategic Power”, certainly, only a pragmatic approach has been presented here (as a reminder, it all started with a thought experiment on the title “power”), with which, starting from acquisition activities from the GAFAM-sphere, an attempt has been made to explain the

mechanisms of action of the superiority of these companies. It is assumed that acquisitions are the starting point of success (strategic movements), which then become capabilities and finally strategic power and thus initially account for the success of GAFAM. However, it is just as plausible as it is likely that the success here can be due to the company's very own business model (Google), clever marketing (Apple) or other success factors (capabilities), an extreme willingness to take risks (Amazon in the early years) and other reasons. It is also clear that this type of case study application is almost solely descriptive and therefore analytical to an almost limited extent only.

Nevertheless, the concept can be considered suitable: Because of its interdependent structure and cyclicity, other directions of action than those described between potentials, movements and barriers are not excluded. Moreover, the examples as well as other authors (for example Dolata 2017) demonstrate that a central key for the overall success of GAFAM companies lies in technology investments and acquisitions. The GAFAM companies are responsible for an enormous and constant number of acquisitions. Moreover, since then, concerns have been addressed to the fact that the growing number of startup acquisitions made by such tech giants are in reality a strategic way to terminate the competition. This is already drawing the attention of the competition authorities – not only in Europe (Fulgencio, 2021) but now also in the USA (Stoller, 2019; Breuninger and Feiner, 2021).

For management practice, the approach presented here can provide benefit in three areas in particular: (a) The approach can be an alternative way of thinking in the context reasoning, justification and defense in the decision-making processes for technology acquisitions and thus a further component of decision support. Companies can ask themselves the questions: What steps (in terms of movements) do we want to and can we take in this technology area? How do these movements affect our capabilities? What do the movements mean in terms of consciously setting barriers or what opportunities for surpassing barriers arise? (b) The approach is multi-perspective because it takes into account several aspects and especially effects of technology acquisitions (movements) – both direct and indirect. (c) The approach makes clear that the targeted (strategic) selection of technologies is important (which technologies, which actions, which earliness and speed, which diversity or focus, etc.).

This last aspect already points to what could also be interesting for research from a scientific point of view: (i) Under the keywords technology adoption strategies and technology investment strategies, it would be interesting to investigate how early or how late companies, especially GAFAM, invest in emerging technologies. (ii) What does a technology investment portfolio look like, depending on the overall corporate strategy, and are there differences in situational success factors here. (iii) To what extent do the Chinese counterparts of GAFAM, BATX (Baidu, Alibaba, Tencent, Xiaomi) act accordingly or with completely different technology adoption strategies. In China, too, technology companies now dominate access to information, entertainment and communication as well as the production of media content.

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AKVIZICIJA TEHNOLOGIJE KAO NOVA MOĆ. PRISTUP KAKO JE GAFAM USPIO DOBITI RAT ZA INOVACIJE, RAT ZA PATENTE, RAT ZA TALENTE I RAT ZA PODATKE

Sažetak

Gledajući globalne tehnološke akvizicije u proteklih 20 godina, postaje jasno da veliki udio tih transakcija čine tehnološke tvrtke sa sjedištem u SAD-u (poznate i kao GAFAM – Google, Amazon, Facebook, Apple i Microsoft). S obzirom na tržišnu snagu GAFAM-a (Dolata, 2017), koja se očituje ne samo u obliku tržišne kapitalizacije, prihoda i dobiti, već i u drugim dimenzijama konkurentske strategije – kao što su inovacije, patenti, talent/ljudi i podaci, čini se zanimljivim ispitati je li jedan od glavnih razloga goleme moći ovih tvrtki njihova očita i gotovo neograničena sposobnost preuzimanja tehnologije. U kontekstu krovne teme konferencije “MOĆ”, tematski i metodološki je prikladno provesti misaoni eksperiment temeljen na teoretskom konceptu pod nazivom “Koncept strateške moći” (Scholz, 1987; 2001). Ovaj pristup moć smatra međugrom strateških sposobnosti, i strateške barijere te omogućuje procjenu strateške moći kao izvora konkurentske prednosti i tržišnog uspjeha (Scholz, 2001).

Rezultati pokazuju da GAFAM-ova velika akvizicijska moć omogućuje da izvrši bilo koju akviziciju koju želi i time pokrene strateške pokrete. Oni proizvode međuovisni i samo ojačavajući učinak stjecanja strateške moći za pobjedu u ratu za inovacije, ratu za patente, ratu za talente i ratu za podatke.

Ključne riječi: GAFAM, spajanja i preuzimanja, strateška moć, velika tehnologija, tehnološke akvizicije

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RATIONAL AND EMOTIONAL APPROACH IN PUBLIC COMMUNICATION IN THE TIMES OF PANDEMICS: A CALL-TO-ACTION MESSAGE RESEARCH

Scientific paper
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Abstract

For over a decade, a number of scholars and scientific papers emphasized the continual decline of trust in public institutions, mainly in the democracies of “the West”. Some associated the observed phenomenon with the rise of social media and digital environments, while others attributed it to the rise of economic and political power of less democratic regimes of “the East”, such as China and Russia. In times of crisis, trust in government institutions could be of crucial importance for the appropriateness of the institutional response to the problems facing the nation. Across the EU, it is obvious that citizens of certain member states express higher trust in government and state institutions than others. This division has been even more apparent during the COVID-19 pandemic, especially when vaccination rates of particular EU countries are compared. In Croatia, the Government’s main message concerning COVID-19 vaccination was modeled to appeal to the receivers’ empathy towards others. However, emotional appeal is just one of the possible courses of action. Theories of rational choices and exchange theories emphasize other, often ulterior motives, such as selfishness and revenge, as equally effective purposes to undertake certain actions. In this paper, we have examined four different types of messages, based on selfishness, revenge, honesty and empathy, and their power to persuade research subjects to get vaccinated. Message reception results are compared to other socio-demographic and behavioral factors to define which message type would be most appealing to different demographic groups.

Keywords: Rational and emotional messages, selfishness, vengefulness, honesty, empathy, COVID-19

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Introduction

Two years after the outbreak of COVID-19, the latest Eurobarometer (Eurobarometer 94) shows that trust in the European Union increased across the “club”, as did the trust in certain national institutions, but the distribution of trust is unequal. While national governments and related institutions gained trust in countries of the global north, such as in Scandinavia, the situation in the global South is quite the opposite. Compared to EU-27, trust in various institutions such as traditional media (print, radio, and television), the judiciary system, public administration, political parties etc., judging by the percentages of positive answers in, for example, Croatia, is steadily declining. While the national response to the COVID-19 crisis possibly played an important role with respect to the levels on trust, decline of trust in institutions is not a new phenomenon (Norris, 2011). Norris and Inglehart attribute the decline in trust to many parallel social processes noting, among other things, that “cultural issues, and the politicization of social identities, tend to divide into ‘Us-versus-Them’ tribes, bringing uncompromising and extreme party polarization” (2019:54). While claiming that “western societies have been getting steadily more socially liberal on many issues over several decades, especially among the younger generation and college-educated middle classes” (p. 94), Norris and Inglehart conclude that “paralleling these changes is a decline in respect for authority” (p.96).

Various authors showed that decline in the trust in institutions and decline in authority is partly connected to the main media sources of information, especially internet sources and social media as the main distractors (e.g. Vosoughi, Roy and Aral, 2018; Tsfati and Ariely, 2014; Jamieson and Cappella, 2008). Since 2016, various reports (e.g., Newman et al., 2022; Newman et al, 2021; Newman et al., 2019; Čerepinko and Gamberožić, 2019; Čerepinko, Bagarić and Dujić 2019) showed that online sources have become the dominant information channel for the majority of respondents, and the discrepancy between certain countries in Eurobarometer results could be, to certain level, explained by the discrepancy in the trust in online information sources. Croatian respondents, for example, have more trust in social networks than their EU counterparts (EU overall: 19% positive attitude, 68% negative attitude and 13% don’t know; Croatia: 29% positive attitude, 59% negative attitude and 12% don’t know). The

percentages are similar for online sources: EU overall: 35% positive attitude, 54% negative attitude and 11% don't know; Croatia: 37% positive attitude, 52% negative attitude and 11% don't know).

The problem with trust could partly also be traced to the communication strategies applied during the crisis. This paper aims to detect the role of different approaches in message formation (rational vs. emotional approach) that could lead to better public communication and the improvement of trust in institutions.

Communication during COVID-19 crisis

Regarding governmental and public communication response to the COVID-19 crisis, several authors noted the same structural problem that was mentioned in the introduction: the lack of proper response to misinformation campaigns on social networks (known as “infodemic”), and the unpreparedness of institutions for high-quality risk communication (Lovari, 2020; Ataguba and Ataguba, 2020).

Building upon previous research regarding crisis communication, Mallecki, Keating and Safdar (2021) focus on hazard and outrage as the key factors in planning successful public communication campaigns. Hazard refers to the number of people affected by a certain threat, and outrage to the reaction that seeks to reduce the anger and resentment felt by the public. They recognize planning as one of the key actions, and propose creating goals depending on the stage in the lifecycle of the crisis (pre-crisis; in-crisis; maintenance and post-crisis), with three main goals: addressing COVID-19 patients, addressing hazard, and addressing outrage through five communication strategies: careful planning; accepting the public as partners; transparent and honest approach to the public; acknowledgment of the uncertainties; compassion in communication and evaluation and reassessment of applied strategies.

Both aspects are based on the rational and emotional decision-making process, but, for the purposes of this paper, hazard is perceived more as a rational, and outrage more as an emotional response with regard to personal strategies for coping with the pandemic.

The rational and the emotional choice

Rational decision-making is based on socio-economic theories, such as the rational choice theory (See Scott, 2000), or the social exchange theory (See Foa and Foa, 1976; Blau, 1964; Homans, 1961), postulating that people make decisions about various issues by taking into account all the costs and benefits of a certain decision for their social or material gains. “In rational choice theories, individuals are seen as motivated by the wants or goals that express their ‘preferences’. They act within specific, given constraints and on the basis of the information that they have about the conditions under which they are acting” (Scott, 2000, p. 127). Another line of research originated from psychological perspectives focused on balance of power within groups/dyads and on mutual interdependence of involved individuals (see Thibaut and Kelley, 1959). Such a theoretical framework, positivist in nature, enables testable hypotheses and prediction of behavior, but is to some extent met with criticism, mostly because, as shown below, it does not take into account all of the aspects of the decision-making process.

As Scott (2000) specifies, the rational choice theory does not encompass a wide scope of different social norms that build social interactions and exclude both altruism and mutual trust of dyad or group members. For example, Cook and Emerson (1978) emphasize that trust (and fairness) should not be perceived as a rational behavior, but rather as social norm(s) with moral power to counter rationality. Elster (1989) claims that rational choices and social norms are separate but complementary processes in composing social actions.

Hechter and Kanazawa (1997) point to another path of criticism that emphasizes the lack of realism, because the rational choice theory does not consider emotions, habits, hastiness and other personal traits, as well as individual values, when calculating the best interest of an individual.

Considering the limitation of the rational choice theory, Coleman (1990) introduced micro and macro levels into the theoretical framework, enabling the introduction of personal characteristics of each individual, and accepting the notion that rationality is not universal and general, but is dependent on a particular situation and its interpretation. Hechter and Kanazawa (1997, 208) note that (...) “*sociological rational choice is an inherently multilevel enterprise. It seeks to account for social outcomes on the basis*

of both social context and individual action. In this respect it often differs, at least in emphasis, from other (thin) versions of rational choice theory that are employed in much economic analysis and game theory”.

Speaking about the impact of emotions on decision-making, the term emotion in this context is considered in a broader sense – from current emotions such as love, attraction, hatred, etc., to empathy and to previous experiences, either our own or the experiences we had a chance to hear about.

Damasio (1994) proved that the observed patients who were not able to use their emotional memories were unable to choose between the options they were offered, which is similar to the findings of Corcos and Pannequin (2011), Thompson (2014) Kvaran, Nichols and Sanfey (2013). Wondra and Ellsworth (2015) state that people’s emotional reactions are determined by their self-defined goals, and their evaluation whether a certain action is good or bad is based on whether it contributes to the achievement of their goals, and to what extent. If the individual assess that the situation does not affect their goals in any way, their emotional reaction could be absent.

Frith (2007) states that individuals communicate better when able to predict what will happen next and create long-term or short-term assumptions, based on experience. Dunbar (2009) points out that the above is a prerequisite for the emergence of the Theory of Mind phenomenon, i.e., the ability of an individual to imagine himself in the position of another individual.

The results of the research by Burgoon and Hale (1988) showed that the attractiveness (physical and social) between the interlocutors, and the estimated credibility of the interlocutors, influence the outcomes of the interaction. One of the factors that influence the outcome is the individual’s assessment (evaluation) of the extent of the earned benefits: the higher the evaluation (more positive), the more positive and successful are the outcomes of the interaction perceived.

In-group bias is another factor in decision-making based on perceived closeness with others, defined by Scheepers et al. (2006) as a ubiquitous and diverse phenomenon that appears in all types of groups, in different cultures. When individuals identify with the identity of a group, they are ready to invest an effort in raising the reputation of the group and

improving the position of the group in relation to other groups (Scheepers et al., 2006; Gomez et al, 2021, Scheepers et al. Ph.D., 2003), meaning that messages targeting in-group bias will be met with greater approval and better motivate to action.

Another perspective on rational and emotional decision-making can also be assumed by applying the Game Theory. Although the Game Theory rests on rational foundations and assumptions, research shows that the decisions of individuals are often more driven by emotional than rational motives (Bornstein and Yaniv, 1998; Santos et al., 2015; Bohnet and Frey, 1999; Robert and Carnevale, 1997; Bechler et al., 2015). Bornstein and Yaniv (1998) showed that not all subjects display rational behavior and make decisions influenced by their emotions, mainly honesty and fear of vindictiveness/punishment, and when encouraged to empathize, the results are closer to an even distribution, i.e., the players behave even more fairly (Bohnet and Frey, 1999; Bechler et al., 2015).

The above studies clearly point out that people are more inclined to act honestly than selfishly, although research, based on rational theories, shows that they have clear arguments to act selfishly. Fear of social isolation as an act of punishment for selfish behavior can also be a reason for this, especially if individuals are engaged in behavior not benefiting or even endangering their social groups, thus punishing these individuals, and vengefulness as a personality trait is key to the long-term survival and development of the group (Friedman and Singh, 2004; Hilbe and Sigmund, 2010; Frey and Rusch, 2012; Shutters, 2013; Han and Lenaerts, 2016). As stated by Frey and Rusch (2012), the first level of punishing individuals who do not cooperate is social pressure on these individuals through gossip, insults, contempt, etc. They also state that this social pressure grows very quickly when individuals do not change their behavior and start cooperating. The final measure of punishment is the exclusion of that individual from the group, whereby one loses the advantages of group membership. It is clear that vengefulness is not a desirable trait in terms of rational action, because by revenge/punishment an individual threatens his success, damages his reputation, or exposes themselves to potential criticism or conflict.

Some studies (Rand et al., 2009; Scheepers et al., 2006) have shown that people respond better to positive than to negative messages and are more willing to take certain actions based on a positive call to action.

Methodology

The research was conducted in the form of an online questionnaire. The participants were students (N=214), and the sample was selected by the snowball sampling method. The questionnaire consisted of a total of ten questions, of which four dealt with socio-demographic characteristics (gender, age, level of education and level of monthly household income), and three with behavioral habits (preferred source of information, preferred source of news on the internet, and preferred device they use to surf the web).

The remaining three questions consisted of different types of messages, and the respondents were asked to rate how much they agree with each message, using a Likert scale from 1 to 5 (1 – I do not agree at all, 5 – I completely agree).

Respondents were divided into four groups, each group responding to messages related to one of the four different types of emotions – selfishness, empathy, honesty, and vengeance. Respondents were offered one in an imperative form and one in one declarative form. The third message focused on in-group bias and trust in institutions.

Results

A total of 214 respondents participated in the research, of whom 67% were women and 33% were men. The age group of the respondents was determined on the basis of generational affiliation, so the respondents were divided into five age groups – generations, according to Strauss, Strauss and Howe (1991). In total, 68% respondents belonged to the age group between 21 and 37 years of age, which is expected considering that the sample consisted of students. 14% respondents were younger than 20, 10% were between 38 and 44 years of age, and 8% were between 45 and 58 years of age. There were no respondents over the age of 59.

Expected results with regard to the target group of this research were also obtained regarding the level of education completed by the respondents: 44% of the respondents had a high school or undergraduate diploma. 10% completed graduate studies, and 2% had master's or doctoral degrees.

The fourth socio-economic question was related to the monthly income of the respondents' household in order to determine the possible connection between the level of income and the level of empathy or trust in institutions. A total of four answers were offered: less than HRK 7,793, between HRK 7,794 and 15,588, more than HRK 15,588 and, as the fourth option, respondents were given the option to refuse to answer the question. The stated amounts were chosen on the basis of a survey by the National Bureau of Statistics on average household consumption in Croatia in 2019³⁵. According to these data, the average monthly consumption was HRK 7,793, and the amount of HRK 15,588 is twice the average monthly consumption. The majority of respondents (44%) declared that their income was between HRK 7,794 and HRK 15,588, while 17% declared that it was less than HRK 7,793, 23% declared that it was more than HRK 15,588, and 16 % refused to answer.

Four fifths of the respondents named internet portals (45%) and social networks (36%) as their preferred source of information. A negligible number of respondents named traditional mainstream media. The largest percentage of the remaining respondents chose television (5%), while radio and print were named as the preferred source of information by only 2% and 1% respondents, respectively. Interestingly, 9% said that they avoid the news altogether.

When specifically asked about their preferred source of news, most respondents (40%) named social networks. Portals operated by national corporate media were chosen by 28% respondents, and national independent media portals were chosen by 22%. As expected, portals operated by foreign media outlets (8%) and independent foreign portals (2%) received the fewest responses. Additionally, 86% respondents said that they use their mobile phones to search/access the internet, and 14% said that they use desktop computers.

35 https://web.dzs.hr/Hrv_Eng/publication/2020/SI-1676.pdf

Regarding the messages related to different types of emotions (selfishness, empathy, honesty, and vengefulness), as shown in Figure 1, messages (both imperative and declarative) that refer to selfishness as an emotion received the highest average rating of 3.48 (imperative) and 3.37 (declarative). Messages focused on empathy received a score of 3.09 and 3.06, respectively, and messages promoting honesty a score of 2.78 and 3.03. Messages focused on vengefulness received the lowest average ratings of 2.27 and 2.18, respectively.

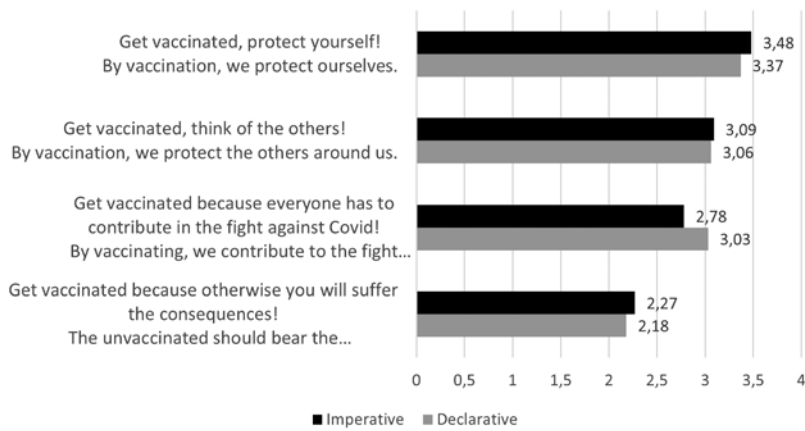


Figure 1: Average scores of agreement of the respondents with different types of messages

One positive and one negative message were offered to test the messages related to in-group bias, as shown in Figure 2. Respondents largely agreed with the positive message (average rating of 3.2), while the negative message had a significantly lower average rating (2.13).

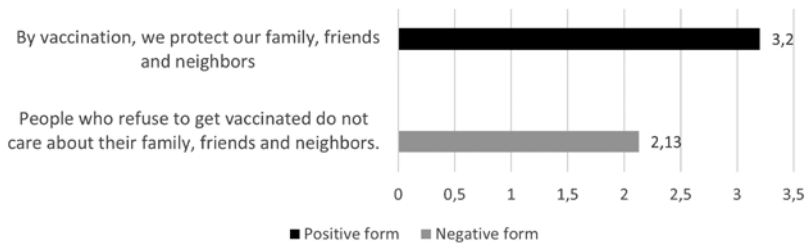


Figure 2: Average scores of agreement of the respondents with the in-group statements

The overall average scores for messages focused on trust in institutions (See Figure 3) are lower than the other tested messages. The claim that the Government of the Republic of Croatia handled the pandemic well received the highest rating (2.32), while the Civil Protection Headquarters received a score of 2.2 for the same claim. The respondents agreed with the claim that they trust the Government and state authorities of the Republic of Croatia when it comes to the COVID-19 pandemic with an average score of 2.0. The claim that the pandemic is exaggerated and that COVID-19 is not as serious a disease as it had been made out to be by the media received an average rating of 3.07.

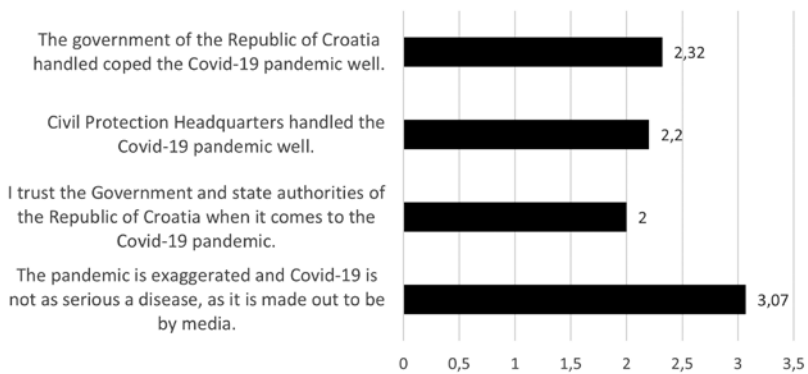


Figure 3: Average scores of agreement of the respondents with the statements of trust

Discussion

The results showed that the respondents agreed to the greatest extent with the imperative message aimed at selfishness (Get vaccinated, protect yourself!). Cross-tabulation analysis showed that respondents who named internet portals and social networks as their preferred source of information agreed with this statement to the greatest extent. On the other hand, respondents who avoid the news agreed with this statement to the least extent. Likewise, respondents who most often use their mobile phone to surf the web agree with the statement to a much greater extent (3.58) than those who usually use a computer for this purpose (2.87). However, since the majority of the respondents were mobile phone users, this result should be taken with caution.

Almost identical results were obtained by analyzing the declarative form of a message focused on selfishness (By vaccination, we protect ourselves.).

Table 1: Crosstab analysis – level of agreement with the imperative message aimed at selfishness and preferred source of information.

Crosstab

Count

Social networks	Preferred source of information (pick one answer):								Total
	Internet portals	I avoid the news	Something else	Radio	Television	Print			
To what extent (from 1 to 5) do you agree with the following statement? [Get vaccinated, protect yourself!]	1	10	19	9	2	1	1	0	42
	2	11	3	2	0	1	3	0	20
	3	12	11	2	0	0	2	0	27
	4	23	13	0	2	2	3	0	43
	5	21	51	6	0	0	2	2	82
Total	77	97	19	4	4	11	2	214	

Table 2: Chi-Square tests – level of agreement with the imperative message aimed at selfishness and preferred source of information.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	53,810a	24	,000
Likelihood Ratio	58,598	24	,000
N of Valid Cases	214		
a. 24 cells (68,6%) have expected count less than 5. The minimum expected count is .19.			

According to some authors (e.g. McChesney, 2016; Castells, 2013; Morozov, 2011), the sole fact that internet sources are main information channels means the dissolution of one shared social reality for those who prefer them over traditional media, since each individual lives in a specific social and information bubble, and each social media newsfeed differs from the others, so a shared sense of society, or at least a sense of shared destiny, could be lacking. There is also research showing that selfishness is a very prominent trait in the human population (Scot, 2000; Elster, 1989; Bornstein and Yaniv 1998), especially if a sense of in-group bias is not achieved (Bohnet and Frey, 1999; Bechler et al., 2015).

A similar result, although with a lower score than selfishness, was obtained by the crosstab analysis of the imperative message focused on empathy (Get vaccinated, think of the others!) and the preferred source of information. Respondents who named internet portals and social networks as their preferred sources of information agreed with the message to the highest extent, and those who avoid the news altogether agreed with it to the least extent (average rating of only 1.79). The same applies to the declarative form of this type of message (By vaccination, we protect the others around us). Even though further research is needed to explore the relationship between individuals who disconnect themselves from media news cycles and those who lack empathy, this finding may indicate deeper personal reasons for withdrawal from news watching.

Table 3: Crosstab analysis – level of agreement with the imperative message aimed at empathy and preferred source of information.

Crosstab

Count

Social networks	Preferred source of information (pick one answer):								Total
	Internet portals	I avoid the news	Something else	Radio	Television	Print			
To what extent (from 1 to 5) do you agree with the following statement? [Get vaccinated, think of the others!]	1	12	22	12	2	1	3	1	53
	2	11	11	3	0	0	1	0	26
	3	18	14	2	1	2	4	0	41
	4	18	15	0	1	1	1	1	37
	5	18	35	2	0	0	2	0	57
Total	77	97	19	4	4	11	2	214	

Table 4: Chi-Square tests – level of agreement with the imperative message aimed at empathy and preferred source of information.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	39,672a	24	,023
Likelihood Ratio	42,797	24	,010
N of Valid Cases	214		
a. 24 cells (68,6%) have expected count less than 5. The minimum expected count is .24.			

In case of the imperative message aimed at honesty (Get vaccinated because everyone has to contribute to the fight against Covid!), a statistically significant difference was found in relation to the completed level of education of the respondents – the higher the completed level of education, the greater the agreement with the message. As the level of education completed among the student population is usually also related to age, these results can be viewed through the prism of age as well.

Table 5: Crosstab analysis – level of agreement with the imperative message aimed at honesty and completed level of education.

Crosstab
Count

Graduate studies	Highest completed level of education					Total
		Master of science or doctorate	Undergraduate studies	High school		
To what extent (from 1 to 5) do you agree with the following statement? [Get vaccinated because everyone has to contribute to the fight against Covid!]	1	5	1	37	21	64
	2	3	0	14	16	33
	3	4	0	18	22	44
	4	1	0	14	17	32
	5	8	4	10	19	41
Total		21	5	93	95	214

Table 6: Chi-Square tests – level of agreement with the imperative message aimed at honesty and completed level of education.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	27,556a	12	,006
Likelihood Ratio	25,993	12	,011
N of Valid Cases	214		

a. 9 cells (45,0%) have expected count less than 5. The minimum expected count is .75.

Older participants were more inclined to agree with the message in imperative form that called for the punishment of those who do not contribute to the overall betterment of the community, that is, a message characterized by vengefulness (Get vaccinated because otherwise you will suffer the consequences!) – most respondents between 45 and 58 years of age (2.65), followed by respondents between 38 and 44 years of age (2.52). As already mentioned, research has shown that punishing individuals who do not contribute to the overall success of the group and vengefulness as a personality trait are crucial for the long-term survival and development of the group (Friedman and Singh, 2004; Hilbe and Sigmund, 2010; Frey and Rusch, 2012; Shutters, 2013; Han and Lenaerts, 2016). With the assumption that older members of the community have more experience

in life and relations with the members of community, the results could be interpreted in this regard.

Table 7: Crosstab analysis – level of agreement with the imperative message aimed at vengefulness and age of respondents.

Crosstab
Count

Up to 20 y.o.	Age				Total	
	Between 21 and 37 y.o.	Between 38 and 44 y.o.	Between 45 and 58 y.o.			
To what extent (from 1 to 5) do you agree with the following statement? [Get vaccinated because otherwise you will suffer the consequences!]	1	13	71	7	5	96
	2	8	21	2	5	36
	3	3	22	9	2	36
	4	2	17	0	1	20
	5	5	14	3	4	26
Total	31	145	21	17		214

Table 8: Chi-Square tests – level of agreement with the imperative message aimed at vengefulness and age of respondents.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	22,625a	12	,031
Likelihood Ratio	21,673	12	,041
N of Valid Cases	214		
a. 10 cells (50,0%) have expected count less than 5. The minimum expected count is 1.59.			

Two messages were aimed at in-group bias: one was positive (By vaccination, we protect our family, friends, and neighbors) and one was negative (People who refuse to get vaccinated do not care about their family, friends, and neighbors). In case of the positive message, our analysis showed a statistically significant difference regarding the respondents' preferred source of information. In this case, again, respondents whose preferred sources of information are internet portals and social networks agreed with the statement the most, and those who avoid news agreed with it the least.

Table 9: Crosstab analysis – level of agreement with the positive message aimed at in-group bias and preferred source of information.

Crosstab
Count

Social networks	Preferred source of information (pick one answer):								Total
	Internet portals	I avoid the news	Something else	Radio	Television	Print			
To what extent (from 1 to 5) do you agree with the following statement? [By vaccination, we protect our family, friends and neighbors.]	1	15	18	13	2	1	1	0	50
	2	9	9	1	0	0	3	1	23
	3	14	16	1	0	2	3	0	36
	4	19	18	1	2	1	3	1	45
	5	20	36	3	0	0	1	0	60
Total	77	97	19	4	4	11	2	214	

Table 10: Chi-Square tests – level of agreement with the positive message aimed at in-group bias and preferred source of information.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	47,703a	24	,003
Likelihood Ratio	45,402	24	,005
N of Valid Cases	214		

a. 24 cells (68,6%) have expected count less than 5. The minimum expected count is ,21.

In addition, there is a difference regarding the device respondents use to search the internet (higher average score for those who use their mobile phones), but also regarding the preferred source of news on the internet. Respondents who named portals operated by foreign media outlets (3.5) and independent national portals (3.45) as their preferred sources had the highest rating, and respondents who named independent foreign portals (2.6) and portals operated by national corporate media companies (3.03) had the lowest rating. However, since the sample is biased towards internet portals and social networks, this result should also be taken with caution. In case of the negative message, the results showed that older respondents and respondents with a higher level of education agree with it to a

greater extent. As research has shown (Scheepers et al., 2006; Hamid, 2021, Scheepers et al., 2003), in-group bias occurs when individuals identify with a group. In this case, they are more willing to fight for the welfare of the group. Greater experience and a higher level of education in this case can be associated with a better understanding of the importance of belonging to a group, both for one’s own well-being and for the well-being of the community.

Table 11: Crosstab analysis – level of agreement with the negative message aimed at in-group bias and age of respondents.

Crosstab

Count

Up to 20 y.o.	Age				Total	
	Between 21 and 37 y.o.	Between 38 and 44 y.o.	Between 45 and 58 y.o.			
To what extent (from 1 to 5) do you agree with the following statement? [People who refuse to be vaccinated do not care about their family, friends, and neighbors.]	1	17	74	8	5	104
	2	3	21	7	1	32
	3	7	25	3	4	39
	4	3	17	2	2	24
	5	1	8	1	5	15
Total	31	145	21	17		214

Table 12: Chi-Square tests – level of agreement with the negative message aimed at in-group bias and age of respondents.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	22,883a	12	,029
Likelihood Ratio	16,993	12	,150
N of Valid Cases	214		
a. 11 cells (55,0%) have expected count less than 5. The minimum expected count is 1.19.			

Table 13: Crosstab analysis – level of agreement with the negative message aimed at in-group bias and completed level of education.

Crosstab
Count

Graduate studies	Highest completed level of education				Total	
	Master of science or doctorate	Undergraduate studies	High school			
To what extent (from 1 to 5) do you agree with the following statement? [People who refuse to be vaccinated do not care about their family, friends, and neighbors.]	1	7	1	52	44	104
	2	4	1	13	14	32
	3	3	0	17	19	39
	4	5	0	7	12	24
	5	2	3	4	6	15
Total	21	5	93	95	214	

Table 14: Chi-Square tests – level of agreement with the negative message aimed at in-group bias and completed level of education.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	30,699a	12	,002
Likelihood Ratio	19,581	12	,075
N of Valid Cases	214		

a. 9 cells (45,0%) have expected count less than 5. The minimum expected count is .35.

As already mentioned, the respondents gave the lowest average score regarding trust in institutions. The oldest respondents mostly agreed with the statement that the Government of the Republic of Croatia handled the COVID-19 pandemic well (3.05), but the average rating of the youngest was the second highest (2.58). Respondents who declared that they avoid the news also agreed with this statement to the lowest extent.

Table 15: Crosstab analysis – level of agreement with the statement that the Government handled the pandemic well and age of respondents.

Crosstab
Count

Up to 20 y.o.	Age				Total	
	Between 21 and 37 y.o.	Between 38 and 44 y.o.	Between 45 and 58 y.o.			
To what extent (from 1 to 5) do you agree with the following statement? [The government of the Republic of Croatia handled coped the Covid-19 pandemic well.]	1	4	38	7	1	50
	2	10	48	7	4	69
	3	14	52	3	7	76
	4	1	6	4	3	14
	5	2	1	0	2	5
Total	31	145	21	17	214	

Table 16: Chi-Square tests – level of agreement with the statement that the Government handled the pandemic well and age of respondents.

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	30,062a	12	,003
Likelihood Ratio	26,706	12	,009
N of Valid Cases	214		
a. 9 cells (45,0%) have expected count less than 5. The minimum expected count is .40.			

On a similar question, regarding the Civil Protection Headquarters, the highest average ratings came from older respondents and those who had completed a higher level of education. Older respondents largely agreed with the statement that they trust the Government and state bodies of the Republic of Croatia when it comes to the COVID-19 pandemic.

No statistical significance is found regarding answers on COVID-19 as an exaggerated and unserious between any demographics or behavioral traits.

Conclusion

By analyzing the collected results, several conclusions can be drawn. When the results of agreement with certain statements or types of messages are compared with the respondents' most common source of information, it is interesting to note that the respondents who declared that they avoid the news generally do not agree with any of the statements, that is, they agree to the lowest extent of all respondents. In the same comparison, the results show that respondents who named internet portals as their preferred source of information generally hold more radical views: in most cases, they completely agree or completely disagree with the statements. The above could be due to the fact that on the internet, users choose sources, portals and content that fit their views, and are thereby consolidating their views further.

Comparing the agreement with the statements and messages and the age of the respondents, the results show that older respondents have the highest trust in institutions. In addition, older respondents are more inclined to punish those who do not contribute to the overall well-being of the community.

The relationship between the completed level of education of the respondent and the level of agreement with a particular statement shows that respondents with a higher level of education generally have more trust in institutions. Likewise, these same respondents are more inclined to be honest.

Concerning the development of intra-group bias, the results show that older and more educated respondents are more prone to this social phenomenon. Those who choose internet portals and social networks as their preferred source of information show similar tendencies, but further research is needed to clearly establish in-group frames concerning the individuals they relate to as members of their group.

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RACIONALNI I EMOCIONALNI PRISTUP U JAVNOM KOMUNICIRANJU U VRIJEME PANDEMIJE: ISTRAŽIVANJE PORUKA POZIVA NA DJELOVANJE

Sažetak

Više od desetljeća brojni znanstvenici i znanstveni radovi naglašavali su stalni pad povjerenja u javne institucije, uglavnom u demokracijama “zapada”. Neki su promatrani fenomen povezivali s usponom društvenih medija i digitalnih okruženja, drugi s usponom ekonomske i političke moći manje demokratskih režima “istoka”, poput Kine i Rusije. U vrijeme krize povjerenje u institucije vlasti moglo bi biti od presudne važnosti za primjerenost institucionalnog odgovora na probleme s kojima se nacija suočava. Diljem EU očito je da građani pojedinih država članica iskazuju veće povjerenje u vladu i državne institucije od ostalih. Takva je podjela bila ili je još izraženija tijekom pandemije COVID-19, posebice kada se usporede stope procijepljenosti pojedinih zemalja EU. U Hrvatskoj je glavna vladina poruka o cijepljenju protiv COVID-19 oblikovana tako da apelira na empatiju primatelja prema drugima. Međutim, emocionalni apel samo je jedan od mogućih smjerova djelovanja. Teorije racionalnih izbora i teorije razmjene naglašavaju druge, često prikrivene motive, kao što su sebičnost i osveta kao jednako učinkovite svrhe poduzimanja određenih radnji. U ovom radu ispituje se četiri različite vrste poruka, temeljene na sebičnosti, osveti, poštenju i empatiji, te njihovu moć da uvjere subjekte istraživanja da se cijepe. Rezultati prijema poruka uspoređuju se s drugim socio-demografskim čimbenicima i faktorima ponašanja kako bi se definiralo koja bi vrsta poruke bila najprivlačnija različitim demografskim skupinama.

Ključne riječi: Racionalne i emocionalne poruke, sebičnost, osvetoljubivost, iskrenost, empatija, COVID-19

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AGE DIFFERENCES IN THE RELATIONSHIP BETWEEN MEDIA USE AND ATTITUDES ABOUT VACCINATION³⁹

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Abstract

Theoretical approaches that analyze media effects can be divided into those which state that the impact is real, comprehensive and one-way, and those which state that there is a reversed causality, i.e. that values, characteristics and attitudes affect the way the media are used. In this paper, these approaches were developed on the example of the attitudes towards vaccination, a topic that has become an extremely important social and public health issue with the outbreak of the COVID-19 pandemic. The authors analyzed the data collected in a pilot study on attitudes towards vaccination conducted before the start of the COVID-19 pandemic on a convenience online sample of the Croatian population (N = 822). The results of the research study showed the lack of influence of television and the limited and uneven influence of the use of the Internet and Internet social networking sites on attitudes towards vaccination, i.e. on conspiracy beliefs in the field of vaccination. Namely, the research results revealed negative correlation between the Internet and SNSs use and conspiracy beliefs, which probably flows from the impact of social integration or the prevailing positive information that can be found about vaccination

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online. Furthermore, age was proven to be a significant moderator variable, given that the negative correlation between time spent online and conspiracy beliefs is much stronger among younger people, and the moderating impact of time spent on social media moved to the opposite direction. The results of the research therefore indicate a need to better understand the use of old and new media, their communicative differences, age differences in their use, and other background variables that can lead to unequal influences of the media on different social groups.

Key words: age, Internet, media, social media, vaccination.

Introduction

Attitudes toward vaccination have become an important public health issue in the recent decades, especially with the arrival of the COVID-19 health crisis, with an increasing number of research studies which try to identify the root causes of vaccine hesitancy, as well as the characteristics of anti-vaccination movements (Dubé *et. al.*, 2021). Among other causes, media usage has been selected as one of the most important determinants of vaccine hesitancy. Moreover, it has been proposed that the changed decentralized, pluralized and less controlled media environment is becoming more conducive to the more skeptical vaccination attitudes and behaviors, which can range from the mild doubts and hesitations, to the outright refusal of the vaccination schedules (Aquino *et. al.*, 2017; Broniatowski *et. al.*, 2018; Carrieri, Madio and Principe, 2019; Miškulin *et. al.*, 2022). Even in cases when such impact is not direct, negative information found on the Internet and social media might enhance already present concerns about vaccination (Pavić *et. al.*, 2022). On the other hand, it has been shown that people with more knowledge of science and technology more often use the Internet as their primary source of information in these domains when compared with people who are less knowledgeable (Anderson *et. al.*, 2010). Changing media environment and the appearance of new forms of science journalism, such as science blogs, might provide motivated individuals with new sources of rapid and relevant information which can act as a better bridge between scientists and general public with comparison to the traditional media outlets (Yi-Fan Su *et. al.*, 2015). Moreover, the so-called media complementarity theory (Dutta-Bergman, 2004)

posits that there is a tendency of audience reliance on multiple media formats, which are offering similar information due to use of similar news sources (Yuan, 2011). Thus, it is possible to hypothesize that both old and new media⁴⁰ can have a mainstreaming effect, even though the new media are much less centralized and controlled. For instance, a content analysis of Croatian online newspapers revealed that the coverage of COVID-10 vaccination issue during the pandemics was largely affirmative, with no significant difference between the online newspapers which are online versions of the national daily newspapers, on one side, and the online-only newspapers, on the other side (Pavić, Šuljok and Jurlina, 2022, forthcoming). Additionally, possible influence of new media on vaccine hesitancy does not necessarily need to be the same for all social groups, given that, generally speaking, media effects do not need to be universal in their direction and/or scope. For instance, it has been shown that the Internet exerts different impact on psychological well-being in younger and older adults, wherein the impact is negative among younger adults (Morahan-Martin & Schumacher, 2000; Sharma and Sharma, 2018), and positive among older adults (Wright, 2000; Heo et. al., 2015). Even though it is noted that younger persons are more likely to be vaccine hesitant (Khan, Watanapongvanich and Kadoya, 2021; Robertson *et. al.*, 2021), possible age differences in the media influence on vaccine hesitancy have not been explored until now. In this paper, we aimed to situate the issue of the media influence on vaccination hesitancy into a wider theoretical frame of the theories of media effects, and to test specific hypotheses regarding the direction of the media effects, possible differences between the old and new media, and the possible age differences in this regard. In other words, we aim to draw more theoretical conclusions from a specific research focused on vaccine hesitancy, thus making a bridge between specific research on vaccine hesitancy and the media, dominated by researchers with medical and public health background, and the more general field of media effects, dominated by communication researchers. With that in mind, we first provide an outline of the media effect theories and their dilemmas related

40 In this paper we conventionally define new media (websites, video-games, social media, social networking services, etc.) as media outlets which use digital communication as the main communication vehicle, as opposed to old media such as television, radio and print media. The Internet as the communication vehicle, among other things, brings new types of experiences, ways of representing the world and new relationships between users and consumers and media technologies (Lister et al., 2009).

to the direction of causal links, as well as the strength and uniformity of media effects. After that, based on the results of a survey study, we test specific research questions related to the relationship between media use and vaccine hesitancy, with the special focus on the age differences. We close the paper by providing the tentative explanations of the results, and connecting them to the previously mentioned dilemmas in the field of media effects research.

A short overview of the media effects theories

Media effects theories differ according to approaches that they use in order to explain how the media influence the attitudes and perceptions of the audience. Although there were significant changes in approaches during the last 60 years the main standpoint was to “explain the role that mass media have in improvement or aggravation of relations, values systems, society ideals and individuals that constitute these societies” (Turow, 2009: 214).

Most common media theories classification historically tended to emphasize three or four phase model with each phase characterized by either “significant” or “minimal” media effects (McQuail, 2010). More recent studies (Neuman and Guggenheim, 2011) however provide an alternative six-stage model of cumulative media effects theories. Since it is beyond the scope of this paper to elaborate on all of important media effects theories, here we will give a brief overview of the theories and approaches that analyze media effects divided into those which state that the impact is real, comprehensive and one-way, and those which state that there is a reversed causality, i.e. that values, characteristics and attitudes affect the way media are used. Within the first approach, the media was perceived as almighty. It was believed that on the basis of media content, a direct, linear and monocausal conclusion could be drawn about an identical impact on all recipients (Kunzik and Ziepfel, 2006: 157). Having in mind the fluid boundaries of each media effect phase and its general definition by emerging media technologies, this phase was characterized with “fear of the wide, overarching effects that emerging media like film and radio could have on society” (Borah, 2015: 1). Media content was thought to act as a magic bullet (firing the message directly into audience head without

their own knowledge – Magic Bullet Theory) or hypodermic needle (injection of the message into audience mind and it cause changes in audience behavior and psyche towards the message (Hypodermic needle theory) onto passive and irrational audience which equally responds on media content and without hesitation.

Second approach to media effects emphasizes that values, characteristics and attitudes affect the way media are used, starting in the early 1940s. At first, the media effects were considered as minimal, i.e. weak and limited, so the approach was usually called a limited effect model. The importance of these first theories is reflected by the appearance of intervening variables that modify the influence of the media, “although the influence of the media was still considered one-sided” (Kunzick and Ziepfel, 2006: 159). It was accepted that in addition to social environments (e.g. family and friends) which can affect the impact of media messages, the diversities in personality structure can lead to different media content perceptions. On these grounds Lazarsfeld and Elihu Katz developed concepts like “selective exposure” in order to enlighten the lack of media effects, modeled by Festinger’s (1957) cognitive dissonance. Festinger (1957) claimed that people not only tend to listen to opinions and select reading materials that are consistent with their existing beliefs, but they usually choose to be with people who are like themselves (Griffin, 2012: 219). Therefore, the public willingly chooses to consume media that aligns with their ideas, i.e. the audience will view and construe the medium’s content in a frame that supports their original ideals (Williams, 2018). Social environment as an intervening variable and influence of “others” on media messages impact was also explained by introduction of two-step-flow theory of the mass media. The first step is the direct transmission of information to a small group of people who stay well informed and in the second, those opinion-leaders pass on and interpret the messages to others in face to face discussion (Griffin, 2012:355). The primary proponents of this theory Lazarsfeld and Katz showed that a person’s interpretation of media content is based around the values of their social class or group (Danesi, 2013:293).

Significant change from limited effect model towards direct effect model coincided with the rise of television as a new media. Historically, this third phase “returns to the concept of powerful mass media” (as stated by Noelle Neumann in 1973) with transferred attention to long-term influence, cultural patterns, and institutional behavior (Borah, 2015:2).

The main question was no longer “What do media do to people?” but “What do people do with media?” Within Katz’s uses-and-gratifications approach research was focused not only on the communicator and media content but on active behavior of media recipients (Kunzick and Ziepfel, 2006: 160). This approach viewed the audience as active and goal-directed in its patterns of media consumption and offered an understanding of how audience needs and expectations are linked to media behaviors (Blumer&Katz, 1974). The deliberate personal media choice is emphasized in order to fulfill different purposes at different times (Griffin, 2012:359). Hence, individuals actively engage with particular media messages in order to satisfy their needs, i.e. gratifications they seek from those media.

Overall, as pointed out by Neuman and Guggenheim (2011: 169), it can be concluded that the media effects research has evolving character and moves from relatively simple models of persuasion and prospective change of attitudes, to the more sophisticated and layered models, as scholars successively address the conditions and context of communication effects.

Research questions and methods

Following theoretical ideas and the rationale outlined in the introduction, three research questions were proposed and tested in this study:

RQ1. Is there a connection between the amount of use of television, the Internet and the Internet social networking sites and vaccination conspiracy beliefs?

RQ2. Is there a connection between the frequency of use of health information found on the Internet and vaccination conspiracy beliefs?

RQ3. Does age represent a moderator of the relationship between the stated media use and vaccination conspiracy beliefs?

The first research question aims to test whether there are overall effects of media use, which are related to the theories that posit that media have direct effects on their users. The second and third research questions are framed within the more nuanced theories which state that the causal link might be the opposite, going from the users to the media consumption (RQ2), or that personal characteristics, such as age, can moderate the media effects, i.e. that they are not general media effects as such (RQ3).

The research data come from a pilot study on attitudes towards vaccination conducted in June 2019 (before the start of the COVID-19 pandemic) on a convenience online sample of the Croatian population (N = 822). As the indicator of vaccine hesitancy, a scale of vaccination conspiracy beliefs designed by Shapiro et al. (2016). The scale comprises seven items, and it was already translated, validated and used in a research study in Croatia (Pavić and Šuljok, 2022). The total results were obtained by adding the scores on individual items. Therefore, the scale score ranged from 7 to 35. The frequency of finding health information on the Internet was measured on a 1 (“never”) to 5 (“very often”) scale. Level of education was measured on a scale ranging from 1 (“Secondary vocational school or less”) to 4 (“Master’s degree or higher”). The measurement of the other predictor variables was quite straightforward. Namely, the amounts of time spent on consuming the Internet and television contents, as well as time spent on the Internet social networking sites (SNS), were measured in hours, while the respondents’ age was measured in years. The sample description can be found in Table 1.

Table 1 Sample description

Variable	Mean / Percentage	Standard deviation
Gender	37.8% male; 62.2% female	-
Age (in years)	38.82	10.04
Education		
Secondary vocational or less	22.02%	-
Grammar school	12.41%	-
Undergraduates	18.00%	-
Graduates	47.57%	-
Internet use (time)	3.60	2.77
Internet SNS use (time)	1.72	1.84
Television use (time)	1.24	1.37
Health information Internet	3.02	1.03
Vaccination conspiracy beliefs	16.33	9.10

A more detailed description of the sample and data collection can be found in Pavić and Šuljok (2022).

The collected data were analyzed with a hierarchical linear regression analysis. All variables were grand-mean centered, given that interaction variables as predictors can give rise to multicollinearity problems. After the grand-mean centering was conducted, there was no indication of the collinearity, since the variance inflation factors ranged between 1 and 2. The inspection of the residuals also revealed no significant deviations from the normal distribution.

Results

In order to gain the first insight into the study variables, in Table 2 the bivariate correlations are presented. We can note that vaccination conspiracy beliefs are positively connected to female gender, lower education, lower Internet use, lower Internet SNS use, and higher frequency of finding health information on the Internet. As for the age, older age is negatively correlated with Internet use, SNS use, and finding health information on the Internet, while there is a positive bivariate correlation between age and television use.

Table 2 Intercorrelation matrix

Variables	Gender	Age	Education	Internet use	Internet SNS use	Television use	Health inf. Internet	Vacc. consp.
Gender	1	0.06	0.04	0.24**	0.00	0.00	-0.23**	-0.24**
Age	0.06	1	0.04	-0.14**	-0.10**	0.15**	-0.10**	-0.06
Education	0.04	0.04	1	0.02	-0.10**	-0.11**	0.10**	-0.23**
Internet use	0.24**	-0.14**	0.02	1	0.56**	0.03	0.01	-0.22**
Internet SNS use	0.00	-0.10**	-0.10**	0.56**	1	0.12**	0.06	-0.07*
Television use	0.00	0.15**	-0.11**	0.03	0.12**	1	-0.02	-0.03
Health inf. Internet	-0.23**	-0.10**	0.10**	0.01	0.06	-0.02	1	0.16**
Vacc. consp.	-0.24**	-0.06	-0.23**	-0.22**	-0.07*	-0.03	0.16**	1

Gender: Female = 0, Male = 1;

**p < .05, **p < .01*

Source: Authors

As stated above, a hierarchical linear regression was conducted with vaccination conspiracy beliefs as the criterion variable. In the first step, all predictor variables were entered into the linear regression equation. In the second step, the interaction effects were also added. We can note that the predictors explained about 15% of the criterion variance, while the addition of the interaction effects did not significantly improve the prediction.

As for the predictors, from Table 3 we can observe that gender, education, time spent on the Internet and time spent finding health information on the Internet proved to be significant predictors of vaccination conspiracy beliefs, while the other predictors were not statistically significant. Namely, women on average scored 2.73 points higher on the vaccination conspiracy beliefs scale, while a one-point increase on the education scale decreases vaccination conspiracy beliefs by 1.39 points. A one-hour increase of time spent on the Internet lowers vaccination conspiracy beliefs by 0.60 points, while one-point increase on the Internet health information variable increases vaccination conspiracy beliefs by 1.23 points. As for the second model, we can note that the regression coefficients remained very similar, while the interaction effects of age and the Internet use, as well as age and the Internet SNS use, were also statistically significant. More precisely, the former interaction effect was positive, the latter negative, while the remaining interaction effects were not statistically significant. Since the two interaction effects were statistically significant, the interactions were probed by setting the interacting variables at the mean value, and one standard deviation above and below the mean. The probe showed that Internet use lowered vaccination conspiracy beliefs both among younger and older respondents, but this effect was much stronger among younger respondents. As for the Internet social networking sites, younger respondents who use the SNSs more often showed higher conspiracy beliefs than those who use SNSs less often. This pattern is reversed among older respondents, since those who use SNSs more often have lower conspiracy beliefs.

Table 3 Hierarchical linear regression with vaccination conspiracy attitudes as criterion variable

Variable	Model 1			Model 2		
	B	SE B	β	B	SE B	β
Gender	-2.73**	0.65	- 0.15	- 2.69**	0.66	- 0.14
Age (in years)	- 0.05	0.03	- 0.05	- 0.04	0.03	- 0.04
Education	- 1.39**	0.20	- 0.24	- 1.39**	0.20	- 0.24
Internet use (time)	- 0.60**	0.14	- 0.18	- 0.59**	0.14	- 0.18
Internet SNS use (time)	0.00	0.20	0.00	0.02	0.20	0.00
Television use (time)	-0.27	0.22	- 0.04	-0.28	0.22	- 0.04
Health information Internet	1.23**	0.30	0.14	1.22**	0.30	0.14
Age X Internet use				0.04*	0.01	0.10
Age X Internet SNS use				- 0.04*	0.02	- 0.09
Age X Television use				0.01	0.02	0.01
Age X Health information Internet				- 0.01	0.03	- 0.01
R2		0.15			0.16	
Adjusted R2		0.15			0.15	
R2 – change		0.15			0.01	
F for change in R2		21.17**			1.83	

Gender: Female = 0, Male = 1;

**p < .05, **p < .01*

Source: Authors

Discussion

Overall, the study results did not confirm a uniform influence of the media on vaccination conspiracy beliefs. Moreover, the use of television did not prove to be a significant predictor at all, thus probably indicating a decreasing influence of television as a medium. As for new media, time spent on the Internet and time spent on SNSs had significantly different impact on younger and older persons, thus confirming that personal characteristics and social environment differentially shape media influences, as the second generation theories of media effects would suggest.

More specifically, study results confirmed age differences in media use, given that older respondents more often used television, while younger

more often relied on the Internet. The latter also included searching for health information on the Internet. However, a more important finding is related to the established interaction between age and the Internet and SNS use. The pattern of the age-Internet use interaction can be tentatively explained by the possible proxy function of the Internet use or its consequences on social capital of users. Namely, Internet use may indicate the level of social integration, which might or might not be the direct effect of Internet use. The results of our study indicate such possibility both among younger and older persons. However, among younger respondents, rare use of the Internet may indicate even higher social isolation in comparison to the peers who use the Internet more often, which may further be connected with lower level of trust in social institutions, and finally to the higher vaccination conspiracy beliefs. On the other hand, the pattern of age-SNS use interaction might be explained by the different usage habits among the age groups, i.e. on the consequences of the use related to social capital. In other words, older respondents may be more selective when choosing SNS contacts, thus less often exposing themselves to the contacts who provide vaccination conspiracy beliefs. For instance, Heo *et. al.* (2015) found that higher levels of Internet use were significant predictors of higher levels of social support, reduced loneliness, and better life satisfaction and psychological well-being among older adults. On the contrary, the meta analysis conducted by Lui *et. al.* (2018) showed that there is a medium-sized negative correlation between the heavy Internet use and social support among teenagers and young adults. Therefore, it seems that older persons are more successful in drawing positive social capital from their Internet use, possibly helping them to overcome the problems of social isolation. On the other hand, for younger respondents, online social contacts have less potential for doing the same. For instance, Longest and Kang (2022) found that during the COVID-19 pandemics young adults had the lowest level of depression symptoms when they had a higher level of offline emotional support and a lower level of online informational support.

Alternative explanation rests on the assumption that younger people who have more SNS contacts on average, might be exposed to the more negative influences, in this case negative information about vaccination. Namely, as younger people have generally more negative attitudes about

vaccination, their online social contacts may have more negative impact in comparison to the older persons and their online social contacts.

Positive correlation between the frequency of finding the health information on the Internet and vaccination conspiracy beliefs can be explained in two ways. The first one rests on an assumption that the majority of the Internet health information is negatively oriented towards vaccination, which is hard to sustain, given the significant overlap between offline and online media noted earlier (Dutta-Bergman, 2004). The other explanation posits that the persons who are generally more anxious about their health and trust less more common sources of health information (medical experts) will more often look for the health information online. In this explanation, the causal link flows from the users to the media content choice, thus confirming the media effects approaches, such as the so-called uses and gratification theory, which claim that people choose which media to use and how to use them, instead of being media “victims”.

Conclusions and limitations

Our study extends previous research on the relationship between media use and vaccine hesitancy and the age differences in media use by pointing out possible differences in media effects outcomes that can be attributed to the aforementioned age differences. Namely, our study suggests that the overall use of the Internet and Internet social networking sites have different effects on vaccination conspiracy beliefs across age groups. Additionally, the positive correlation between finding health information on the Internet and vaccination conspiracy beliefs indicate a more active role of media consumers than the theories of the strong and uniform media effects would suggest. Overall, the study results suggest that media effects should be researched by acknowledging individual and social characteristics which filter media influences and make them variable, uneven and sometimes weak.

However, our study has several limitations. First, the cross-sectional nature of our research design and the convenience sample employed in the study make it hard to draw reliable substantive conclusions. Second, our operationalization of media consumption was limited to the time spent on the Internet and SNSs, a very general measure which does not tap into

different ways in which that time can be spent. Additionally, in our study social integration and social support were not measured, which make our explanations of the age differences indirect and tentative. Therefore, future research should aim to explain the age differences in more detail, and to connect them with explicitly measured social integration and social support. And fourth, it should be emphasized again that the data were collected before the COVID-19 pandemic, which makes it hard to say whether the influences noted above are still valid in the new social circumstances.

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DOBNE RAZLIKE U VEZI IZMEĐU UPOTREBE MEDIJA I STAVOVA O CIJEPLJENJU

Sažetak

Teorijski pristupi koji analiziraju medijske učinke mogu se podijeliti na one koji smatraju da je taj utjecaj stvaran, sveobuhvatan i jednosmjernan te one koji smatraju da je riječ o obrnutom kauzalnom učinku, odnosno da vrijednosti, obilježja i stavovi osoba utječu na način upotrebe medija. U ovom se radu navedeni pristupi testiraju na primjeru stavova o cijepljenju, teme koja je izbijanjem COVID-19 pandemije postala iznimno važno društveno i javnozdravstveno pitanje. U radu autori analiziraju podatke prikupljene u pilot istraživanju o stavovima o cijepljenju napravljenom prije početka COVID-19 pandemije na prigodnom online uzorku stanovnika Hrvatske (N = 822). Rezultati istraživanja pokazali su nepostojanje utjecaja televizije te ograničen i nejednolik utjecaj upotrebe interneta i internetskih društvenih mreža na stavove o cijepljenju, odnosno na konspiracijska uvjerenja u području cijepljenja. Nasuprot pretpostavljenoj pozitivnoj korelaciji vremena provedenog na internetu i konspiracijskih uvjerenja, rezultati istraživanja pokazali su da je ova korelacija negativna, što vjerojatno održava utjecaj društvene integracije ili prevladavajuće pozitivne informacije koje se o cijepljenju mogu naći na internetu. Nadalje, dob se pokazala kao značajna moderatorska varijabla, s obzirom na to da je negativna korelacija vremena provedenog na internetu i konspiracijskih uvjerenja mnogo jača kod mlađih osoba, a moderatorski utjecaj vremena provedenog na društvenim mrežama suprotnog je smjera. Rezultati istraživanja stoga upućuju na potrebu da se bolje razumije način upotrebe starih i novih medija, njihove razlike te dobne razlike u upotrebi ili drugim pozadinskim varijablama koje mogu dovesti do nejednolikih utjecaja medija na različite društvene skupine.

Ključne riječi: cijepljenje, dob, društvene mreže, internet, mediji.

**POWER IN THE LEGAL,
ECONOMIC, AND SCIENTIFIC
ENVIRONMENT**

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CHALLENGES OF THE GREEN TRANSITION: IMPLICATIONS FOR THE OPERATION OF ENERGY COMPANIES

Scientific paper

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Abstract

The effects of climate change are being felt in all parts of the world. Ways to predict future climate change and reduce the impact of humans on the climate have been the subject of numerous studies. The transition towards climate neutrality at EU level is the backbone of the European Green Deal. It is about the goal of reducing greenhouse gas emissions by 55% by 2030 and achieving a climate neutral Europe by 2050. Energy companies are responsible for three quarters of greenhouse gas emissions in the European Union, especially those that produce energy from fossil fuels. The paper examines the impact of efforts to reduce greenhouse gas emissions through investments in renewable energy sources, implemented as a result of the adoption of the regulatory framework, on the business and financial performance of three energy companies (Hrvatska elektroprivreda – the HEP Group, Holding Slovenske elektrarne – the HSE Group, and the Slovenské elektrárne a.s. – the SE Group) from the European Union over a three-year period (2017-2019). The main objective of this paper is to determine how adapting to the new European Union regulatory framework in terms of the green transition affects the operation of energy companies, focusing on profitability, liquidity, and financial stability. The paper revealed that the companies observed plan to invest in renewable energy sources and reduce or abandon the use of fossil fuels in electricity generation in line with the European Union's objectives. The analysis of their businesses showed that they approach changes in business models differently with regard to the specifics of the business environment

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and the development of energy infrastructure, which affects success and stability of their businesses.

Keywords: business analysis, energy companies, renewable energy sources, green transition.

Introduction

The increased presence of carbon dioxide (CO₂) in the Earth's atmosphere due to the consumption of fossil fuels and the increasing amount of solid particles in the air are causing growing concern. Renewable energy sources are a substitute for fossil fuels, which are one of the biggest polluters of the environment, and in the last 15 years, European Union (hereinafter referred to as "the EU") legislation has been intensively dealing with this issue and the promotion of ecologically acceptable "green energy" in order to reduce greenhouse gas emissions to a minimum.

The original Renewable Energy Directive (Directive 2009/28/EC) was adopted in 2009. It set the goal of ensuring that 20% of energy consumption in the EU came from renewable sources by 2020, while national goals in the field of renewable energy sources differ for each country, taking into account their characteristics and potential. The revised Renewable Energy Directive (Directive (EU) 2018/2001) entered into force at the end of 2018. The aim of the directive is to help EU Member States fulfil their obligations in terms of the required reduction of greenhouse gas emissions within the framework of the Paris Agreement (UN, 2015). The revised directive defined a new mandatory target of a share of renewable energy of at least 32% in gross final energy consumption in the EU by 2030. In December 2019, the European Commission released the Communication on the European Green Deal (European Commission, 2019), which presented the guidelines and activities necessary for achieving a green transformation, i.e., a climate-neutral Europe, by 2050. In order to achieve this goal, Member States have committed to reducing greenhouse gas emissions by 2030 by at least 55% compared to 1990 levels.

Energy companies that produce electricity from fossil fuel plants are one of the biggest polluters. Namely, according to the European Green Deal data (European Commission, 2019), three quarters of all greenhouse gas emissions in the EU are generated due to energy generation and consumption,

which is the reason why the EU strongly supports investments in renewable energy sources. The changed regulatory and market conditions have affected the position and operation of energy companies. Therefore, this paper investigates the impact of EU adaptation to the requirements for reducing greenhouse gas emissions on the operation of three EU energy companies. The financial statements and financial performance of the companies falling within the scope of this paper will be considered. In this way, we will try to determine how a generation mix of these companies, with an emphasis on renewable energy sources, affects their profitability and stability of their operation.

The paper is divided into several sections. After the introduction there follows Section 2 that deals with the theoretical basis for the analysis of financial reports with special emphasis placed on energy companies. Section 3 presents research results of the impact of efforts to reduce greenhouse gas emissions on business and financial performance of energy companies, while the last section concludes the paper.

Theoretical basis

According to International Accounting Standards 1 (IAS 1, point 9), "the objective of general purpose financial statements is to provide information about the financial position, financial performance, and cash flows of an entity that is useful to a wide range of users in making economic decisions." At the same time, Jooste (2005) states that ratio analysis includes the processing of financial information in order to generate new information, while the causes and consequences of the results obtained within the framework of the analysis will be determined by interpretation. Ratio analysis can be used for decision-making in the company – in the broader sense of the word (Vareško, 2021; Tintor, 2020; Vukoja, 2018; Učkar, Grbin, 2014; Čižmešija, Kurnoga Živadinović, 2012), budget accounting (Hladika, 2014), detecting fraudulent financial reporting (Palac, 2020), predicting business financial problems (Gabrić, 2018; Ježovita, 2015; Zenzerović, 2009), and auditing financial statements (Mijić, Jakšić, 2019; Kontuš, Šarlija, 2019).

Recently, there has been widespread and loud criticism of the impossibility of adapting the analysis to specific needs, partly due to the initial

assumption that financial reports faithfully and objectively depict the financial position, and partly due to the problem of adapting certain ratios to the observed activity. The above is particularly pronounced in the case of energy companies, whose role is particularly emphasised in the transition towards a climate-neutral European Union. These are companies that are extremely capital intensive and require significant investments, be it investments in infrastructure or equipment. In relation to labour-intensive activities, capital-intensive ones usually have a more significant share of fixed costs in total costs and a proportional relationship (an increase) of revenue and profit. Wahlen, Baginski and Bradshaw (2011) state that companies with high operating leverage have higher variability of return on total assets compared to companies with low operating leverage. Therefore, the values of the calculated ratios will be conditioned by the fact whether these are labour- or capital-intensive activities, but the type of activity itself will also affect the values of the ratios.

For energy companies, which are a classic example of capital-intensive companies, by means of ratio analysis of 28 EU energy companies in the period 2005-2015, Borozan, Pekanov Starčević and Radman Funarić (2020) determined the mean value of the current ratio of 1.45 and the quick ratio of 1.19, and assessed liquidity as satisfactory. At the same time, the mean value of the leverage ratio was 0.51, while return on assets and return on capital were 3% and 7%, respectively. Similar research on Italian energy companies was conducted in 2014 by Iovino and Migliaccio (2019). Large energy companies recorded mean values of the quick ratio and the debt-to-equity ratio of 1.16 and 1.22, respectively. As for profitability ratios, the mean value of return on assets was 5.97%. Interesting discoveries were made by Tomczak (2019) in his research on the differences in the financial position between plants that produce electricity from fossil fuels (i.e., coal) and those that produce electricity from renewable sources. His sample included energy companies from the Baltic countries and Central Europe during the period 2008-2017, and the results showed that in most cases there is no statistically significant difference between the financial position of companies that use renewable (“green”) energy sources and those that use only fossil fuels (“red”). More precisely, the mean values of return on assets were 5% for “green” companies and 3% for “red” companies, while the mean values of the current ratio were 1.62 for “green” and 1.28 for “red” companies. Furthermore, the leverage ratio

was 0.50 for “green” and 0.49 for “red” companies. Therefore, he referred to a review of the justification of investment in renewable energy sources from the point of view of private investors.

Research methodology

Three energy companies from the EU were analysed with an emphasis placed on business and financial performance in the three-year period (2017-2019). The main goal of the paper is to determine how the EU requirements for reducing greenhouse gas emissions are reflected within the framework of the European Green Deal on business and financial performance of companies from the former Socialist Bloc, which have always relied on conventional electricity generation.

Hrvatska elektroprivreda d.d. (the HEP Group) was selected as the first company since it is the largest electric power company in Croatia. When selecting other companies, the following characteristics were taken into account: the company is wholly or partially owned by the state, it is the largest electricity company in the country, the value of its consolidated revenue is at the level of approximately EUR 2 billion, and it belongs to the former Socialist Bloc due to similar heritage and easier comparability. Holding Slovenske elektrarne (the HSE Group) from Slovenia met all requirements and was thus selected for analysis. Of other companies that were analysed, the company most suitable for analysis was Slovenské elektrárne (the SE Group) from Slovakia, and hence it was selected as the third company for analysis.

The consolidated financial statements of the companies were taken from the annual reports for 2017, 2018 and 2019, and the annual reports were taken from the websites of the companies that were analysed. All financial statements and financial data are presented in EUR (the reporting currency of the HSE Group and the SE Group), while the financial statements of the HEP Group have been converted into EUR at the exchange rate of 7.50.

Research results

Hrvatska elektroprivreda d.d. (the HEP Group)

Hrvatska elektroprivreda d.d. (hereinafter referred to as “the HEP Group”) is a company owned by the Republic of Croatia, which represents the parent company of the HEP Group. The HEP Group is the largest electric power company in Croatia with an installed capacity of 4,060.25 MW, and the main activities of the group are electricity generation, distribution, transmission, supply and trading. Companies engaged in regulated activities (distribution and transmission) are strictly separated within the HEP Group from those engaged in unregulated activities (supply and generation). A generation mix of the HEP Group includes hydroelectric power plants (51%), thermal power plants (31%), and Krško Nuclear Power Plant (17%), while the share of other sources is negligible. Such generation mix contributes to the reduction of CO₂ emissions within the HEP Group.

The HEP Group derives most of its sales revenue from the sale of electricity (over 80% of sales revenue in all years under observation). During the observation period from 2017 to 2019, HEP was a wholesale gas supplier. In 2019, gas revenue fell by 30% because in 2018 gas was supplied to a national industrial customer (which HEP did not supply gas to in 2019 and 2017). In addition, warmer weather in part of the heating season had an impact on lower consumption and a drop in revenue from the sale of thermal energy in both 2019 and 2018. Consequently, profit was made in the electricity sector, while loss was made in all other sectors. The group achieved net profit of EUR 187 million, which is an increase of EUR 5 million (2.8%) compared to the previous year (i.e., 2018), when it amounted to EUR 182 million, while in 2017 the profit amounted to EUR 173 million.

Property, plant and equipment make up the most significant part of the total assets of the HEP Group and in the entire observation period they amounted to 95% of the total assets. In the period 2017-2019, the HEP Group was one of the most significant investors in Croatia, and investments in 2019, 2018 and 2017 amounted to EUR 451.5 million, EUR 316.8 million, and EUR 324.3 million, respectively. Investments mostly

related to the modernisation and renovation of electric power system facilities and generation facilities, as well as facilities for the construction of new and retrofitting of existing electric power system facilities and network infrastructure facilities in the fields of transmission and distribution. Investments were mostly supported through equity financing thanks to good liquidity and good business results.

Holding Slovenske elektrarne (the HSE Group)

Holding Slovenske elektrarne d.o.o. (hereinafter referred to as “the HSE Group”) is the parent company of the HSE Group headquartered in Ljubljana, and it is entirely owned by the Republic of Slovenia. The basic activities of the HSE Group are the sales and trade in electricity and thermal energy, CO₂ emission allowances, certificates of origin and other renewable energy certificates, the optimisation of the HSE Group production, the provision of ancillary services needed for the functioning of the electric power system, and the implementation and management of energy projects. The HSE Group is the largest electricity producer and trader from domestic sources on the wholesale market in Slovenia and the largest Slovenian electricity producer from renewable sources with a total installed capacity of 1,915.47 MW. In terms of its generation mix, the HSE Group produces electricity in thermal power plants (52%) and hydroelectric power plants (48%). Although the share of electricity production from hydroelectric power plants is 48%, thermal power plants use coal as fuel, which is a significant source of greenhouse gas emissions.

Electricity generation in the members of the HSE Group dropped by 2% in 2019 compared to the previous year. Regardless of the amount of electricity generated, by increasing its sales activities, especially abroad, the HSE Group achieved 16% higher revenue from the sale of electricity compared to the previous year and made a profit in 2019. The Šoštanj Thermal Power Plant d.o.o. achieved 12% higher revenue from the sale of thermal energy due to higher sales prices as a result of higher prices of CO₂ emission allowances. The HSE Group compensates for electricity needs by additional purchases on foreign markets. Due to a sharp increase in average electricity prices since May 2018, purchases were unfavourable, which had a negative impact on the HSE Group’s result related to electricity sales. As

a result of the above, sales revenue fell by 7% compared to 2017. At the end of 2018, the HSE Group recorded a loss totalling EUR 11.8 million.

On 31 December 2019, the assets of the HSE Group were 3% lower compared to the situation recorded on 31 December 2018. On 31 December 2018, the assets of the HSE Group were at the level of the previous year (i.e., 2017). Property, plant and equipment decreased in 2018 by 3% compared to 2017. In 2019, the HSE Group made investments amounting to almost EUR 41 million (compared to EUR 57 million in 2018, and EUR 49 million in 2017). Most of these funds were intended to increase safety and reliability in electricity generation systems.

Slovenské elektrárne a.s. Group (the SE Group)

The main activity of the Slovenské elektrárne a.s. Group (hereinafter referred to as “the SE Group”) is electricity generation and sales. The company is the largest electricity producer in Slovakia and one of the largest in Central Europe. The SE Group also generates and sells thermal energy and provides auxiliary services for the electric power grid. There were two owners of the parent company Slovenské elektrárne a.s. as at 31 December 2019. The majority shareholder is Slovak Power Holding BV,⁴⁴ with a 66% share in the registered capital. The minority shareholder, which holds 34% of the share capital, is the Slovak Republic. A generation mix of the SE group, with the total installed capacity of 4,080.92 MW, includes nuclear power plants (48% of installed capacity), hydroelectric power plants (40% of installed capacity) and thermal power plants (12% of installed capacity), while the share of other capacities is negligible (two solar power plants). Given that it generates most of its electricity from nuclear power plants and hydroelectric power plants, the SE Group records low levels of CO₂ emissions.

Taking into consideration a revenue structure of the SE Group, it can be seen that in all years throughout the whole period under study, revenue from the sale of electricity accounts for approximately 80% of revenue

⁴⁴ A 50% shareholder of Slovak Power Holding BV is Energetický a průmyslový holding a.s., Czech Republic (EPH), a leading energy group in Central Europe with more than 25,000 employees, and the other 50% of the company is owned by ENEL Produzione S.p.A., Italy, a multinational company in the energy sector with more than 62,000 employees and the world's leading integrated electricity and gas operator.

generated on the national market. In 2019, the group generated 14% less revenue from the sale of electricity on the national market compared to the previous year, while in 2018, it recorded a 7% increase in sales revenue compared to 2017. At the same time, revenue from the sale of thermal energy makes up only about 2% of revenue on the national market. Net profit for 2019 was EUR 22.6 million, compared to EUR 19.6 million in 2018 and EUR 62.9 million in 2017.

On 31 December 2019, the assets of the SE Group were 8% higher compared to 31 December 2018, and the assets on 31 December 2018 were 6% higher compared to 31 December 2017. Property, plant and equipment increased by 12% due to significant investments in units 3 and 4 of the Mochovce Nuclear Power Plant. The group is fully committed to maintaining its investment plan in the period 2020-2024. Total investments in 2019 amounted to EUR 420 million (not including capitalised interest), while in 2018 and in 2017, they amounted to EUR 431 million and EUR 448 million, respectively. Given that the SE Group is currently in a multi-year investment cycle, there are significant liabilities owed to financial institutions.

Comparison of business indicators for the HEP Group, the HSE Group and the SE Group for the period 2017-2019

Below is a table of business indicators for the HEP Group, the HSE Group and the SE Group for the period from 2017 to 2019.

Table 1. Ratio comparison for the period from 2017 to 2019

Name	Calculation	Unit of measurement 2019	HEP Group			HSE Group			SE Group			
			2018	2017	2019	2018	2017	2019	2018	2017		
Liquidity ratios	Current ratio	short-term assets / short-term liabilities	1.75	1.92	1.76	1.07	1.12	1.09	0.93	0.94	0.77	
	Quick ratio	(short-term assets – inventory) / short-term liabilities	1.37	1.52	1.41	0.95	1.01	1.00	0.51	0.61	0.44	
	Financial stability ratio	fixed assets / (capital + long-term liabilities)	0.91	0.90	0.92	0.99	0.98	0.99	1.01	1.01	1.03	
	Net working capital	short-term assets – short-term liabilities	In thousand EUR	464,082	467,637	364,245	19,007	32,323	23,264	-55,592	-57,388	-225,116
Leverage ratios	Leverage ratio	total liabilities / total assets	%	40	40	33	49	49	51	61	63	60
	Equity-to-assets ratio	capital / total assets	%	60	60	67	51	51	49	39	37	40
	Debt-to-equity ratio	total debt (liabilities) / capital		0.66	0.66	0.49	0.95	0.96	1.06	1.54	1.69	1.47
	Equity ratio I	(equity x 100) / fixed assets	%	74.44	73.75	79.89	59.42	59.86	55.73	42.08	40.95	43.85
	Equity ratio II	((equity + long-term liabilities) x 100) / fixed assets	%	110.12	110.61	108.40	101.06	101.77	101.25	99.48	99.40	97.55
	Revenue-to-cost ratio	total revenue / total cost		1.12	1.12	1.12	1.01	0.99	1.00	1.01	1.01	1.04
Profitability ratios	Net profit margin	net profit / total revenue		0.09	0.09	0.09	0.02	-0.01	0.01	0.01	0.01	0.03
	ROA – return on assets	net income / total assets		0.004	0.004	0.005	0.01	-0.01	0.004	0.002	0.002	0.006
	ROE – return on equity	net income / total equity		0.01	0.01	0.01	0.03	-0.01	0.04	0.01	0.005	0.02

Source: Authors

Liquidity ratios

Ratio analysis led us to conclude that the liquidity of the HEP Group was stable during the observation period and that the HEP Group was able to meet its short-term liabilities from short-term assets without difficulty. The current ratio is slightly below the desirable value of 2; however, the quick ratio and the financial stability ratio are satisfactory. Net working capital, which is essential to maintaining liquidity and financial stability, is also favourable. Liquidity ratios of the HSE Group are also satisfactory, although the current ratio is below the desirable value of 2; other liquidity ratios are satisfactory. Liquidity ratios of the SE Group are slightly worse than the ones of the previous two groups. The current ratio and the quick ratio are below 1, which may indicate possible difficulties in meeting current liabilities. Likewise, net working capital is negative, which may indicate difficulties in meeting short-term liabilities. As for the financial stability ratio, the lower the value of this ratio, the greater the financial stability and liquidity, i.e., working capital increases. In all three companies, it has similar values, but it is the worst in the SE Group.

Leverage ratios

Leverage ratios reflect the structure of liabilities and tell us how much of the assets is financed by a company's own capital (equity) and how much of the assets is financed by other people's capital (liabilities). The leverage ratio of the HEP Group shows that in the observation period, 40% (2019 and 2018) and 33% (2017) of the total assets were financed by other people's capital, while the remaining 60% (2019 and 2018) and 67 % (2017) were financed by their equity. On the other hand, the leverage ratio in the HSE Group is slightly worse and is 49% (2019 and 2018) and 51% (2017), while the equity-to-assets ratio is 51% (2019 and 2018) and 49% (2017). The SE Group has the worst leverage and equity-to-assets ratios, i.e., 61% (2019), 63% (2018) and 60% (2017) of total assets were financed by other people's capital.

A desirable value of the equity-to-assets ratio is above 50%, from which it can be concluded that the leverage ratios of the HEP Group, the HSE Group and the SE Group are satisfactory, marginal, and below the desired value, respectively. Such results were expected because the SE Group is currently making a major investment in the process of constructing units

3 and 4 of the Mochovce Nuclear Power Plant, which represents one of the most significant investments in Slovakia, and which made the SE Group take on additional debt.

The debt-to-equity ratio is also satisfactory in the HEP Group and the HSE Group, while it is somewhat worse in the SE Group, although it is still below the upper limit (the upper limit is 2), while in the SE Group, the values are 1.54 (2019), 1.69 (2018) and 1.47 (2017). Equity ratios I and II are favourable for the HEP Group and the HSE Group, while they are marginal for the SE Group.

Profitability ratios

The net profit margin shows how much net profit was made from the total work done on the market, which the company can freely dispose of. The company can pay that part of revenue, i.e., profit after tax, to the shareholders, or leave part of it on the balance sheet as retained earnings. A higher value is preferred here. By comparing the three groups, it can be seen that the HEP Group has the highest net profit margin (0.09 in all three periods), while the net profit margin of the HSE Group and the SE Group ranges from 0.01 to 0.03 (it was negative only in 2018 in the SE Group when the company operated at a loss).

ROA stands for return on assets; it is a profitability ratio that shows how much profit a company generates from its assets. In the observation period, the highest value is recorded in the HSE Group, namely in 2019, when it is 0.01. It is smaller in the HEP Group and the SE Group, and the reason for this is that the total assets of the HEP Group and the SE Group are significantly higher than the assets of the HSE Group. ROE stands for return on equity; it is a profitability ratio that shows how much profit a company generates from its investments or invested capital. It is the same, i.e., 0.01, in all three observation periods in the HEP Group, whereas in the HSE Group it is the highest in 2019 (0.03). In the SE Group, it is the highest in 2017 (0.02), and the lowest in 2018 (0.005).

Revenue-to-cost ratio

The revenue-to-cost ratio shows the relationship between total revenue and total cost, and a value that is as high as possible, or at least 1, is desirable

because it implies that revenue and cost are equal. In the observation period, it is above 1 in all groups (it is the highest in the HEP Group, i.e., 1.12 in all three observation periods), except for the HSE Group in 2018, when it generated a loss.

Conclusion

Financial statement analysis of the HEP Group for the period 2017-2019 showed that this group made a profit in all three observation periods, had no problems with liquidity and was financially stable. The HEP Group has no significant financial liabilities, and the liabilities are met in a timely manner. Comparison of the profit margin of all three groups, for which the highest possible value is desirable, revealed that the HEP Group achieved the highest value in all three periods. In the observation period, the HEP Group was operationally profitable, and profit growth was recorded every year. Given the business results and financial stability, as well as the fact that the existing investments are mostly supported through equity financing, and that the EU-level fund has been announced from which investments in renewable energy sources would be financed, there are no barriers to new significant projects in the field of renewable energy sources.

Operational analysis of the HSE Group in the period from 2017 to 2019 shows that the group made an operating profit in all periods except for 2018, when it made a loss. In the observation period, the group had no problems with liquidity, and its leverage ratios were at acceptable levels. As for the generation mix, the group equally relies on the process of generating electricity from both hydroelectric and thermal power plants. During the observation period, investments that prevailed in the HSE Group aimed at ensuring organisational safety and security, i.e., investments and retrofitting procedures related to generation reliability. The HSE Group started with restructuring measures, the goal of which is long-term decarbonisation of electricity generation and the gradual coal phase-out without a negative impact on the reliability of electricity supply to consumers. It is planned to replace coal with renewable and other low-carbon energy sources. For this reason, the HSE Group is proactive in the field of creating a regulatory framework that will support and enable realisation

of sustainability-oriented development projects and provide the foundations for ensuring an appropriate share of public funds necessary for their implementation.

In the period from 2017 to 2019, the SE Group made an operating profit; however, its business and financial indicators are worse compared to the previous two groups, mostly because it is currently in a multi-year investment cycle and there are significant liabilities owed to financial institutions. Most of the investments relate to the construction of units 3 and 4 of the Mochovce Nuclear Power Plant, whose construction is planned to enable the SE Group to achieve energy independence, meet the energy needs of Slovakia entirely, and focus even more on electricity export. Given that the SE Group generates most of its electricity in nuclear power plants and hydroelectric power plants, it also has low levels of emissions in relation to total electricity generated.

Operational analysis of three EU electricity companies revealed that they approach changes in business models differently with regard to the specifics of the business environment and the development of energy infrastructure, which consequently affects success and stability of their operations through the adjustment of the generation mix. Analysis results show that companies with a higher share of renewables in electricity generation are not necessarily more profitable, which indicates the need to review the profitability of investments in renewable energy sources and to instruct decision makers to encourage such investments through various measures. Given that these are companies that are predominantly owned by the state, political will is required for making such decisions, and therefore it is recommended to make an extra effort in order to make company management recognise the need to invest in significant renewable energy projects as one of the national strategic goals that would ensure greater energy independence of the state.

Research limitations refer to a small sample of energy companies under study and a relatively short period of time of observing their business operations and adapting to EU requirements in terms of greenhouse gas emissions reduction. Therefore, in future research studies, it would be advisable to extend the research time horizon and take into account additional energy companies in order to gain a deeper insight into the state of the EU energy industry.

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IZAZOVI ZELENE TRANZICIJE: IMPLIKACIJE ZA POSLOVANJE ENERGETSKIH TVRTKI

Sažetak

Posljedice klimatskih promjena osjećaju se u svim dijelovima svijeta. Načini predviđanja budućih klimatskih promjena i smanjenja utjecaja ljudi na klimu predmet su brojnih studija. Prijelaz prema klimatskoj neutralnosti na razini EU okosnica je Europskog zelenog dogovora. Riječ je o cilju smanjenja emisije stakleničkih plinova za 55% do 2030. i postizanju klimatski neutralne Europe do 2050. Energetske tvrtke odgovorne su za tri četvrtine emisije stakleničkih plinova u Europskoj uniji, posebice one koje proizvode energiju iz fosilnih goriva. U radu se ispituje učinak napora za smanjenje emisija stakleničkih plinova ulaganjem u obnovljive izvore energije, provedenih kao rezultat usvajanja regulatornog okvira, o poslovnoj i financijskoj uspješnosti triju energetske društava (Hrvatska elektroprivreda – HEP grupa, Holding Slovenske elektrane – HSE grupa i Slovenské elektrárne a.s. – SE grupa) iz Europske unije u trogodišnjem razdoblju (2017. - 2019.). Glavni cilj ovog rada je utvrditi kako se prilagoditi novoj regulativi Europske unije okvir u smislu zelene tranzicije utječe na poslovanje energetske kompanija, fokusirajući se na profitabilnost, likvidnost i financijsku stabilnost. List je otkrio da promatrane tvrtke planiraju ulagati u obnovljive izvore energije i smanjiti ili napustiti korištenje fosilnih goriva u proizvodnji električne energije u skladu s ciljevima Europske unije. Analiza njihovog poslovanja pokazala je da različito pristupaju promjenama poslovnih modela s obzirom na specifičnosti poslovnog okruženja i razvoja energetske infrastrukture, što utječe na uspješnost i stabilnost njihovog poslovanja.

Ključne riječi: analiza poslovanja, energetske tvrtke, obnovljivi izvori energije, zeleno, tranzicija

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LANGUAGE AND POWER – AN INSIGHT INTO THE REGULATORY FRAMEWORK AND PRACTICE OF LANGUAGE ARRANGEMENTS OF THE COUNCIL OF THE EUROPEAN UNION

Scientific paper
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Abstract

The intrinsic nature of language-power relationships has long attracted wide scholarly attention, particularly from the 1980s onwards. In addition to being assigned a classic communication function, language is also seen as a vital tool for demonstrating and exercising political power, that is, a collective power of ethnopolitical communities. This paper looks into the specificities of the language policies of the Council of the European Union both codified and customary, which demonstrate power relations between the Member States of the European Union. The research is based on the legal-dogmatic method as it assesses current positive law, doctrine, concepts, practice, and scholarly literature addressing elements of language arrangements pertinent to the Council. Special emphasis is put on discrepancies between codified rules calling for equality of all EU languages and nurturing linguistic diversity, on the one hand, and daily practices endorsing linguistic imperialism, on the other hand. The paper examines the evolution of language narratives in the founding treaties of the European Union, Council Regulation No. 1/58 determining the languages to be used by the European Union, the Council's Rules of Procedure, and other relevant documents, and compares them with European realities on the ground. Although the regulatory framework governing the work of the Council is more or less clear regarding the equality of the Member States and their official languages, the power gap and language disbalance remain an ever-present element of the EU environment.

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Key words: Council of the European Union, European Law, International Law, language and power

Introduction

For decades, an abundance of scholarly literature has looked into the intrinsic nature of language-power relations. In his address of 1950 on the power of language, Trueman went back in time as far as the Bible to exemplify the earliest traces of the power of the word. By referring to the first verses of the Gospel According to John – “In the beginning was the Word [...]”, Trueman aspired to demonstrate that language was a decisive element in creating humanity since “order [was] created out of chaos by the power of speech” (Trueman, 1950, 566). Hereby, language is portrayed as “discourse” harbouring and reflecting power, and not just an “autonomous construct” referring simply to the system of sentences (Candlin, 1996, vi).

The aim of this paper is to add to fresh theoretical and practical research on specificities of language-power relations by focusing on language arrangements of the Council of the European Union (EU), a core EU body responsible for the co-codification of EU law, alongside the European Commission and the European Parliament. The originality of the research stems from a dual analysis of vast academic knowledge and legislative framework, on the one hand, and personal experience of active engagement in the Council’s work, on the other hand.

The scientific analysis is composed of eight chapters (introductory and concluding remarks included) outlining a wide array of topics, from questioning the language-power interrelatedness to examining the up-to-date Council’s language realities. In the first chapter following the introduction, the paper offers some theoretical considerations of selected academic doctrine reflecting on the symbiosis of language and power. To illustrate the powerfulness a language may entail, a special emphasis is put on the dominating influence of the English language as a *lingua franca*. Since language-power relations are closely intertwined with a question of legal and factual equality of languages, the third chapter outlines the most widely accepted universal and regional norms on non-discrimination with a ground of language in its focus. Thus, the seminal human rights and founding treaties of the United Nations, the Council of Europe, and the

Organisation for Security and Co-operation in Europe are considered in order to put the Council's approach to the equality of languages, addressed in further chapters, in a broader context. Drawing upon the idea behind the EU's motto "*In varietate concordia*" (i.e. "United in diversity"), the fourth chapter examines the overall language policy of the EU based on the principle of linguistic diversity, which calls for developing a sense of equality through effective intercultural dialogue and more inclusive EU institutions and EU society on the whole. Consequently, the original motto is symbolically rephrased as "United in linguistic diversity". Giving considerations to the general linguistic standards of the EU, the fifth chapter provides a detailed assessment of the Council's legislative framework and practice in the area of language arrangements, which aim to strike a balance between equality and efficiency. That is particularly apparent during the six-month rotating presidency of the Council, presented in the sixth chapter. Finally, the closing chapter antecedent to the conclusion sheds light on future prospects of English as a dominant language in the Council, perceived in the light of multi-layered post-Brexit circumstances. The paper's final remarks offer an overarching synthesis of the language-power intersections pertinent to formal and informal aspects of the Council's quotidian work.

Language and Power – Some Theoretical Considerations

Language is a multifaceted notion, which may denote both a content and a medium for conveying the substance. In other words, "it's a whole process" (Cross, 2006, 347), or, as Jeziński vividly argues, "the most complex symbolic construction used by men" (Jeziński, 2003, 181). When juxtaposed with power, language is manifested dually – "as a mechanism through which the power to define" is exercised and "as a device that generates power through the ability to define" (Frug, 1984, 1892). Another example of duality is the connection opened up by Hobbes – "the language of power and the power of language" (Boyle, 1987, 425).

The symbiosis of language and power is most apparent in the political arena, where ideological narratives are repeatedly (mis)used to impose or maintain power (Hristov Anastassov, 2018; Müller, 2008). One way to illustrate the respective language–power conjunction is through the prism

of two mutually interrelated aspects: “power *in* discourse” and “power *behind* discourse” (Fairclough, 1996, 43). “Power *in* discourse” is a power exercised as an expressed word either through direct face-to-face contact or alternate channels, such as literature and media. “Power *behind* discourse” is reflected in a social construct possessing substantial power, be it an official language status or a nation/institution/political party/etc. behind the narrative. The latter facet determining the background of the power of a specific language is at the core of the paper’s analysis.

Language imbalances are a number of times a simulacrum of the imbalances in society, legalised through the force of law (SpearIt, 2012). In fact, language realizes and manifests itself only in the context of society, and as such, reflects the societal hierarchy. According to Curtis, “in a society marked by hierarchy – race-based, gender-based, class-based, and otherwise – language, too, is marked by hierarchy” (Curtis, 2015, 439).

Any comparative study on the political dimension and influence of world languages in transnational communication and international environments, such as international organisations or institutions, inevitably makes a point about the dominance of the English language and its privileged status as a *lingua franca*. Depending on the milieu, the same perception is ever-present with respect to a number of other powerful languages, such as French and Spanish. Such linguistic imperialism upholds the sentiment that in international political fora “language choice matters” and that a language can never be perceived “as a neutral medium of communication” (Berglind Finsen, 2016, 10). The essence of linguistic hegemony in today’s globalised world could be explained by the lingering pressure for as quick, comprehensible, and articulate information as possible. The respective logic is especially important for the pattern-like nature of legal texts or “the fabric of law” (Vogel *et al.*, 2017, 91), where coherence is seen as “a fundamental legal value in its own right” (Solán, 2017, 51). Adhering to one language as the original version of the document may, without doubt, diminish or eliminate interpretative uncertainty, esp. in cases of “ambiguous legal texts that present two or more potential interpretations or vague language with a range of possible meanings” (Mouritsen, 2017, 68). According to Sosoni and Biel, this is particularly apparent in the hybrid EU context, where the complex interplay of supranational and national elements within language and legal cultures may generate “a breeding ground of paradoxes, compromises and tensions” (Sosoni and Biel, 2018,

2). Turning to English as a *lingua franca* in such demanding circumstances comes as a legitimate alternative, which is adept at transcending the challenges of EU multilingualism. After all, English is the most widely used language both by EU institutions and regular EU citizens (Kuzelewska, 2020), with bright prospects for future standing because well over 80% of EU pupils/students study English as a second language (Eurostat, 2018). The dominance of English is deep-rooted in European reality, be it in science, research, diplomacy, technology, international organisations, media, entertainment etc., to the extent that the EU motto “United in Diversity” may be well rephrased into “United in English” (Bajčić, 2018, 13). When examined through the lens of the aspect “power *behind* discourse”, English owes its influence to UK’s and USA’s superior historical roles in financial, capital and trade markets (Bajčić, 2018).

Equality of Languages in International and European Legislation

Language policies of actors in international relations – States, international organisations, multinational enterprises etc. (Wijninga, 2014) vary greatly across Europe and the world alike. However, by and large, as a common denominator, they share an endeavour to strike a balance between equality and efficiency of languages (Berglind Finsen, 2016, 38, 68).

A non-discrimination clause, pertinent to international human rights treaties, always includes language as a ground on which no one should be discriminated against. For example, a milestone treaty in the history of human rights – the 1948 Universal Declaration of Human Rights, stipulates that “everyone is entitled to all the rights and freedoms set forth in this Declaration, without distinction of any kind, such as race, colour, sex, *language*, religion, political or other opinion, national or social origin, property, birth or other status.” (A/RES/217(III), Art. 2 para. 1). Drafted by representatives of remarkably diverse cultural and legal circles, the respective provision reflects the universally accepted principle of equality, applied on language to the same degree as on any other ground of discrimination listed therein. The same non-discrimination clause was later on incorporated in all the other core universal human rights treaties, such as the 1966 International Covenant on Civil and Political Rights

(A/RES/2200(XXI), Art. 2 para. 1), the 1966 International Covenant on Economic, Social and Cultural Rights (A/RES/2200(XXI), Art. 2 para. 2), and the 1989 Convention on the Rights of the Child (A/RES/44/25, Art. 2 para 1).

Analogously to realities at the universal level endorsed by the United Nations, language as a protected element has been traditionally embedded in the seminal European human rights treaties too. In view of the fact that the EU legal framework is examined in detail in the following chapters, the emphasis in this one is put on the Council of Europe and the Organisation for Security and Co-operation in Europe (OSCE) only. The 1950 Convention for the Protection of Human Rights and Fundamental Freedoms encompasses language by its provision on the prohibition of discrimination, which reads as follows:

“The enjoyment of the rights and freedoms set forth in this Convention shall be secured without discrimination on any ground such as sex, race, colour, *language*, religion, political or other opinion, national or social origin, association with a national minority, property, birth or other status.” (ECHR, Art. 14).

Half a century later, a general prohibition of discrimination comprising language, extended to any right set forth by law in general, was introduced by 2000 Protocol No. 12 to the respective Convention (Protocol No. 12, Art. 1 para. 1). A similar non-discrimination clause indicating language as a possible ground of discrimination was introduced in the founding treaty of the OSCE – the 1975 Helsinki Final Act, in its constituent Declaration on Principles Guiding Relations between Participating States. In other words, the two most prominent European organisations in the domain of promotion and protection of human rights – the Council of Europe and the OSCE are entirely devoted to and vigorously guarantee the equality of all persons with respect to language. Under the auspices of the Council of Europe, the value of multilingualism is particularly protected by the 1992 European Charter for Regional or Minority Languages as “an important contribution to the building of a Europe based on the principles of democracy and cultural diversity within the framework of national sovereignty and territorial integrity.” (ECRML, Preamble). Although adopted specifically for the protection and promotion of languages used by traditional minorities, it does not conceive a competitive or antagonistic relationship

with official languages but rather linguistic diversity and multilingual values as “one of the most precious elements of the European cultural heritage” (Explanatory Report, Points 14 and 26).

Given the large membership of the UN (193), the Council of Europe (46), and the OSCE (57), it comes as no surprise that they had to evade the literal application of the principle of non-discrimination of languages in the name of efficiency of their daily affairs. For the UN, the prime example of its language policy remains the provision of its founding document, which specifies that the equally authentic languages of the Charter of the UN deposited in the archives of the Government of the USA are Chinese, French, Russian, English, and Spanish (Charter of the UN, Art. 111). Nowadays, Arabic is also added to the list as one of the six official languages of the UN, as stipulated by the Rules of Procedure of the UN General Assembly, the Security Council, and the Economic and Social Council (GA Rules of Procedure, Rule 51; SC Rules of Procedure, Rule 41; ECOSOC, Rule 31). The Council of Europe limited the number of its official languages to two – English and French, with the derogation allowing its principal bodies – the Committee of Ministers and the Consultative Assembly to “determine in what circumstances and under what conditions other languages may be used” (Statute of the Council of Europe, Art. 12). Owing to its diverse and large membership, the approach of the OSCE to official languages is as broad as the UN’s, *i.e.* there are six of them: English, French, German, Italian, Russian, and Spanish, as noted in the closing lines of the 1975 Helsinki Final Act.

Language Policy of the European Union – United in (Linguistic) Diversity

Linguistic diversity is deeply rooted in the rich European heritage as its indivisible element. As a consequence, respect for linguistic diversity is imposed on its institutions and the Member States *expressis verbis* in some of the key EU documents. Namely, the Treaty on the European Union regulates that the EU “shall respect its rich cultural and *linguistic diversity*, and shall ensure that Europe’s cultural heritage is safeguarded and enhanced.” (TEU, Art. 3), while the Charter of Fundamental Rights of the

European Union lays down that the EU “shall respect cultural, religious and *linguistic diversity*.” (Charter of Fundamental Rights, Art. 22).

At the very base of the legal and thus factual protection of linguistic diversity in the EU institutions is Council Regulation No. 1 determining the languages to be used by the European Economic Community (EEC), adopted in 1958 (OJ L17, 1958). The curiosity is that at the time, Council Regulation No. 1 inaugurated just four official and working EU languages – Dutch, French, German, and Italian (Art. 1), with no English in sight as the most widely used language in the EU. The reason behind such a choice is simple and logical – those were the official languages of the six founding Member States of the EEC: Belgium, France, Germany, Italy, Luxembourg, and the Netherlands. A short document of only eight articles governs a vast area of EU intercommunication encompassing EU institutions, the Member States, and individual persons subject to the jurisdiction of a Member State. The respective rules on the use of official languages prescribe that the documents submitted to the institutions of the EEC could be drafted in any official language selected by the sender, and, expectedly, the answer should be drafted in the same language (Art. 2). Similarly, documents submitted by an EU institution to the Member State or a person under the jurisdiction of a Member State should be submitted in the language of that particular State (Art. 3). Regulations and documents of general application are drafted and published in the Official Journal in all the four official languages (Arts. 4 and 5). These rules were applied *mutatis mutandis* every time the number of official EU languages increased, up to the present 24.

The enlargement of the EEC and, later on, the EU led to seven successive modifications of Council Regulation No. 1, which flexibly adjusted to the changing times of increased EU membership. The amendments were generated by the accession of Denmark, Ireland, and the UK (OJ L72, 1972 and OJ L2, 1973), Greece (OJ L291, 1979), Spain and Portugal (OJ L302, 1985), Austria, Sweden, and Finland (OJ C241, 1994 and OJ L1, 1995), Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia (OJ L236, 2003 and OJ L156, 2005), Bulgaria and Romania (OJ L363, 2006), and Croatia (OJ L158, 2013). So, following the accession of Croatia to the EU on 1 July 2013, the official and working languages of the EU institutions became Bulgarian, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French,

German, Greek, Hungarian, Irish, Italian, Latvian, Lithuanian, Maltese, Polish, Portuguese, Romanian, Slovak, Slovenian, Spanish, and Swedish (OJ L17, Art. 1).

It is widely understood that the employment of all 24 official EU languages helps develop a sense of equality, productive intercultural dialogue, and more inclusive EU institutions and EU society on the whole (Berglind Finsen, 2016). Nevertheless, a number of internal administrative and regular business activities would be long delayed if every single document or official public announcement should be translated into all the official EU languages. As elaborated in the following chapters on the Council's language policy, a prompt, unambiguous, and efficient response at the level of EU institutions is crucial. In consequence, it is often necessary to simplify the fair EU language policy at the expense of the absolute equality of 24 official languages by opting for a limited number of procedural or working languages to save time, human resources, and smooth intercultural communication.

Legislative Framework and Practice of the Council of the European Union – Equality vs. Efficiency

In general, the language policy of the Council is as inclusive as possible. The online default language policy determines that all content available to the public should be published in all official EU languages. However, there are two other variations, *i.e.* exceptions to the respective rule, which include publishing the content only in English or in English and French, and publishing the content in English, French, and any other relevant languages. A particularly important content includes details regarding the Council and the European Council meetings as it outlines the topics and dynamics of the codification process of the European law. More concise details about meetings, *e.g.* the main points for discussion and a summary of the main decisions taken at each meeting are available in all official EU languages. On the contrary, more lengthy documents with elaborate information are published either in English and French or in English only (Consilium I, 2022).

The translation services of the Council's General Secretariat work continuously to prepare necessary documents for the Council's meetings in all

the required languages (Consilium II, 2022). An act can be adopted if it is revised by legal and linguistic experts in all 24 languages (until recently, 23 as the derogation for Irish was applied⁴⁷) (Euractiv, 2015). The item cannot be included in the final meeting agenda if a Commission's proposal is not provided in all the Council's official languages. However, the Council can use its discretion to include it nonetheless if the related Member States' decision is reached unanimously. According to the Council's Rules of Procedure on deliberations and decisions based on documents and drafts drawn up in the languages provided for by the language rules in force, "except as otherwise decided unanimously by the Council on grounds of urgency, the Council shall deliberate and take decisions only on the basis of documents and drafts drawn up in the languages specified in the rules in force governing languages." (Council's Rules of Procedure, 2009, Art. 14 para. 1). In addition, "any member of the Council may oppose discussion if the texts of any proposed amendments are not drawn up in such of the languages referred to in paragraph 1 as he or she may specify." (Council's Rules of Procedure, 2009, Art. 14 para. 2). As noted above, the Council may deviate from its standard language policy within the ordinary legislative procedure only on the grounds of urgency. A prime example of such an urgent procedure is the adoption of two 2020 Coronavirus Response Investment Initiatives (CRIIs) during the Croatian Presidency of the Council of the European Union, which were adopted in one of the fastest legal procedures in the history of the EU (Mazur Kumrić and Zeko-Pivač, 2021).

Due to an all-encompassing and open linguistic approach of the Council, its linguistic workload is immense and impressive. On a day-to-day basis, around 30% of the Council's staff helps Member States' representatives work in their respective languages smoothly and continuously. Around 13 000 translation requests are handled every year, with around one million pages of translated text being delivered monthly (Consilium II, 2022).

47 The Irish language gained full status as an official EU language on 1 January 2022. By that date, it was first considered as a Treaty language from 1973 to 2007 (*i.e.* the EU treaties only were translated into Irish), and afterwards, from 2007 to 2022, as an official and working EU language limited by the Council's special derogation because of constraints of Irish translation staff and language technological resources. (Department of Foreign Affairs of the Republic of Ireland, 2021).

An Insight into Linguistic Peculiarities of the Rotating Presidency of the Council of the European Union

The Council has a rotating presidency, *i.e.* the Member State holding the presidency changes every six months. Each new presidency takes a different approach to its language arrangements – for the most part, the presidency opts for English as a working language at the Council’s (formal and informal) meetings and of written procedures and documents for ease of reference. However, certain Member States resort to the exclusive use of their official language, symbolically demonstrating their power, influence, and importance in the EU through – language (Consilium II, 2022).

The French presidency of the first half of 2022 is one of the prime examples of the latter attitude, which strategically promotes the preferential use of its own official language. At the basis of such an approach is France’s historically dominant position within the EU stemming from its unique status as a founding member of the EU, size, and economic wealth as well as its overall power in international relations. In practice, that meant the French presidency imposed the exclusive use of the French language in all the meetings, notes, and debates (Politico, 2021). However, on a number of occasions, it provided simultaneous translations in English to facilitate the Council’s uninterrupted and coordinated work. In general, all the principal meetings were conducted in French, with translations available in other official EU languages. Even documents issued as a follow-up were first provided in French, and the same principle was also applied to the preparatory meetings preceding the main events (Politico, 2021).

What is particularly worthy of note was France’s approach to those who wanted to learn French shortly before or during the French presidency, knowing that a significant number of diplomats participating in the Council’s work did not master the French language. The French Government secured extra funds to offer premium free-of-charge French courses to civil servants ranging from group to head-to-head classes.

The language policy of the French presidency was closely related to French-English power relations. However, France was not the only Member State to insist on using its official language in the Council. For example, Germany did the same during its presidency in the second half of 2020. The difference between their respective approach is that France

made additional efforts to culturally increase the importance of its language, which has always been considered a key language of diplomacy. Although such language policy considerably augmented the visibility and potentiality of the French language in the Council, it did not devalue the employment of English. As it is argued in the following chapter, in times when it is critical to send a quick and accurate message on a number of highly relevant issues, opting for English saves time, eliminates language gaps, and ensures precision.

Some Reflections on Future Prospects of the English language in the Council – How Bright They are?

Considering the central role of English within the language policies of the Council and the EU alike, a question arises as to whether the Brexit after-effects would diminish its overall influence and usage. Currently, only two relatively small Member States in the Council use English as their official language – Ireland and Malta. However, even for them, English is only an alternative, used in parallel with Irish and Maltese. For everyone else, English can be interpreted as the second-best choice. Nevertheless, English is the most widely spoken foreign language comprising 40% of overall EU speakers compared to approximately 12% of speakers of French and German (Debating Europe, 2021). As such, it is often characterised as a *lingua franca*, *i.e.* a language transcending the boundaries of its country of origin, because many people learn it to communicate with others who are not necessarily native speakers (Stanojević and Josipović Smojver, 2011).

English is actively spoken at the EU institutions by a large number of people whose level of knowledge varies significantly. Hence, over time, it evolved into a peculiar version or versions of its standard form. Broder Carstensen explains that English, as the most important language of wider communication, found its way to all corners of the world and developed a number of new varieties that were not native. He argues that English used in this manner is a kind of a Euro-English variant, which differs from the original English language model (Carstensen, 1986). Consequently, Euro-English is regarded as English of all the EU Member States, except for the UK and Ireland. That kind of language is not homogeneous and it changes, when being used, from north to south (McArthur, 2002).

Some authors consider Euro-English as a potential independent variety of English in Europe that evolves as a result of nativization and institutionalization (Mollin, 2006), whereat nativization is defined as a linguistic readjustment that language undergoes when being used by speakers with different backgrounds (Kachru, 1992). According to Forche, Euro-English does not currently exist as an independent variant but taking into account its generally high acceptability rates, “the acceptance of an International English and thus the appreciation of English as a decontextualized lingua franca – future institutionalization may be possible under the influence of young mobile Europeans” (Forche, 2012, 473).

As a widely represented language in the Council and other EU institutions, it is beyond a shadow of a doubt that English will continue to be extremely important for the functioning of the EU in the post-Brexit era. After Brexit, there is no large EU Member State where English is the official language; however, its future prospects do not seem to be in question bearing in mind that today 27 Member States accept it as the most common tool for communication within EU institutions. As demonstrated earlier, the Council’s English is a living entity, which adapted to changing circumstances and morphed into so-called Eurospeak (Iosif, 2010) as a close metaphor for Orwell’s Newspeak (Orwell, 1949). Is there an alternative for (Euro-) English in the Council and EU institutions at large? There certainly are some other powerful EU languages, which are competitive with English, such as French, German, or Spanish; however, European realities do not impose them as eventual successors.

Conclusion

The example of the Council’s language setup confirms the multifaceted character and complexity of language-power intersections. Although embedded in the common EU language policy, the Council’s linguistic framework developed specific *sui generis* contours flexibly adjusted to its unique membership, roles, and procedures. In general terms, respective authenticities can be summarised in three points.

First, the Council accommodates representatives of 27 linguistically diverse Member States, balancing between the obligation to safeguard their equality, on the one hand, and the need to differentiate on language

grounds when requests for efficiency require so, on the other hand. The large membership in which each entity is recognised the right to use its official language is an authentic feature, uncommon to other comparable bodies both at the European and universal levels.

Second, the Council is a dynamic and flexible institution that adapts its language scheme to actual needs on the ground, allowing a considerable leeway to use the official language of each Member State whenever possible. Such adaptability is manifested at all types of meetings, from those of the working party to ministerial and heads of state or government ones. On those occasions, language-power relations become particularly evident as the frequency of use of certain “more powerful” languages prevails over the “weaker” ones.

Third, the Council’s multilingual environment may serve as a determinant of the future prospects of (Euro-) English as a current *lingua franca* within the EU institutions and the possible evolvement of other languages into that privileged category.

Despite the efforts of the regulatory framework governing the work of the Council to promote the equality of the Member States and their official languages, the power gap and language disbalance remain an ever-present element of the EU environment.

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JEZIK I MOĆ – UVID U REGULATORNI OKVIR I PRAKSU JEZIČNOG UREĐENJA VIJEĆA EUROPSKE UNIJE

Sažetak

Intrinzična priroda odnosa jezik-moć dugo je privlačila široku pozornost znanstvenika, osobito od 1980-ih nadalje. Osim što mu je pripisana klasična komunikacijska funkcija, jezik se promatra i kao vitalno oruđe demonstracije i ostvarivanja političke moći, odnosno kolektivne moći etnopolitičkih zajednica. Ovaj rad istražuje specifičnosti jezične politike Vijeća Europske unije, kako kodificirane tako i običajne, koje pokazuju odnose moći između država članica Europske unije. Istraživanje se temelji na pravno - dogmatskoj metodi jer procjenjuje važeće pozitivno pravo, doktrinu, koncepte, praksu i znanstvenu literaturu koja se bavi elementima jezičnog uređenja relevantnog za Koncil. Poseban naglasak stavlja se na nesklad između kodificiranih pravila koja pozivaju na ravnopravnost svih jezika EU i njegovanja jezične raznolikosti, s jedne strane, i svakodnevne prakse koja podržava jezični imperijalizam, s druge strane. Rad ispituje evoluciju jezičnih narativa u osnivačkim ugovorima Europske unije, Uredbi Vijeća br. 1/58 o određivanju jezika koji će se koristiti u Europskoj uniji, Poslovniku Vijeća i drugim relevantnim dokumentima te ih uspoređuje s europske stvarnosti na terenu. Iako regulatorni okvir koji uređuje rad Vijeća manje-više je jasan u pogledu ravnopravnosti država članica i njihovih službenih jezika, jaz u moći i jezična neravnoteža ostaju uvijek prisutni element okruženja EU.

Ključne riječi: Europsko pravo, jezik i moć, Međunarodno pravo, Vijeće Europske unije

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THE POWER OF INTERNET SERVICE PROVIDERS (ISPS) OVER DIGITAL LIFE – CIVIL LAW INSIGHT***

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Abstract

In this paper, the issue of the power the Internet Service Providers (ISPs) have over people's digital lives is examined through the following examples: inheritance of digital assets, users' rights over digital content and their inability to transfer it after purchase, and implicit consent to unexpected clauses found in ISPs' Terms of Service (ToS). This paper draws attention to the rules most people accept daily, without even noticing them or knowing what the consequences of their acceptance are.

1) In the context of inheritance, after users die, ISPs will usually not allow their heirs to access their digital assets and accounts, even if users stated the opposite in their wills. This can pose problems, both for the heirs because many of those assets have a real monetary and emotional value, but also to ISPs, because many of them have faced lawsuits from heirs wanting access to deceased's accounts.

2) The issue of the rights users hold over digital content polemicalizes those situations in which a person, after purchasing certain digital content, does not become its owner, but acquires only the right of use, until death. Therefore, he/she cannot transfer those assets to anyone, both during his/her life and after death. If he/she would do so, it would, in case of most digital content, constitute copyright infringement.

3) In terms of consent, users often accept various clauses that ISPs put in their ToS, some of which are not expected to be a part of ToS. Some of them have little or nothing to do with the purpose that the users intended to achieve on ISP's websites. In a hurry to use ISP's services, a person may accept many conditions that he/she might not accept in the physical world, which, in turn, might lead to court proceedings after the user becomes aware of what he/she has consented to.

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The authors methodologically deal with the stated issue using analysis, compilation, and case methods, trying to reach valid (civil) legal conclusions. In this regard, the basic problems of the paper will be elaborated analytically, by using valid domestic and foreign civil law literature. Stated conclusions are supported by concrete examples that appear in the (IT) practice.

Key words: digital assets, inheritance of digital assets, Internet Service Provider – ISP, use of digital assets, Terms of Service (ToS)

Introduction

Internet Service Providers (ISP) offer a variety of services. ISPs' websites are used to buy or sell goods and services, socialize, and advertise, send or receive messages, and store various content. All this is done in a digital environment, whose rules, in a way, differ from the ones that exist in the physical world. Many people, for some reason, do not take the digital environment as seriously as they do the physical one. Most move through the digital landscape not knowing what the rules are, and who makes them. However, those rules apply to all who want to procure a service from an ISP. And ISPs make those rules. Those rules are put in Terms of Service (ToS) that are shaped into wrap contracts, mostly in clickwraps and browserwraps (Daiza, 2017; Grochowski, 2019). In this paper, the authors will not deal with the characteristics of various wrap contracts, however, it is important to briefly mention them, since they are the ones dictating the relationship between ISPs and users.

Wrap contracts are contracts of adhesion and they are composed in a take it or leave it fashion – the one composing them (ISP) does not offer the other party (a user) an opportunity to negotiate (Matić, 2008). A user can only accept them as they are or refuse them and forfeit whatever services he/she wanted from an ISP. This is the source of the immense power ISPs hold over digital life and digital commodities.

For example, for all our lives, we were aware that everything we had (both rights and obligations) will be inherited by our heirs, after we die (Art. 5 of Croatian Inheritance Act, IA). However, many of the items that once existed only in a physical form are now digital and therefore, intangible. Today they only exist as ones and zeros, stored on various electronic devices or on ISPs' platforms. When it comes to inheritance, digital assets stored on deceased's devices are inheritable, since the devices exist in a

physical world, so they themselves are inheritable together with their content. But digital assets stored on various digital accounts will most likely not be inherited, since most ISPs prohibit the transfer of those accounts.

Digital content purchased from ISPs is not owned by users; they can only use it for the duration of their lives (licensed digital content). Users are prohibited to transfer licensed digital content in any way, while they live and after they die. Most users are not aware that this applies to them and to the digital content they have purchased, so they wrongfully assume they can treat it the same way as they would its tangible counterparts. In this part, exhaustion doctrine in regard to digital content is also explained, with the emphasis on decisions of Court of Justice of the European Union (CJEU), to show which digital content, and why, cannot be transferred by users.

While agreeing to ToS, users are usually not aware of what they have agreed to. Most users do not read ToS because they are long, ambiguous and their content cannot be influenced, therefore, many users believe that there is no point in reading them anyway (some commentators literally call them “unreadable”, Benoliel and Becher, 2019). Since ISPs are aware that users do not acquaint themselves with ToS, they often take advantage of this and put clauses in ToS that either have little to do with the transaction the user wanted or clauses that put users at a disadvantage while giving ISPs rights they might not otherwise have. Making users accept ToS that they do not read or understand is a great way to exert power over user’s digital life – many users accept various clauses in digital form that they would probably never accept if they were written on paper.

This paper will consist of 3 main parts: the first part will deal with the inheritance of digital assets and their advantages and obstacles as well as possible solutions to these problems. The second part will deal with the rights users have over purchased digital content and reasons why subsequent transfer of this content is not allowed. The third part will concentrate on users’ implicit consent to surprising and unusual clauses found in ToS and possible ways of ensuring users’ attention is drawn to them or on ways of prohibiting them altogether.

Inheritance of digital assets and digital accounts

Many assets that were tangible in the past, today often exist only in a digital form and are stored on computers, smartphones, flash drives, email accounts, clouds, social media, and the like (Arnold, 2013; Klasiček, 2018). After their owner dies, it might not be clear who, if anybody, inherits them. The reason for this is that the law in many countries does not specifically deal with the inheritance of digital assets. This is also the case in Croatia and general rules of inheritance law should apply accordingly (Matanovac Vučković and Kanceljak, 2019).

However, things are not so simple when it comes to inhering digital assets stored on ISPs' platforms. In those instances, ISPs will actually decide what will happen to those assets after the user dies (Banta, 2017). Many ISPs' ToS have similar rules concerning the transferability of an account during user's life and after his/her death – they prohibit it (Banta, 2014; Krecizer-Levy and Doeyets-Kedar, 2019; Grochowski, 2019). Because of that, some commentators even state that ToS violate a basic principle of succession law – freedom of testation – since they prohibit heirs from inheriting deceased's accounts and its content, even if that was his/her wish written in a will (Banta, 2014, 2016, 2017; Borden, 2014; Darrow and Ferrera, 2007; Grochowski, 2019; Ronderos, 2017; Truong, 2009; Watkins, 2014). Since ISPs decide what will happen to users' accounts and their content after users die, they will either choose to delete the account and its content or leave it on their servers indefinitely (Banta, 2014; Ronderos, 2017). Regardless of what they decide, one thing is certain: heirs will not benefit from it.

Nonetheless, there are many advantages to digital inheritance. For instance, some digital assets have real monetary value (Banta, 2014; Edwards and Harbinja, 2013; Harbinja (a, b), 2014). For example, a few years ago, a virtual space station on Entropia Universe (an online gaming platform) was sold for \$635,000 (Klein and Parthemer, 2016). If its owner died, his/her heirs would certainly benefit from inheriting the digital asset. Of course, most people's digital assets do not have that kind of monetary value, but they certainly have great emotional value to user's heirs (Banta, 2014; Calem, 2010; McCarthy, 2015). Additionally, if heirs are denied access to the deceased's email accounts, clouds, etc., the rest of their inheritance might suffer, since most people today store their business, banking,

and other information on their digital accounts. Therefore, if heirs cannot access them, they might lack important information about the deceased's business and other important parts of the inheritance, which might lead to serious damages (Banta, 2014; Cahn, 2014; Grochowski, 2019; McCarthy, 2015; Tarney, 2016). Also, certain assets could lose their value if they are not accessed and managed for too long. For example, a website that generates income, if not accessed for some time, might lose its value quickly (Klasiček, 2018). Furthermore, many people receive their bills through email, so if heirs cannot access the deceased's email account, bills will not be paid and penalties might pile up (Beyer and Cahn, 2013).

Although ISPs, as a rule, do now allow heirs to access deceased's account, case law both in the US and in the EU shows that, if heirs are persistent enough, they might have success in gaining access to the deceased user's accounts. Here the authors will only mention two such cases: in the US, one of the first cases of heirs obtaining access to deceased's accounts was the case of Justin Ellsworth's email account (*In re Estate of Ellsworth, No. 2005-296, 651-DE (Mich. Prob. Ct. Mar. 4, 2005)*). After his death, Yahoo! refused to grant family members access to his account. Finally, after a legal battle, the judge ordered Yahoo! to give Ellsworth's father access to it (Edwards and Harbinja, 2013). In the EU, a judge also decided that the deceased's Facebook account is inheritable and that user's parents have the right to access the account and its content (Bundesgerichtshofs decision of 12 July 2018, III ZR 183/17⁵⁰).

Of course, all of these (and similar) cases were decided after the user's death, following their family members' requests to access the accounts. Users themselves were not given an opportunity to decide what will happen to their accounts *postmortem*. However, there are ISPs that started offering users a chance to decide in advance what will happen to their account and its content after they die. Examples of how this could be done can be found in ToS of some of the most popular ISPs in the world today: Facebook and Google.

1. A) Default rules: Facebook's policy is to memorialize accounts if a family member, or a close friend, informs Facebook that the user has

50 <https://juris.bundesgerichtshof.de/cgi-bin/rechtsprechung/document.py?Gericht=bgh&Art=en&nr=86602&pos=0&anz=1> (accessed on November 9, 2022)

died.⁵¹ Verified immediate family members can also request the removal of a deceased's account from Facebook.⁵²

B) User's choice: However, Facebook has a feature that allows users to decide, while they are still alive, what will happen to their accounts *post-mortem*: Facebook users can either appoint a legacy contact to look after their memorialized account or choose to have the account permanently deleted after they die.⁵³

A person chosen to be a legacy contact will be able to accept friend requests on behalf of a memorialized account; change the cover photo and profile picture and also pin a tribute post to the profile. If the memorialized account has an area for tributes, the legacy contact will be able to decide who can see tributes and who can post them.⁵⁴

On the other hand, if a deceased user wanted his/her account deleted, after Facebook is notified of his/her death, it will delete all messages, photos, posts, comments, reactions and information immediately.⁵⁵

2. A) Default rules: If a Google user dies, immediate family members and representatives can request this user's account to be closed and, under certain circumstances, Google will provide them with the content of the deceased user's account (without passwords or other login details). All of this can happen only after a careful review of family members' or representatives' request.⁵⁶ It is also possible for family members or representatives to request ownership transfer of a deceased user's domain.⁵⁷

B) User's choice: Like Facebook, Google also lets users take certain steps while they are still alive. Google offers a feature called Inactive Account Manager: users can choose whether someone will have access to their

51 https://www.facebook.com/help/150486848354038?helpref=faq_content (accessed on November 10, 2022)

52 https://www.facebook.com/help/1518259735093203/?helpref=related_articles (accessed on November 10, 2022)

53 <https://www.facebook.com/help/103897939701143> (accessed on November 11, 2022)

54 https://www.facebook.com/help/1568013990080948?helpref=faq_content (accessed on November 11, 2022)

55 <https://www.facebook.com/help/103897939701143> (accessed on November 11, 2022)

56 <https://support.google.com/accounts/troubleshooter/6357590?hl=en> (accessed on November 11, 2022)

57 <https://support.google.com/domains/answer/9389610?hl=en> (accessed on November 11, 2022)

information after they die, or if their account will be deleted.⁵⁸ It is also a way to notify someone (a trusted contact) in case an account was inactive for a certain period of time. If an account was inactive for a specified time, a trusted contact (or several) will be informed. They will not be notified during setup, so it is possible for a person not to know that he/she has been chosen as a trusted contact. After a certain period of inactivity, a trusted contact will receive an email that the user wrote during setup, with a footer added by Google. If a user decided to share certain content with a trusted contact, the email will contain a list of data that is to be shared, and a link to download the data.⁵⁹

These are good examples of ISPs offering users a choice of what will happen to their accounts and their content after their death. It would be advisable that other ISPs adopt similar policies. However, so far, if an ISP mentions user's death in ToS at all, it is to offer users' family members or representatives a possibility to request account deletion and/or memorialization.⁶⁰

Users' rights over digital assets

Digital content can be created by users or by someone else and purchased by users from ISP's websites (Matanovac Vučković and Kanceljak, 2019). ISPs usually explicitly state that users own digital content they create and store on their platforms,⁶¹ but when it comes to digital content that the user has purchased from ISPs' websites, their ToS state that only a license to use the digital content (e-books, music, videos, games, apps, software) was acquired, not the content itself (Matanovac Vučković and Kanceljak, 2019). Therefore, regardless of the fact that users usually have to click "buy" or some similar phrase in order to access digital content, it is not actually sold or bought, because to buy something means to acquire

58 <https://myaccount.google.com/inactive?pli=1> (accessed on November 11, 2022)

59 <https://support.google.com/accounts/answer/3036546> (accessed on November 11, 2022)

60 Twitter: <https://help.twitter.com/en/rules-and-policies/contact-twitter-about-a-deceased-family-members-account> (accessed on November 15, 2022); Instagram: https://help.instagram.com/264154560391256/?helpref=search&query=deceased&search_session_id=ed2e2e06e1c0cf0dd7665b69d8255823&sr=1 (accessed on November 15, 2022); LinkedIn: <https://www.linkedin.com/help/linkedin/answer/2842/deceased-linkedin-member?lang=en> (accessed on November 10, 2022)

61 <https://www.facebook.com/legal/terms> (accessed on November 15, 2022)

ownership (the sale agreement is one of the most common ways of obtaining ownership, Vedriš and Klarić, 2014; Eichler, 2016).

Hence, an ISP only transfers the right to use the said digital content. This means that the user is not allowed to “redistribute, transmit, assign, sell, broadcast, rent, share, lend, repurpose, modify, adapt, edit, license or otherwise transfer’ it”.⁶² Most users are not aware of this and wrongly assume that, once they have purchased digital content, they became its owners and can do with it as they please (Reis, 2015). This is not so unusual because users do have many of the rights owners have – the right to use, the right to possess, the right to exclude others (these are typical rights an owner has according to Art. 30/1 of Croatian Ownership and Other Proprietary Rights Act; Banta, 2017). However, there is one important right missing – the right to transfer.

Inability to transfer digital content purchased from an ISP applies not only while a person is alive, but also after he/she dies. Some TOS do not mention what will happen to the purchased digital content after their user dies, while others prohibit inheritance explicitly (Banta, 2017; Watkins, 2014). However, even in those instances when ToS do not mention transfer *postmortem*, it can be deduced that it is not allowed, since most ToS state that any transfer of purchased digital content is prohibited. Regardless, here too, if heirs are determined enough, they might be granted access to the deceased’s digital content that he/she has purchased from an ISP. An example of this happening comes from the US, where a widow managed to get a court order to access her deceased husband’s Apple account (Mayo, 2016; Banta, 2017). However, this will only happen if heirs remain persistent enough and manage to get a court order.

Main reasons why users believe they own digital content purchased from ISPs are, firstly, they do not read ToS and, secondly, they treat digital content the same as its tangible counterpart – they think that if they have paid for it, they can do with it as they please. However, there is one crucial difference between tangible and digital content: owners of copies of tangible copyrighted works can indeed, under exhaustion of rights doctrine, sell, donate, bequeath or borrow their copies (Art. 34/4 of Croatian Copyright

62 ‘Amazon Music Terms of Use’ (*Amazon*, last updated on Sept 14, 2021), <https://www.amazon.com/gp/help/customer/display.html?nodeId=201380010> (accessed on November 15, 2022)

See also e.g., ‘Apple Media Services Terms and Conditions’, <https://www.apple.com/legal/internet-services/itunes> (accessed on November 15, 2022)

and Related Rights Act; Art. 4/1 of Directive 2001/29/EC of the European Parliament and of the Council of 22 May 2001 on the harmonization of certain aspects of copyright and related rights in the information society⁶³, Henneberg, 1996). In the case of digital content obtained from ISPs, users cannot do the same, since exhaustion doctrine does not apply to digital content.

The reason behind ISPs' ban of the transfer of digital content is copyright protection. Transfer of digital content infringes copyright because if a digital file would be transferred to another device, RAM of the recipient's device would have to create a copy of the file that needs to be transferred, because this is the only possible way to achieve the transfer of digital content (Eichler, 2016; Schjønby-Nolet, 2019). So, one copy will remain on the first device and a new copy will be created on a second device. If the file that is being transferred contains copyrighted work, this would mean violation of copyright owner's reproduction right, because his/her permission to create a copy is lacking.

There are two landmark cases decided by the CJEU that the authors believe are important to mention here in order to shed the light on what might happen to users redistributing digital content. The authors will not dwell on details of those cases, only on points of CJEU decisions that are important for this paper.

In *UsedSoft*⁶⁴, CJEU took a stand that the copyright owner cannot prevent the licensee, who has downloaded a software, from reselling his/her license. CJEU concluded that Art 4 of Directive 2001/29 applies to downloaded software. Art. 4 governs distribution rights and the Court ruled that downloading software amounts to a sale. Therefore, exhaustion doctrine applies to software (p. 61 *“It should be added that, from an economic point of view, the sale of a computer program on CDROM or DVD and the sale of a program by downloading from the internet are similar. The on-line transmission method is the functional equivalent of the supply of a material medium. Interpreting Article 4(2) of Directive 2009/24 in the light of the principle of equal treatment confirms that the exhaustion of the distribu-*

63 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32001L0029-current-consolidated-version> (<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02001L0029-20190606>) (both accessed on November 15, 2022)

64 *UsedSoft v. Oracle International Corp.*, <https://curia.europa.eu/juris/document/document.jsf?docid=124564&doclang=EN> (accessed on November, 15, 2022)

tion right under that provision takes effect after the first sale in the European Union of a copy of a computer program by the copyright holder or with his consent, regardless of whether the sale relates to a tangible or an intangible copy of the program.”; and p. 72 of the decision: “...distribution of a copy of a computer program is exhausted if the copyright holder who has authorised, even free of charge, the downloading of that copy from the internet onto a data carrier has also conferred, in return for payment of a fee intended to enable him to obtain a remuneration corresponding to the economic value of the copy of the work of which he is the proprietor, a right to use that copy for an unlimited period.”). This is also in accordance with Directive 2009/24/EC of the European Parliament and of the Council of 23 April 2009 on the legal protection of computer programs, which constitutes a *lex specialis* in relation to Directive 2001/29.

On the other hand, in *Tom Kabinet*⁶⁵ CJEU took a stand that what applies to software cannot apply to e-books since that was not the intention of EU legislature when it adopted Directive 2001/29 (p. 56 of the Decision). Therefore, in this case, Art 3 of the Directive 2001/29 should apply, which means that supplying e-books to the public for unlimited time by downloading constituted communication with the public and there is therefore no exhausting of rights (regarding communication to the public, see also Act 17 of Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC⁶⁶). The rationale behind this decision is best revealed in p. 58 of the ruling: “*The supply of a book on a material medium and the supply of an e-book cannot, however, be considered equivalent from an economic and functional point of view. As the Advocate General noted in point 89 of his Opinion, dematerialised digital copies, unlike books on a material medium, do not deteriorate with use, and used copies are therefore perfect substitutes for new copies. In addition, exchanging such copies requires neither additional effort nor additional cost, so that a parallel second-hand market would be likely to affect the interests of the copyright holders in obtaining appropriate reward for their*

65 *Nederlands Uitgeversverbond, Groep Algemene Uitgevers v. Tom Kabinet Internet BV, Tom Kabinet Holding BV, Tom Kabinet Uitgeverij BV*, <https://curia.europa.eu/juris/document/document.jsf?text=&docid=221807&pageIndex=0&doclang=EN&mode=req&dir=&occ=first&part=1> (accessed on November 15, 2022)

66 <https://eur-lex.europa.eu/eli/dir/2019/790/oj> (accessed on November 15, 2022)

works much more than the market for second-hand tangible objects, contrary to the objective referred to in paragraph 48 of the present judgment.”

One might think that the discussion about digital exhaustion is obsolete, with the growing popularity of streaming services. However, it has to be noted that ISPs offering digital content downloads are still very successful, even in the streaming era. For example, Amazon has been selling more e-books than paper books ever since 2010 (Tweeny, 2010). When it comes to music, the number of music downloads is dropping, but there are still a lot of people who want to “own” a digital copy of their favourite music (in 2021 in the U.S. alone, there were 209.3 million digital music singles downloads. In the EU not as much, but still a considerable amount⁶⁷.) Also, many people like to purchase movies and/or series and watch them at their own convenience. The same applies to games. Some reasons for download are probably connected to its benefits over streaming: once downloaded, a file can be accessed and used over and over again, regardless of the fact that it might no longer be available on streaming services or via download.⁶⁸ Also, a person does not have to be online to access and use downloaded content, which can be extremely important due to the cost of streaming or instances when a person cannot be connected to the internet (e.g., on a plane).

If a person wants to pay for digital content to have it on his/her device, rather than stream it, it certainly forms a stronger bond with the object of that purchase (Schjønby-Nolet, 2019). Even more likely, the bond may have already existed before download and was the reason for it. Whatever the case, it can be assumed that a person who purchased such content would, one day, want to donate it, bequeath it or re-sell it if he/she has lost interest in it. Since in the future it is probable that most of us will transfer to digital forms of many copyrighted works (if we have not already), and

⁶⁷ <https://www.statista.com/statistics/186688/downloads-of-digital-music-singles-in-the-us-since-2004/> and <https://www.statista.com/outlook/dmo/digital-media/digital-music/music-downloads/europe#revenue> (accessed on November 15, 2022)

⁶⁸ For example, lately, Netflix has been severely criticized by the public for removing some of the most favourite shows and movies. Subscribers went so far as to threaten to cancel their subscription because their favourite show was cancelled in the middle of them watching it.

Hein, M., Dawson’s Creek’ Leaves Netflix, and Fans Are Very Upset, <https://popculture.com/streaming/news/dawsons-creek-leaves-netflix-and-fans-are-very-upset/#1> (accessed on November, 2022)

many will want to download it and later transfer it, the authors believe that exhaustion of digital content will come more and more into focus.

Independent of benefits for users and their families, digital exhaustion has many other benefits: it makes access to works easier by lowering prices and increasing availability; it helps preserve old, abandoned and censored works; it also protects consumer privacy in the acquisition, enjoyment, and transfer of works; it supports innovation and competition between ISPs (Perzanowski and Schultz, 2014). It is connected to the realization of freedom of movement in the EU; it also enhances marketability of copyrighted works by making them more available and affordable through second-hand markets and it establishes access and preservation of works that are not available any more through other channels (Karapapa, 2018).

Many authors who argue in favour of digital exhaustion mention possible solutions on how not to infringe copyright while transferring digital content. The most important issue for this to happen is to make sure that digital content being transferred is removed from sellers' hardware after the transfer is made. An issue of marking each copy of the digital work so that each copy can be identified, as well as limiting the number of times one digital content can be retransmitted, was also raised (Crosby, 2015, Merzei, 2015). Most agree that the technology to do so exists and could be applied to digital content in this regard (Karapapa, 2018; Oprysk, Matulevičius and Kelli, 2017; Perzanowski and Schultz, 2011; Schjønby-Nolet, 2019).

The authors of this paper will not try to suggest ways in which technology can ensure a secondhand market for digital content, nor are they capable of offering a solution in terms of ways in which copyright infringement problems could be solved using this technology, since that would be beyond the scope of their expertise. They would, however, like to stress that the problem of transfer of purchased digital content is not going anywhere any time soon. Therefore, regardless of streaming being the predominant format of using digital content, finding ways to transfer downloaded digital content, while reconciling opposing interests of users (purchasers) and the public with interests of copyright owners, should be one of the future goals for legislators (Mezei, 2015).

Consent to surprising clauses in ToS

ToS are composed of a large number of clauses, so users often do not notice the ones that might be questionable and, even if they do, they agree to them because they cannot influence them (Kim, 2011). Most ToS consist of the following clauses: an intellectual property clause (informs users that the website data is protected under copyright law); a prohibited use clause (outlines prohibited actions); a modification clause (allows the website to modify ToS unilaterally); a termination clause (lists the conditions under which the web site can deactivate the user's account); a limitation of liability clause (stipulates the degree of legal exposure for the website in actions arising from website usage), a disclaimer clause (states that the web site services are provided to the users without warranties); a class action waiver clause (the user will not file a class action lawsuit against the website); an arbitration clause (which mandates arbitration of disputes concerning the user's rights and duties); a forum-selection clause (establishes the geographic location for litigation between the parties); a governing law clause (specifies which law will govern a dispute between the parties); a time bar clause (sets a time period within which the user is entitled to file any lawsuit against the website) (Benoliel and Becher, 2019, 2266).

Some clauses are there to shield ISPs from possible problems, e.g., from liability (clauses limiting warranty or stating that there is no warranty at all) or to put limitations on the use of the product (license instead of transferring ownership) (Kim, 2011). Other clauses are used to limit or terminate users' rights (e.g., clauses determining exclusive jurisdiction or an arbitration clause) in order to minimize risks for ISPs by cutting down costs and unpredictability (Kim, 2011).

However, many of them are not expected by users, given the nature of the transaction that they wanted to achieve on ISPs' websites. Some of those clauses might even favor ISPs at the expense of users, e.g., clauses giving ISPs the license to user content that is much broader than is necessary, giving ISPs intellectual property rights, etc. (Kim, 2011). Clauses that are certainly unexpected to average users are those banning public criticism of the product, requiring assent to third-party monitoring, forbidding reverse engineering and use in connection with third-party software, disclaimers of liability, requesting assent to all future changes to the terms, etc. (Davis, 2007). Also, concerning different clauses they consist of, many ToS

might be considered non-transparent when it comes to form, substance, behavior towards certain users, inconsistency between what is promised to users and what actually applies to them and also concerning outcomes of contractual disputes (Becher and Benoliel, 2021).

When it comes to contractual disputes, one of the clauses that often leads to them is the arbitration clause (García, 2013; Kunz et al., 2003). Users usually do not expect that, by agreeing to ToS in order to acquire certain goods or services, they have also agreed to an arbitration clause (Kim, 2020-2021). Therefore, users do not know anything about the arbitration court they have agreed to, which puts them at a disadvantage (Triva, 1970).

There are a few examples in Croatian case law of courts dealing with adhesion contracts' clauses that were surprising to the party consenting to the contract. These contracts were not drafted online, but regardless, it is interesting to see which position Croatian courts took. Admittedly, these clauses, while surprising, were also, according to the courts, unfair. The clauses in question determined the jurisdiction of the court of the drafter's place of residence. In one case, the jurisdiction of the Klagenfurt court was even contracted, which, if applied, would have led to a significant financial imbalance between contracting parties. Therefore, courts decided that these clauses were null and void.⁶⁹ The reason behind this decision was that the weaker party had no influence over them and it led to a significant imbalance between contracting parties (this is also determined by Croatian Obligations Act (OA), Art. 296 and Consumer Protection Act (CPA), Art. 53, concerning consumer contracts).

In CPA, Art. 54, there is a list of clauses that can be considered to be unfair in consumer contracts. Among them, there are some that are often found in ToS (arbitration clause, clauses limiting certain consumer rights and obligations of the drafter of the contract, etc.). Also, Art 61 of CPA determines that ISPs must inform consumers in a clear and comprehensible manner about various important information concerning online transactions. This obligation of ISPs is not considered fulfilled if the information is only displayed to the consumer in ToS. Unfortunately, no

69 GŽ 1621/2016-1 (<https://www.iusinfo.hr/sudska-praksa/ZSRH2016StGzB1621A1> (accessed on November 15, 2022); Gž 492/2018-2 (<https://www.iusinfo.hr/sudska-praksa/ZSRH2018VuGzB492A2> (accessed on November 15, 2022), Gž 141/2020-2 (<https://www.iusinfo.hr/sudska-praksa/>(accessed on November 15, 2022).

examples were found in Croatian legislation or case law concerning clauses that were only considered surprising and ambiguous, without them also being unfair. However, those unexpected clauses could pose problems for users and should be addressed. Provisions of CPA Arts. 54 and 61 could be indicative of how unexpected clauses could be dealt with.

This problem is obviously not insignificant, because it has already been recognized by some countries. There are examples of provisions or case law, concerning clauses such as these, both in civil and common law countries. For example, German Civil Code (Bürgerliches Gesetzbuch), like Croatian OA (Art. 296), has a provision dealing with clauses in adhesion contracts that are contrary to good faith and disturb the balance between the contracting parties and are therefore void (BGB, Art. 307). However, BGB takes a step further and, in Art. 305c, determines that clauses which are surprising (*überraschende*) and ambiguous (*mehrdeutige*), so the other party has no reason to expect them in the contract, will also not be considered a part of the contract. Something similar was found in U.K. case law, where the judge has, in *Thornton v. Shoe Lane Parking Ltd.*, decided that the drafter is expected to inform consumers of the clauses that are of special interest to them, especially the clauses that are unusual and unexpected for the contract that is being concluded (in addition to clauses that impose unusual obligations, that is, deprive consumer of the rights he/she otherwise has by law).⁷⁰ Some US courts also took a similar stand (e.g., *Colgate v. JUUL Labs, Inc.*, *Theodore v. Uber Technologies, Inc.*), where judges concluded that unexpected terms found in ToS, given the nature of the transaction, should require specific notice.⁷¹

In *Colgate v. JUUL Labs, Inc.* the judge decided “...an offeree, regardless of apparent manifestation of his consent, is not bound by inconspicuous contractual provisions of which he was unaware, contained in a document whose contractual nature is not obvious.” and in *Theodore v. Uber Technologies, Inc.* the judge decided that: “Accordingly, Uber has not met its burden to justify compelling arbitration, and (...) I must deny its motion seeking that relief

70 *Thornton v. Shoe Lane Parking Ltd*, Court of Appeal, <https://www.bailii.org/ew/cases/EWCA/Civ/1970/2.html> (accessed on November 5, 2022)

71 *Colgate v. JUUL Labs, Inc.*, <https://casetext.com/case/colgate-v-juul-labs-inc-1> (accessed on November 5, 2022), *Theodore v. Uber Technologies, Inc.*, <https://casetext.com/case/theodore-v-uber-techs> (accessed on November 10, 2022)

because parties may not be compelled to arbitrate when they have not agreed to do so.”

The authors suggest that Croatian legislators also need to acknowledge that drafters of adhesion contracts, made both online and offline, put clauses that consumers do not expect in their adhesion contracts, which can lead to serious problems for consumers. They should not be allowed to do that without at least drawing consumers’ attention to those clauses and making them specifically consent to them. If they did not do that, the solution would be to not consider those clauses to be a part of the contract.

Conclusion

The problem of what will happen to digital accounts and their content after the death of their user could easily be solved by ISPs themselves. Some of them (Facebook and Google) have already given users the opportunity to choose, while they are still alive, what will happen to their accounts *postmortem*. In the future, ISPs could request users to make that choice during account setup. That could be one of the necessary steps while opening an account (like writing user’s name, DOB, choosing their password etc.) That way, all users would choose, right away, what will happen to their accounts after they die. This would be in the users’ interest, but in the interest of ISPs, as well, because they would avoid possible problems that occur when users’ heirs sue in attempt to access deceased’s accounts and their content (as was the case on several occasions). This would also be beneficial in one more respect: it would draw the attention of the users and consequently the public to this problem and in time it would become normal for users and ISPs to address and resolve this issue.

The authors believe that the problem of transferring digital content purchased from an ISP cannot be solved as simply. To allow transfer of digital content purchased from an ISP, the concept of the exhaustion doctrine would have to be extended to all purchased digital content (not only to software). However, this can be quite inconvenient for copyright owners, given that digital goods (e.g., e-books) do not deteriorate with time and use, so used copies would be in the same condition as the new ones, but much cheaper. This would drive the price of that content down, which is obviously not in the best interest of copyright owners. By using technology

that is already available, some of these issues could be solved or at least, alleviated (e.g., marking each copy of the digital work so that each copy can be identified; ensuring that the file of the person transferring it is deleted from his/her device; limiting the number of times digital content can be transferred). The authors believe that, by using technology, it would even be possible to deteriorate content a little bit, after each transfer, thus making it similar to deterioration of its tangible counterpart with each use. By using technology, it would likely be possible to apply digital exhaustion to most, if not all digital content, in order to reconcile opposing interests of users and copyright owners, since nonexistence of digital exhaustion may now be in accordance with copyright law, but the authors are not sure that this necessarily coincides with the needs of modern life.

As for surprising and unexpected clauses that can be found in many ToS' (but also in all other adhesion contracts), authors suggest that such clauses should not be considered a part of ToS (like it is regulated in Art. 305c of Bürgerliches Gesetzbuch), unless users explicitly agree to clauses like that. Namely, consent to ToS should not automatically mean the consent to the clauses that the average user does not expect. These should be agreed upon specifically or they should not have effect.

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MOĆ PRUŽATELJA INTERNETSKIH USLUGA (ISPS) NAD DIGITALNIM ŽIVOTOM – UVID U GRAĐANSKO PRAVO***

Sažetak

U ovom se radu pitanje moći pružatelja internetskih usluga (ISP), nad našim digitalnim životom, analizira na sljedećim primjerima: nasljeđivanje digitalne dobara, prava koje korisnici imaju nad digitalnim sadržajem te nemogućnost da taj sadržaj prenose dalje i pristanak na neočekivane klauzule koje se nalaze u uvjetima poslovanja ISP (ToS). Ovim radom želimo skrenuti pozornost na pravila koja većina ljudi svakodnevno prihvaća, a da ih uopće ne primjećuje niti zna kakve su posljedice njihova prihvaćanja.

1) U kontekstu nasljeđivanja, nakon smrti korisnika ISP-ovi u pravilu neće dopustiti nasljednicima pristup ostaviteljevoj digitalnim dobrima i digitalnim računima, čak i ako je korisnik u oporuci tako izjavio. To može predstavljati probleme, kako za nasljednike, jer mnoga od tih dobara imaju stvarnu novčanu i emocionalnu vrijednost, tako i za ISP-ove, jer su se mnogi od njih suočili s tužbama nasljednika koji žele pristup računima preminulog.

2) Pitanje prava korisnika nad digitalnim sadržajem polemizira one situacije u kojima osoba nakon kupnje određenog digitalnog sadržaja ne postaje njegov vlasnik, već stječe samo pravo uporabe, sve do smrti. Stoga on taj sadržaj ne može prenijeti ni na koga, kako za života, tako ni nakon smrti. Ako bi on to i učinio, to bi u slučaju većine digitalnog sadržaja, kršilo autorska prava.

3) Što se tiče pristanka, korisnici često prihvaćaju razne klauzule koje ISP-ovi stavljaju u svoje ToS, od kojih se za neke ne očekuje da budu njihov dio. Neki od njih nemaju nikakve ili malo veze s onim što su korisnici željeli postići na web stranicama ISP-a. U žurbi da koristi usluge ISP-a, osoba može prihvatiti mnoge uvjete koje možda ne bi prihvatiti u fizičkom svijetu, što zauzvrat može dovesti do sudskog postupka nakon što korisnik postane svjestan na što je pristao.

Autori metodološki obrađuju navedenu problematiku analitičkom, kompilacijskom i metodom slučaja, nastojeći doći do valjanih (građansko)pravnih zaključaka. S tim u vezi, osnovni problemi rada bit će obrađeni analitički, korištenjem važeće domaće i strane građanskopravne literature. Navedeni zaključci potkrijepljeni su konkretnim primjerima koji se pojavljuju u (IT) praksi.

Ključne riječi: digitalna dobra, nasljeđivanje digitalnih dobara, pružatelji internetskih usluga – ISP, upotreba digitalnih dobara, uvjeti poslovanja (ToS)

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MANUFACTURING OF CONSENT IN THE HYPER-INFORMATION AGE

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Abstract

Almost 35 years since the publication of Herman and Chomsky's *Manufacturing Consent*, the world has undergone significant transformations. For the authors, power appears in an interaction between the (media) corporate and state-political structures, which maintain the status quo, promote desired changes, or limit the undesirable aspirations in the public sphere. Power no longer has a unique possessor in the form of a state-political repressive apparatus. Rather, results from the interaction of multiple forces, while truth is a thing of this world, produced by means of multiple forms of limitation, as Foucault wrote in "Power/Knowledge". Manufacturing of consent is attributed to the mass media and the propaganda model within which media create a partial picture of open issues, prevent the availability of alternative approaches, and select materials for publication in accordance with the dominant political structure. Such a model of power functions under the condition of control over mass media and publishing in general. This paper contributes to the understanding of changes caused by the technical and digital shift that has (potentially) enabled each individual to become a publisher and directly participate in shaping the public sphere. With the flood of publishing on social networks and portals, the issue of control over published content and availability of alternative approaches has turned into its opposite. The problem is no longer how to break the media-corporate blockade, but how to block the entry of "alternative facts", fake news and obscene attitudes into public sphere via algorithm. The review of the relevant literature, research results from secondary sources, and quantitative indicators of modern electronic media usage reveal the extent of the transformation of modern society. Results show that, with information coming to the fore, meaning slips into the background, and the intrusion of the private into public space results in gradual dissolution of both private and public spheres.

Keywords: hyper-information, media environment, manufacturing consent, power, propaganda;

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Introduction

Citation styles for *Manufacturing Consent: The Political Economy of the Mass Media* offer an elementary and yet crucial insight. They all contain different forms of the same essential information: author(s), year of publication, book title, place of publication and publisher. For example, the APA style (6th ed.) used here states: “Herman, E. S., & Chomsky, N. (1988). *Manufacturing Consent: The Political Economy of the Mass Media*. New York: Pantheon Books”. The date and place of publication is the crucial information our research will focus on, due to the fact that time and space frame the crucial elements of the book in a specific spatio-temporal manner. In 1988, floppy disk is *the* medium, the Netherlands is the first European country to get access to the internet,⁷³ and the relations between the USA and the Soviet Union are intensifying and relaxing. The world is entering a phase of intense communication, and authoritarian practices of governments seem to be coming to an end⁷⁴, pressured by growing, technically supported transparency and an unprecedented level of access to information. This is a radically simplified view of the world in 1988, from the Western, liberal-democratic perspective. Within this world, politics as a struggle for power is happening in ways that elude the clear understanding and the presupposed transparency of government.

The book *Manufacturing Consent: The Political Economy of the Mass Media* offers one possible take on the issue of power in the USA’s democracy in 1988. Narrowing the research scope to the democratic type of political organization is crucial due to the fact that: “It is much more difficult to see a propaganda system at work where the media are private and formal censorship is absent” (Herman & Chomsky, 1988, 1). Dictatorships and authoritarian forms of government ensure public support by using all available elements of force. Democratic societies, on the other hand, need

73 <https://www.uts.edu.au/news/campus-community/18-things-happened-1988>; retrieved 21.11.2022.

74 Such presupposed triumph of Western liberal democracy impelled political scientist Francis Fukuyama to conclude in 1989 that we have reached the moment of: “not just (...) the passing of a particular period of post-war history, but the end of history as such: That is, the end-point of mankind’s ideological evolution and the universalization of Western liberal democracy as the final form of human government”. If such a naïve conclusion can be attributed to overzealous infatuation with the apparent end of bipolar political organization, the same conclusion repeated by Fukuyama in October 2022 in *The Atlantic* deserves a more detailed explanation.

to obtain or gain public support in less forceful, but equally efficient ways. The process of gaining public support is hard to notice and especially difficult to understand because “the media actively compete, periodically attack and expose corporate and governmental malfeasance, and aggressively portray themselves as spokesmen for free speech and the general community interest” (Herman & Chomsky, 1988, 2).

In an ideal understanding of democratic societies and their fundamental conditions, mass media act as a kind of an unbiased mediator that mirrors the social realities and public opinion, deals with public issues, clearly and objectively elaborates state policies, crucial events and standings to the electorate, and makes sure that state, public or private structures do not act contrary to law and public interests. The crucial principles of democracy are conditioned by the notion of a rational and reasonably informed electorate, so:

“Leaders of the media claim that their news choices rest on unbiased professional and objective criteria, and they have support for the contention within the intellectual community. If, however, the powerful are able to fix the premises of discourse, to decide what the general populace is allowed, to see, hear, and think about, and to “manage” public opinion by regular propaganda campaigns, the standard view of how the system works is at serious odds with reality” (Herman & Chomsky, 1988, 2)

On the level of epistemology, Herman and Chomsky are following a typical rationalist and logicist assumption and apriorism, by which informing people or introducing them to facts and true information necessarily results in rational and logical decisions.⁷⁵ Their theoretical framing is deeply rooted in critical theory and Marxist critique of capitalism. According to Marx’s basic assumption in *Critique of the Gotha Programme* (1999), “The capitalist mode of production, for example, rests on the fact that the material conditions of production are in the hands of nonworkers in the form of property in capital and land, while the masses are only owners of the personal condition of production, of labor power.” What we see in

⁷⁵ It comes as no surprise that the short note on *rationalism* in Croatian Encyclopaedia (Hrvatska enciklopedija, 2021) ends with the mention of Noam Chomsky. Although widely disputed, the idea that the mind contains *a priori* categories, which precede experience and determine the structure of language and the way of thinking was preserved in his works.

Manufacturing Consent is an application of Marxist critique to a new form of capitalist (information-based) economy.

Economy of the industrial age was (and still is) rooted in factories and machines as means of mass, serial production. Taking into consideration the technological basis as a decisive factor for economy, politics and social organization, Marx understandably points his critique towards the owners of the means of production that are characteristic of the time and space, as well as towards the instrumentalization of work which, as a consequence of specific technological basis, became a mere means to an (capitalist) end. Herman and Chomsky follow the same logic, adjusting it to the space and time of a new economy. In the age characterised by information as a central economic and social value, as well as digital technology as a new technological paradigm, critique must focus on information and communication (mass media) technology as means of production of the central economic value, and the owners of the technology in question. The powerful no longer manage the relations of power by owning the machines and factories, which are mostly outsourced from developing countries with cheap labor. Respectful of the new, information based, digital economy, they do it by fixing the premises of discourse and deciding what the general populace is allowed to see, hear, and think, according to Herman and Chomsky. Their proposed propaganda model is therefore an old model adopted for a new technological, information, communication and media dominated social, economic and political environment. The outsourced⁷⁶ machines and factories are simply replaced by media corporations as a new co-locus of power: in an information-based economy, information is power and those who produce, collect, distribute and control the information are the powerful.

It is clear that control over the means of production and distribution of information is a prerequisite for the propaganda model. If the powerful have the ability to control the information and facts that enter the public sphere, they produce, control, influence and manage the *truth* of public opinion. As Foucault had put it, power no longer has a unique possessor in the form of a state-political repressive apparatus, but results from

⁷⁶ In a sense in which space and time are intrinsically influenced by technology (McLuhan, 2014; Stiegler, 1998, 2008, 2010), it can be argued that industrial, factory-based mass production does not construct the same space and time as information-based, digital, hi-tech production. Real-time of the computational technicity further masked the spatial and temporal discrepancies.

the interaction of multiple forces, while “truth is a thing of this world: it is produced only by virtue of multiple forms of constraint”⁷⁷ (Foucault, 1980, 131). The main problem of developed, information-oriented western societies in 1988 is therefore the production, availability and control of information. Following this logic, it is not surprising that, for Herman and Chomsky, mass media became the new stage of the power struggle between the (information) moguls and paupers. After all, rational and logical members of the public only need to be reasonably informed, and the world will become a union of free people, as proposed by Hegel, who regards history as an intelligible process moving towards the realization of human freedom (Hegel, 1975) and as misinterpreted not once, but twice by Fukuyama (1989, 2022).

As the means of production, distribution and control of information in democratic societies, the media do not need to be coerced into cooperation with the ideological state apparatus and corporate power structures. They are an integral part of the system, crucial for its functioning, as stated by Miliband in *Politics and Legitimation* (2013). For Herman and Chomsky, power in liberal democracies resides in an interaction between the (media) corporate and state-political structures, which maintain status quo, propagate desired changes, or limit undesirable aspirations in the public sphere. Blurring the distinction between private and public spheres of influence, the authors state that:

“A propaganda model focuses on this inequality of wealth and power and its multilevel effects on mass-media interests and choices. It traces the routes by which money and power are able to filter out the news fit to print, marginalize dissent, and allow the government and dominant private interests to get their messages across to the public” (Herman & Chomsky, 1988, 5).

Manufacturing of consent is attributed to the mass media and the propaganda model within which media control the information and facts, create a partial picture of open issues, prevent the availability of alternative approaches, and select materials for publication in accordance with the dominant political structure.

77 Chomsky was, of course, well aware of Foucault’s work, and his 1971 debate with Foucault clearly shows the similarities and discrepancies between the two. For Croatian translation, see: *Razgovor: Chomsky – Foucault*; Tvrđa, 2004, 1/2, p. 135-172. Reviewed and translated by Višeslav Kirinić.

This is the baseline of the understanding of Power in Western, democratic societies presented in the book. The understanding is far from original, as it follows a well elaborated theoretical framework extending from Marx to the Frankfurt school and critical theory, and further on to more contemporary critiques. The derivative nature of the propaganda model is even more obvious when compared to Walter Lippmann's works, especially his book *The Public Opinion*, which explicitly discusses *manufacturing* and *creation of consent* (Lippmann, 1997, 248). Turning the attention to the time and place of publication, we see that the book was published in 1922 by New York, Harcourt, Brace and Company, or 66 years before Herman and Chomsky reused Lippmann's phrase. Further analysis shows that the reuse or recycling does not end on the level of term *manufacture of consent*. In *The Public Opinion*, Lippmann addresses the issues of the inability of journalists to understand the news and transfer it correctly, the role of the media in presenting information, the nature of public opinion in a democracy and its influence on public issues, as well as the paradoxes of majority rule (Lippmann, 1997). These issues remained at the centre of his attention during 60 years of his career. As emphasized in the introduction to the 1997 edition of *Public Opinion* by Michael Curtis, in 1959 Lippmann was still wondering how the public should know which of the facts about a certain issue are important and relevant, and repeated the conclusion that it requires a specialized inquiry by trained minds. Sharing his thoughts with Columbia University students in 1969, he said that modern reporters, even though more sophisticated and educated than in 1922, were still not prepared for the complex and chaotic reality which they reported about. In a 1919 letter to Ellery Sedgwick, he wrote that "freedom of thought and speech presents itself in a new light and raises new problems because of the discovery that opinion can be manufactured" (Blum, 1985).

At the beginning of the 20th century, there was no doubt that *truth* and the news presented by the press were not synonymous. Lippmann's remarks came as a result of direct experience. Although criticizing it later, he had worked with the CREEL Committee (Funk, 1994), which tried to influence the public opinion by censoring anti-war information and producing all sorts of pro-war materials (magazines, pamphlets, movies and cartoons), and to finally manufacture the consent for the entry of USA into WW in 1917. In a 1919 letter to Oliver Wendell Holmeson, he said

he was “deeply troubled” (Blum, 1985) by his work on public opinion and theories of popular government.

Thanks to direct insight, he regarded the press, propaganda, and censorship as limiting the access to truth. In *Liberty and the News* (2020), he criticized newspaper owners as mostly self-proclaimed defenders of the truth, who are interested in the news not so much for the reason of objective presentation to the public as for financial or ideological reasons. News reporters and journalists are also criticized because their stories are inaccurate and unreliable, as a result of their inability to understand the complex reality. On the lines of rationalist argumentation, he saw the solution in disinterested, unbiased and dispassionate reporting, which will allow the Americans to live deliberately, to be well-informed, and to substitute stereotypes and tradition with purpose.

“We can no longer treat life as something that has trickled down to us. We have to deal with it deliberately, devise its social organization, alter its tools, formulate its method, educate and control it. In endless ways we put intention where custom has reigned. We break up routines, make decisions, choose our ends, select means....” (Lippmann, 1985).

Governed by majority consent, democratic systems are based on decisions of an electorate. “When the manufacture of consent is an unregulated private enterprise” (Lippmann, 2020), the consent being manufactured is endangered by particular, private interests. Lippmann felt that the solution was in better trained journalists and the creation of an independent research organization that would provide accurate, unbiased information. Since (a) ordinary citizens can no longer rationally perceive layered political problems, because the mass media, due to their speed and conciseness, produce slogans instead of interpreting events, and (b) people do not rationally perceive the realities around them and they are not reasonably informed, it is (c) the duty of intellectuals to help them reach rational conclusions on important issues by manufacturing consent. The idea is simultaneously inspiring and haunting, which Lippmann clearly states.

It is clear that Lippmann addressed all of the issues and elements of propaganda model 66 years before Herman and Chomsky reused it, and it is clear that the propaganda model presented in the *Manufacturing Consent* is as original as its Marxist and Frankfurt School inspired theoretical

framework. Herman and Chomsky appropriate and utilise Lippmann's model of propaganda, but at the same time they unfortunately exclude his theoretical frame in favour of the Marxist agenda. This is unfortunate, because Lippmann's theoretical frame seems far more useful and far less ideologically constrained.

Lippmann claimed that “the world that we have to deal with politically is out of reach, out of sight and out of mind because it has to be explored, reported and imagined by others” (Lippmann, 1998, 29). Public opinion is the result of the pictures inside the heads of these others being acted upon by groups of people, or individuals acting in the name of groups. This is, however, just the first, elementary level of limitation in our access to essentially second-hand facts, the truth and freedom that (rationally necessarily) follows, resulting from the representative nature of a mediated political and social reality. It is also a benign limitation because it seems to have an easy solution, proposed by Marx and followed eagerly by rationalist leftist theorists, including Chomsky. If the power is in the hands of those controlling the means of production, all that needs to be done is the (re)appropriation of those means as the source of inequality, class differentiation, pauperisation and modern-day (industrial) slavery. The results of such attempts are well known: simply put, whoever takes control of the means of production immediately (meaning: without mediator or directly!) appropriates power by becoming the controller of means of production and the Marxist (as well as common-sense) power equation proves to be true, even at the cost of Marxist, anti-capitalist programme.

Unlike Herman and Chomsky, Lippmann has a far less naïve approach. Crucial factors which limit our access to the facts, even before any attempt had been made to manipulate them, have to do with inherent and almost a priori weak spots of human cognitive functions⁷⁸: (a) artificial censorships, (b) limitations of social contact, (c) comparatively meagre time available in each day for paying attention to public affairs, (d) distortion arising

78 Behavioural economics explained human decision-making process in real-life situations. Generally put, it seems that decisions are mostly based on biases, stereotypes and other non-rational generalisations. The universality of human tendency towards self-confirmation is one of the reasons why behavioural economist Daniel Kahnemann won his Nobel Prize in economic sciences in 2002. Challenging and countering several basic assumptions of traditional economic theory and, among others, the (Chomskyan, inherently rationalist) presupposition that people make rational choices based on their self-interest, Kahnemann (and Tversky) showed that people often fail to fully analyse situations where complex judgments are required.

because events have to be compressed into very short messages, (e) the difficulty of express a complicated world with limited vocabulary, and (f) the fear of facing those facts that would seem to threaten the established routine of our lives (Cultural Apparatus, 1999). The idea that the problem of power, truth or freedom lies in the hands of external agents is secondary to the problem of individual, personal ability to understand the reality and act deliberately and rationally. In other words, the idea that the problem of power in mass media, information-based society can be reduced to the ownership of media and advertising campaigns (propaganda) is a serious simplification, typical of rationalist, abstract, model-oriented approaches, such as Herman and Chomsky's. Taking into consideration the allure of rationalist and ideological simplifications, Lippmann addressed the issue in 1914:

“The sense of conspiracy and secret scheming which transpire is almost uncanny. “Big Business,” and its ruthless tentacles, have become the material for the feverish fantasy of illiterate thousands thrown out of kilter by the rack and strain of modern life. It is possible to work yourself into a state where the world seems a conspiracy and your daily gong is beset with an alert and tingling sense of labyrinthine evil. Everything askew—all the frictions of life are readily ascribed to a deliberate evil intelligence, and men like Morgan and Rockefeller take on attributes of omnipotence, that ten minutes of cold sanity would reduce to a barbarous myth...” (Lippmann, 1985).

One sane look at classical representations of Herman and Chomsky's propaganda model, such as Pierangelo Pirak's animation (2017), which Chomsky found “brilliantly done” (The Listening Post, 2018), reveals the mythical tentacles, evil intelligence and omnipotent conglomerate of the state apparatus and media corporate powerhouses announced as simplifications by Lippmann in 1914. To be clear, Lippmann was “deeply troubled” by the possibilities of manufacturing or creation of consent as mentioned above, but his primary concern were the cognitive limitations of media owners, journalists and individual consumers of the media. His problem were the biased and stereotypical ill or uninformed. Herman and Chomsky's problem were essentially perfectly rational, but disinformed. Obviously aware of the abovementioned paradox of power, Lippmann resisted the temptation of rationalist simplification and the naïve idea that

the (re)appropriation of (media) means of production (of information) will solve the problem of cognitive limitations. Unfortunately, Herman and Chomsky did not.

Equally unfortunately, Herman and Chomsky published *Manufacturing Consent* in 1988, at the turning point of technological paradigm. An economist (Herman) and a linguist and activist (Chomsky) for the obvious reasons failed to take into consideration the technical aspect of the media. As naively as with ideological framework, they could not help but follow the sociological, institutional and organizational meaning as the crucial element of the media, disregarding completely the physiological, physical and technical aspect (Biti, 2000). Lippmann did not. Explaining the un-information, among other things, by the technical limitation or compression of messages and vocabulary to make them fit (or simple enough) for the technically limited media, he showed a clear understanding of the complex nature of the media, sowing the seeds for McLuhan's provocative and inspiring conclusion that "medium is the message" (McLuhan, 2014, 7). However, Herman and Chomsky's disregard for the technical (media) paradigm did not come as a result of ignorance of media theory or an unfortunate time and place of publication. The disregard is the result of self-confirmation bias, to borrow a term from behavioural economy.⁷⁹ Disregard for the crucial elements of media (political, economic, social) environment stems from the need to confirm the validity of the proposed propaganda model, as well as the basic theoretic (Marxist, critical theory) assumptions built into the model. Due to his fundamentally rationalist standing, Chomsky sees failures of judgement as a result of external manipulation and disinformation of the otherwise rational, logical citizens. Due to his Marxist theoretical motivation, he sees the solution to the issue of power in the (re)appropriation of (media) means of production (of information), controlled by the power elites. For that matter, the manufacturing of consent in Herman and Chomsky's book has less to do with

79 Instead of basing their conclusions on analysis, people often make decisions using rules of thumb and ground their decisions on factors such as fairness, past experiences and aversion to losing, which economists traditionally do not take into consideration. Biases such as anchoring, availability heuristic, bandwagon effect or self-confirmation bias which Chomsky describes while reducing the influence of the internet on propaganda model to bubble argumentation are equally present in everyone's (even Chomsky's) decision-making processes, regardless of the medium being used. If malevolently used as inherent and unavoidable flaws in the human decision-making design, biases can be amplified and exploited as vessels for all kinds of ideological and corporative apparatuses, which undoubtedly calls for further investigation.

media than with confirming the a priori Marxist, anti-capitalist model of power. In any other case, Herman and Chomsky would take into consideration the revolutionary break in normal technology (communication, science, economy, politics) and a paradigm switch deserving of Kuhn's theoretical framework (Kuhn, 1970).

Technological tipping point

When it comes to time and place of publication as the two categories crucial for the research, it's quite clear that *Manufacturing Consent* was published in a challenging time for classical, rationalist concepts in the field of media and communications. Mirroring and possibly enabling the disintegration of one form of political framework that governed the world since WWII, media as a technological framework was shedding its analogue skin in favour of digitally, binary coded resetting, supported by information and communication technology, but the consequences of this paradigm shift were still incomprehensible.⁸⁰ In 1989, just a year after the publication of *Manufacturing Consent*, the World Wide Web was established, and the information and communication paradigm was revolutionized, bringing about essential differences in creating, collecting, organizing, interpreting, storing, searching, spreading, transforming and using information and knowledge.

Classical gatekeeping, the propaganda model elaborated by Herman and Chomsky (1988, 1 – 35), covers a typical analogue, publisher-controlled media environment, claiming that the “raw material of news” gets processed by a series of five interrelated filter constraints (Klaehn, 2002, 17 (2)), “leaving only the cleansed residue fit to print”.

Gatekeeping model is classic in the sense that it refers to Lippmann's 66-year-old insights, predating the digital, ICT media ecology of the 1990s, without taking into consideration the influence of www, which brought about the contemporary digital, hyper-information media framework. For that matter, just one year made a critical difference in

80 It could be claimed that the disintegration and reshaping of the political framework resulted from the substantial change in (media) technology. In his 1962 work, *The Gutenberg Galaxy: The Making of Typographic Man*, McLuhan elaborates on that exact idea. For more contemporary discussions on the topic, see Bernard Stiegler.

understanding the media. As the year when *Manufacturing Consent* was published, 1988 proved to be the end of a (political, economic, technological and social) era, and the *publication* of World Wide Web in 1989 made the book obsolete before it even entered the serious scientific and popular circulation. The fact that the main concepts of the book and propaganda model were elaborated 66 years earlier by Walter Lippmann did not help.

In an interview held on March 13th, 2018 and published under the title *Still manufacturing consent*, Alan MacLeod discussed with Chomsky the relevance of propaganda model in the age of Google, Facebook, Instagram and Twitter. Defining the internet and the social media as the biggest difference between the time of publication of *Manufacturing Consent* and the present, MacLeod pointed out several important quantitative indicators, relating to media environment in 2016 (MacLeod, 2019).

After hearing the statistics, Chomsky's comment was very clear:

“I don't think the Internet and social media changes the propaganda model at all. The propaganda model was about the major media institutions and they remain, with all the social media and everything else, the primary source of news, information and commentary” (Macleod, 2019).

Since most of the news on social media and digital platforms comes from major media, Chomsky sees no change in the news media landscape, and the propaganda model remains equally relevant and valid. “If you look at the news on Facebook, it comes straight from the major media. They don't do their own investigations”. In fact, he continues, “Ed and I did a second edition of *Manufacturing Consent* about 16 years ago (2002) and we talked about the Internet and whether to write anything about it and we decided just to leave it alone”. Taking into consideration the characteristics of a new, hyper-information media environment and the complete disregard of its characteristics by Herman and Chomsky, it seems fair to say that if the theoretical outdatedness did not bury the book, the revolutionary technological paradigm shift undoubtedly did.

Hyper-information media environment

The disregard for the Internet and social networks as potential challengers of propaganda model is an over-simplification by Herman and Chomsky, which points to the need to confirm the validity of the propaganda model and its theoretical foundations. If nothing else, it does not take into consideration the interactivity of internet as a medium, the opened feedback loop and engagement as a targeted, traffic-pushing reaction.

Internet is, for Chomsky, just an outlet for the content generated by major media publishers, which makes it insignificant in any investigation regarding the viability of the propaganda model. Social media are interesting only in the sense in which they create bubbles, due to the fact that “People tend to go to things that just reinforce their own opinions”, which Chomsky readily admits (Macleod, 2019). The reasons for excluding internet and social media from further investigation within the framework of propaganda model could not be more clearly stated.

Social media bubbles are result of the algorithm-driven and potentially threatening filtering process, making its influence in a hyper-information media environment an unavoidable part of evaluating the manufacturing of consent. The term hyper-information points to a media environment overloaded with information to such an extent that information loses its purpose of reducing uncertainty. 500 hours of video material gets uploaded to YouTube every minute, which translates to 30.000 hours per hour (Statista, 2022). Even if 99% of the uploaded content is not a life-changing scientific or artistic masterpiece, some of it does have the potential to broaden the views of the public. For instance, the three-hour documentary *Manufacturing Consent: Noam Chomsky and the Media* (Achbar, Wintonick, 1992) uploaded to YouTube in 2017 was seen by 7.380.638 people, which is a reach not even Chomsky can neglect. The term also follows Baudrillard's concept of hyperreal(ity):

“The realm of the hyperreal (e.g., media simulations of reality, Disneyland and amusement parks, malls and consumer fantasylands, TV sports, virtual reality games, social networking sites, and other excursions into ideal worlds) is more real than real, whereby the models, images, and codes of the hyperreal come to control thought and behavior” (Stanford Encyclopedia of Philosophy, 2019).

In the hyper-real world, objects are in a state of “ecstasy”, of seemingly endless proliferation and expansion. Such objects are outside of or beyond themselves: the beautiful as more beautiful than beautiful in fashion, the real more real than the real in television, sex more sexual than sex in pornography (Stanford Encyclopedia of Philosophy, 2019).

Whatever the quality or relevance of the information, the quantity of data available on the internet is a frightening fact because it radically questions the ability of ordering, organizing and understanding such a quantity of information. In a hyper-information environment, information is ecstatic: the information as more informative in hypertext, available as more available in www, knowledgeable as more knowledgeable on the internet. In a world where information is everything, meaning is retreating and “Information devours its own contents; it devours communication and the social...” (Baudrillard, 1983).

So the circle closes: from Lippmann’s un-informed, over Herman and Chomsky’s dis-informed to Baudrillard’s hyper-informed. If information and facts were crucial, Fukuyama would be right. It seems, however, that they are not and that he is hyper-wrong.

Conclusion

The technological paradigm switch and the ever-accelerating development of ICT feeds the optimism in all segments of society. We create and share more knowledge than ever, reach each other across the globe simultaneously, and create complex models based on unimaginable amounts of big data, which enables us to predict the elements of future more clearly than ever. If there is power in such world, it surely must be the power of technology, calculation, facts, information and knowledge. And yet, as the research shows, Herman and Chomsky claim that their 1988 propaganda model is still in operation, and actually gains relevance. Even though the switch in technological paradigm changed the economy, politics, science, art and society in general, they claim that nothing has changed in the way power is being upheld. The research also shows that their propaganda model is far from original, and that they selectively recycled Walter Lippmann’s 1922 concept of manufacturing of consent, deliberately omitting the parts that did not fit the underlying Marxist, anti-capitalist and critical

theoretical framework. Following the classical Marxist power equation, Herman and Chomsky simply replaced the industrial era means of production with information era (mass media) means of production, claiming that in the information-oriented society powerful have the power because they control the production, distribution and access to information. Problems with their interpretation of Lippmann's inspiring concept do not stop at the level of selective recycling and mixing it with outdated and unusable social and economic concepts. Their interpretation seriously simplifies Lippmann's insights, disregarding completely the role of individuals in the information-based power game. Lippmann knew that the problem with information and facts was not primarily in their availability, but in the cognitive limitation of persons receiving it. Crucial factors which limit our access to the facts, even before any attempt had been made to manipulate them, have to do with inherent and almost a priori weak spots of human cognitive functions, explained later on by behavioural economics. While Lippman considers the technical aspect of media and creates the basis for McLuhan's later conclusion that "medium is the message", Herman and Chomsky completely disregard the technical aspect, because it challenges their model and its theoretical basis. By disregarding the technical aspect, they disregard the new, hyper-information media environment, and fail to recognize that Lippmann's uninformed, their dis-informed and Baudrillard's hyper-informed people share similar problems because access to information and facts is obviously not the solution.

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PROIZVODNJA PRISTANAKA U HIPERINFORMACIJSKOM DOBU

Sažetak

Gotovo 35 godina od objavljivanja Manufacturing Consent Hermana i Chomskog, svijet je prošao kroz značajne transformacije. Za autore, moć se pojavljuje u interakciji između (medijskih) korporativnih i državno-političkih struktura, koje održavaju status quo, promoviraju željene promjene ili ograničavaju nepoželjne težnje u javnoj sferi. Moć više nema jedinstvenog posjednika u obliku državno-političkog represivnog aparata i dolazi kao rezultat interakcije višestrukih sila, dok je istina stvar ovoga svijeta, proizvedena pomoću višestrukih oblika ograničenja, kako piše Foucault u "Moć/Znanje". Proizvodnja pristanka pripisuje se masovnim medijima i propagandom modelu unutar kojeg mediji stvaraju parcijalnu sliku otvorenih pitanja, onemogućuju dostupnost alternativnih pristupa i odabiru materijale za objavu u skladu s dominantnom političkom strukturom. Takav model moći funkcionira pod uvjetom kontrole masovnih medija i nakladništva općenito. Rad pridonosi razumijevanju promjena uzrokovanih tehničkim, digitalnim pomakom koji je (potencijalno) omogućio svakom pojedincu da postane izdavač i izravno sudjeluje u oblikovanju javne sfere. Poplavom objavljivanja na društvenim mrežama i portalima pitanje kontrole objavljenih sadržaja i dostupnosti alternativnih pristupa pretvorilo se u svoju suprotnost. Više nije problematično kako probiti medijsko-korporativnu blokadu, već kako algoritmom blokirati ulazak "alternativnih činjenica", lažnih vijesti i opscenih stavova u javnu sferu. Pregled relevantne literature, rezultata istraživanja iz sekundarnih izvora te kvantitativnih pokazatelja korištenja suvremenih elektroničkih medija otkrivaju razmjere transformacije suvremenog društva. Rezultati pokazuju da s izlaskom informacija u prvi plan značenje odlazi u drugi plan, a zadiranje privatnog u javni prostor rezultira postupnim rastakanjem privatne i javne sfere.

Ključne riječi: hiperinformacija, medijsko okruženje, proizvodni pristanak, moć, propaganda

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THE POWER OF (UNCONVENTIONAL) MARKETING IN FUNDRAISING: THE PERSPECTIVE OF THE CULTURAL SECTOR

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Abstract

This paper analyzes the importance and use of marketing for fundraising in the cultural sector. Namely, due to limited public financial resources and social changes in general, the cultural sector should turn to the market and to new sources of financing and implement a fundraising strategy. Activities are needed to attract financial resources from various sources to ensure the income necessary for its operation and sustainability.

To be successful in fundraising and ensure stable business, the cultural sector needs to implement various activities that are usually associated with the profit sector (planning, management, marketing, analysis), which also includes an entrepreneurial way of thinking and acting. This paper aims to identify the role of marketing in fundraising and the effectiveness of marketing strategies for the success of fundraising in cultural institutions. Empirical research was conducted on cultural institutions in the Republic of Croatia with an emphasis on the use of unconventional marketing for fundraising purposes. The conclusion is that this type of marketing affects the successful collection of funds and, ultimately, the success of the business and the financial result of the cultural institution. The results of the research indicate that it is necessary to implement an appropriate marketing strategy for the purpose of successful fundraising, as well as to educate the employees of cultural institutions in the field of marketing and fundraising.

Keywords: fundraising, financing, cultural sector, (unconventional) marketing

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Introduction

“Unlike a business organization that is focused on profit in market conditions, an organization in culture has an almost completely different mission and environment. Its primary task is to provide an appropriate cultural product or service that will be available to the wider community as a component of the culture of living. Organizations in culture do not aim to generate as much profit as possible, and therefore the principles of economic organization do not apply to them. Namely, their activity, and even their survival, is not essentially tied to their economic result, but to the accomplished or unfulfilled mission that represents the public interest of the community” (Antolović and Turkalj Podmanicki, 2010, 154).

Acknowledging the above and the significance that cultural institutions have for the society and the environment, to fulfill their mission and ensure the quality and quantity of their work, said institutions also need financial resources. However, public funding of the cultural sector (particularly publicly-owned institutions) has been decreasing for years (Bestvina Bukvić, Šain and Maršić, 2018; Bestvina Bukvić, Mihaljević and Tokić, 2016; Bestvina Bukvić, Mihaljević and Tokić, 2015). They should therefore focus on other sources of funding and secure additional income and somehow become “profit making organizations” even though profit is not their primary goal (Krivošejev, 2012). “Regardless of the fact that not all institutions in the field of culture and art can be classified as nonprofit organizations, most of them nevertheless carry out activities specific to the nonprofit sector – such as raising funds to finance their own activities in order to implement the programs and projects intended for their users” (Pavičić, Alfrević and Ivelja, 2006, 258). Fundraising is becoming inevitable in all organizations, especially nonprofit organizations (Balog, 2011; Balog 2010). It is defined as all the activities carried out in a nonprofit organization to ensure the income necessary for its sustainability and the implementation of its mission; that is, it refers to the art of asking for money from people and corporations to finance its own activities (Dadic, 2016). According to other definitions, fundraising is a set of skills and techniques used in the process of obtaining funds from external sources to finance activities in the field of culture and nonprofit organizations (McIlroy, 2001, 9), with the primary goals of ensuring the organization’s growth, development, and involvement of stakeholders in the organization

itself (its work and activities), as well as increasing the visibility, efficiency and stability of the organization (Alfirević, Pavičić and Najev-Čačija, 2013, 600). Kelly (1998 as cited in Jung, 2015, 257) defines fundraising as the process of “identifying, building and maintaining relationships with individuals, corporations and foundations that typically give money”. Fundraising means ensuring diversity of funding sources in the organization and raising funds from alternative sources, which (according to Šain, Haršanja and Borić Cvenić, 2020; Bestvina Bukvić et al., 2018) include: donations and sponsorships (from corporations and individuals), project financing, various grants, own income through ticket sales and audience increase, various economic activities such as renting space, souvenir shops, providing professional services, issuing publications, organizing various (cultural) events, etc.

The diversification of funding sources, according to Čopič (2011), is the basis for a healthy future and strengthens the financial resilience of cultural organizations. For other authors, it is one of the prerequisites for gaining stability and establishing conditions for the survival of organizations in turbulent times, but also one of the key parameters for evaluating the success of its development (Dragojević and Dragičević-Šešić, 2008), as well as the organization’s readiness for changes in the environment, creating greater credibility and recognition of the organization in the public while increasing the quality of the program itself (Miletić, 2014: 7), which ultimately contributes to the development of the audience (Buljubašić, 2020) and a better financial result of the organization (Bestvina Bukvić, Borić Cvenić and Buljubašić, 2017).

Fundraising is considered a managerial discipline that, due to reduced financial resources, is becoming increasingly important in the management of cultural institutions (Šain et al., 2020), which is in line with the fact that fundraising is viewed not only as part of the overall marketing strategy but also as a separate strategic and implementation unit (Pavičić, 2003). According to the above, fundraising is not a one-time activity, but a long-term process and skill (Krivošejev, 2012), which requires constant development and which, together with marketing, is inseparable in cultural institutions and organizations in general. To be as successful as possible in fundraising and to ensure stable business, including market success, economy and work efficiency, cultural institutions should include an entrepreneurial way of thinking, the use of managerial tools and techniques

(including strategic planning, marketing, management, etc.) (Bestvina Bukvić et al., 2018; Bestvina Bukvić et al., 2016).

In this paper, emphasis is placed on marketing and marketing strategies as an important function in fundraising. Marketing in culture has the task of contributing to the best possible visibility of the program and the best possible familiarization of the program (and the institution itself) with the environment (Lukić, 2010), strengthening the image in the public (Wywmer, Knowles and Gomes, 2006 according to Najev Čačija, 2013, 66), which affects the position of the organization in the eyes of potential donors (Najev Čačija, 2013, Balog, 2010), and ultimately the increase in the number of visitors or audiences (Buljubašić, 2020), considering that the attendance or fund raising from the audience is one of the key elements of measuring business success in cultural institutions (McClroy, 2001). The use of marketing to raise funds is the activity of a nonprofit organization that, using the marketing concept, marketing-mix, and marketing techniques, periodically or continuously tries to interest, attract, and retain potential donors (Balog, 2011) as well as the audience (Krivošević, 2012). Accordingly, the use of marketing in fundraising aims to attract and retain potential donors and the audience.

Although marketing should serve to increase visibility and develop a (new) audience, research shows that marketing in culture is perceived as a “wasteful” activity and an unwanted source of costs, considering it unnecessary for the achievement of goals (Bennett, 2007 according to Najev Čačija, 2016, 4) and that there is a negative attitude toward the use of marketing in cultural institutions (Dragičević-Šešić and Stojković, 2013; Pavičić, Alfirević and Aleksić, 2006), especially toward the application of unconventional marketing (Buljubašić, 2015).

However, many authors agree that the introduction and use of marketing in culture and cultural institutions is important (Šola, 2001, Pavičić et al., 2006a), considering that it is recognized as an important segment of building vitality and better economic health of cultural institutions (Ames, 1989 as cited in Šola, 2001, 80; Dragičević-Šešić and Stojković, 2013). To reduce fear and a negative attitude toward marketing, leaders of cultural institutions should be introduced to marketing, its possibilities and ways to use it for the purpose of a successful business (Buljubašić, Mioč, Jobst, 2020a), because “without marketing and sound public relations strategies,

fundraising becomes extremely difficult” (Jung, 2015, 257); that is, it is very difficult to expect an adequate implementation of fundraising without good marketing.

The paper aims to identify the role of marketing in fundraising, effective marketing strategies and their effect on fundraising results.

In accordance with the objective of the paper, the authors asked the following research questions:

RQ1. What is the role of marketing in fundraising in cultural institutions?

RQ2. What is the impact of marketing activities (especially nonconventional activities) on the success of fundraising and the financial result of a cultural institution?

RQ3. Is there a difference in the perception of the importance of marketing in fundraising depending on the type of cultural institution?

To answer the questions, the paper examines previous research regarding the role of marketing in fundraising, combining it with the results of empirical research conducted in cultural institutions (galleries, theaters and museums) in the Republic of Croatia, focusing on the use of unconventional marketing to raise funds. The business philosophy of unconventional marketing is to achieve maximum results with minimal financial investments (Buljubašić, Mioč and Jobst, 2020b). It is a different and alternative way of thinking (technique or method) that achieves given conventional goals through unconventional methods, i.e., the unconventional tactics a company uses to promote its product or service⁸⁴. In particular, unconventional marketing is based on creative marketing that seeks to shock, provoke, and cause surprise in unexpected situations and in unexpected places to be as impressive as possible and grab the attention of its targets (Levinson, 2008).

Previous research

According to Lukić (2010), successful marketing in culture can create crowds and lines in front of the entrance to a theater, gallery, or concert hall, can fill the stands for off-season performances, sell out subscriptions

84 URL: <http://www.investopedia.com/terms/g/guerrilla-marketing.asp>

to the theater season in advance and generate significant income for cultural institutions. Additionally, it can build strong and lasting mutual relations between the institution and its patrons and sponsors and spark the audience's interest in programs that would not naturally be interesting at all by themselves.

Najev Čačija (2013) associates marketing activities with the establishment of a long-term relationship with the donor as a crucial element of the success of fundraising, with the assumption of the existence and feedback of the success of fundraising on the definition of marketing activities. Namely, nurturing and marketing relationships (Sargeant, West & Jay, 2007 as cited in Najev Čačija, 2013, 67) is one of the most important perspectives for evaluating relationships with key stakeholders in the context of successful fundraising. Christopher, Payne and Ballantyne (2002 as cited in Najev Čačija, 2013, 67) define relationship marketing through the organization's commitment to extending the life of existing stakeholders/donors by using a retention strategy and the concept of focusing marketing activities on multiple markets and stakeholders, which should be achieved through cross-functional cooperation within the organization but also with a strategic (rather than transactional) approach to the donor. Building and marketing relationships as a fundamental activity of successful fundraising includes continuous communication with donors, creation of friendships with donors, expression of gratitude and respect, activities to bring donors closer to the organization's programs and staff, creation of partner networks, and more. Sargeant (2001) introduces the term "relationship fundraising", according to which nonprofit organizations should build a relationship with donors so that they would donate to the nonprofit organization in the long term.

Kaiser (2019) states that focused or targeted marketing can contribute to an organization's ability to raise money in a short period of time and with limited resources – focused marketing selects in advance the targets to which the campaign will be directed (primarily wealthy individuals, company directors but also politicians whose opinion is valued). Focused marketing in this case, the author states, is the organized, permanent nurturing of good relations with potential donors, and the ultimate goal is to encourage them to become involved in the work of the organization as donors, ticket buyers or even board members. Kaiser and Egan (2013) emphasize the importance of aggressive (programmatic and institutional)

marketing in promoting culture and works of art, which will provide the visibility needed to attract audiences and potential donors. They believe that successful organizations in arts and culture aggressively promote their program and the institution behind it. Institutional marketing uses all institutional resources: physical (buildings, costumes, collections, etc.), human (exterior and interior) and experiential (artistic process, dinner, tour and “backstage” tour) to “soften” potential customers (audience, members, donors, board members, collaborators, selectors or exhibitors, volunteers, etc.) to the extent that they will support the work of the institution without special sales.

Bestvina Bukvić et al. (2017) analyze the factors that influence the attendance of cinemas and theatres and their business and financial results. In their research, they proved that marketing in culture facilitates communication with the audience (existing and potential), and marketing activities need to be carried out regularly to achieve successful operation of these organizations. The authors state that, in defining their marketing and business strategy, cinemas and theatres should conduct market research and shape their business models and marketing strategies in accordance with these findings, given that failure to follow the demand in the market can strongly affect their attendance and thus their business and financial results.

Research by Buljubašić, Borić and Hartmann-Tolić (2016) found that promotion is one of the most popular, widespread, and influential elements of marketing, which plays an important role in cultural institutions because it can attract a large number of visitors. The results of their research showed that promotion has a positive impact on museum attendance, and unconventional forms of promotion (such as social networks, ads on sugar packets, innovative promotion of, for example, theater plays – such as presentations of dialog parts of plays in unexpected places, street communication between actors and citizens, short video promotions, etc.) have a more significant impact than conventional forms of promotion (guest appearances on national and local television and radio stations, advertising in local daily newspapers and internet portals, etc.). The objective of Buljubašić’s (2020) study, which covered 612 respondents, was to determine the role that advertising activities play in theater attendance among young audiences. The conclusion was that generation Z prefers advertising on social networks and will be attracted to cultural and theater events in

this way, while generation Y, for example, will be attracted to the same events by the recommendation of a friend. Therefore, it can be confirmed that the younger audience (Generation Z) relies on technology more than Generation Y, and that the marketing targeting them should be adjusted accordingly. This confirms the results of the study by Balog (2011), who analyzes possible use of social marketing by civil society organizations to raise funds for their programs and projects, and finds that by using the concept of social marketing, organizations can achieve better results than by using individual marketing tools. In his empirical research, Najev Čačija (2016) confirms that marketing activities by humanitarian non-profit organizations have a positive impact on the success of fundraising and a positive financial result. In his study encompassing 52 public and private theatres in the Republic of Croatia, Mihaljević (2015), among other things, analyzed the importance of certain factors for better attraction of donations and sponsorships, i.e., fundraising in the theater, observing the role and importance of the state, theaters and the business sector in fundraising. The education of the theater management about fundraising was found to be most important factor for better attraction of donations and sponsorships, followed by the social awareness of the business sector, stimulating legislation and theater marketing.

Kaiser and Egan (2013) developed a fundraising model for cultural institutions (Cycle model) where they determine that successful fundraising requires four components to be satisfied in the following order: quality program (art), aggressive marketing, family, and money. That is, according to their model, a good fundraising plan starts with good, quality art that needs to be aggressively (both institutionally and programmatically) promoted to attract the audience, potential donors and sponsors, and new board members (family) who will provide the funds needed for the operation of the institution and a new cycle. The above model is consistent with the results of the research by Bestvina Bukvić et al. (2017), who found that the most important influencing factors that attracted students to visit the theater were the quality of the theater program and the price of tickets. Therefore, the younger population strongly responds to the quality of the program. With this in mind, cultural institutions should, first of all, have a quality program, and only then start marketing activities that will give their program visibility, and attract the audience. Namely, “marketing can never and nowhere create a cultural program or guarantee its quality.”

Marketing in culture should by no means be expected to guarantee the quality of a program, such as a play in a theater or an exhibition in a museum or gallery, because this is not its task⁸⁵ (Lukić, 2010, 188). Quality is also an important factor in fundraising, i.e., the allocation of financial resources because potential donors and sponsors, when choosing a project, will rather endorse and support a high-quality, creative and innovative product or project (Mihaljević, 2015), but, according to many authors, quality should be important when allocating public financial resources (Dragičević-Šešić and Stojković, 2013), especially to public institutions that are already used to continuously receiving such funds (Krivošejev, 2012; Mikić, 2011; Lončar, 2013; Đukić, 2010).

Kaiser (2013) states that increased recognition has an extremely strong influence on the collection of financial resources and that some cultural institutions therefore need to hire more employees in their organizations. Most cultural institutions, especially in the Republic of Croatia, do not have special marketing departments in their organizations or marketing programs. According to Buljubašić (2015), progress is visible in the theater industry, where although almost all theatres have a marketing department, they do not use marketing strategies to attract different types of potential visitors, which indicates a lack of systematic research and a consequent lack of understanding of potential visitors. Likewise, public theatres, unlike private theatres, are less oriented toward fundraising, where the share of their own revenues and corporate support (donations and sponsorships) in the revenues of public theatres is not sufficient (Bestvina Bukvić et al., 2015), which indicates a lack of motivation or knowledge of public theater employees to become involved in fundraising in the market. Bestvina Bukvić et al. (2018) show the structure of financing institutions and business ventures in culture, establishing that the situation in cultural institutions has not yet changed significantly; that is, fundraising techniques are clearly insufficiently used, because cultural institutions in the Republic of Croatia are still too dependent on funding from public sources. According to the results of the research, there is a recognized need to increase the level of knowledge and employment of experts in the field of fundraising. This conforms to the findings of the research of nonprofit organizations by Pavičić et al. (2006b), Dadić (2016) and Najev-Čačija (2013), who believe

85 URL: http://www.adu.unizg.hr/prilozi/dokumenti/clanci/Lukic_Kazalisno_trziste.pdf

that the lack of knowledge in this segment will be an obstacle to the further development of these organizations. Alfirević et al. (2013) believe that successful fundraising could be achieved by combining one's own abilities and knowledge with the flexible employment of external associates and consultants. Namely, for some specific projects and programs, cultural organizations can hire external collaborators who will help them attract new donors and sponsors and search for new sources of funding in order to develop new and effective approaches to fundraising. Dadić (2016) states that many serious organizations in other countries have a complete department responsible for fundraising, and that there are a number of consulting companies that specialize in consulting in the field of fundraising. Šain et al. (2020) find a solution, among other things, in the role of the state, which should establish study programs at educational institutions or courses for fundraising based on the model of developed countries. In regard to the relationship between unconventional marketing and cultural institutions (museums, galleries, and theaters) in the Republic of Croatia, according to Buljubašić, Ham and Pap (2016), the lack of experience and knowledge is identified as the greatest obstacle to the implementation and use of unconventional marketing in cultural institutions.

Empirical research

The authors did a survey in cultural institutions operating in the Republic of Croatia to determine the importance and role of unconventional marketing in fundraising by cultural institutions. Although, according to Antolović (2010), institutional culture includes archives, museums, galleries, libraries, theatres, cinemas, music institutions, and multipurpose cultural institutions, this paper narrows down the concept of cultural institutions to galleries, theatres and museums. The survey included 444 institutions (Table 1), of which 154 theatres, 189 museums and 101 galleries. A total of 225 responses were received electronically, which translates to a return rate of 50.68%, a satisfactory response considering the sample and the ratio according to the type of cultural institution. In this research, fundraising is viewed through an increase in the number of visitors because attendance, i.e., acquisition of funds through the audience (own income), is one of the key elements of measuring business success in cultural institutions (McIlroy, 2001, 23), which can significantly influence the business and the

financial results of those institutions (Bestvina Bukvić et al., 2017). The importance of unconventional marketing for increasing the institution's profit is also analyzed, assuming the existence of a feedback loop of minimal financial investment in marketing.

The survey used a pre-structured questionnaire addressed to cultural institutions. A questionnaire is a useful method of data collection when the researcher's focus is on a large number of respondents (Horvat and Mioč 2012). Data collection by a questionnaire, according to Halma (2001), implies a process that allows the researcher to generalize the results from the sample to the population. The collected data were analyzed using the IBM SPSS Statistics 22.0. software package and MS Office Excel.

Table 1. Research sample

Institution type	Number of institutions included in the research	Sample	% of returned responses
Galleries	101	40	39.60%
Museums	189	84	44.44%
Theatres	154	101	65.58%
Total	444	225	50.68%

Source: Authors' work

Research results

Below are the results of research that examines the role of unconventional marketing in the importance of fundraising, which is manifested through an increase in the number of visitors and the realization of one's own income and ultimately the financial result of the institution.

Table 2. Research results on the importance of unconventional marketing in fundraising

Statement	n	Arithmetic mean	Standard deviation
Unconventional marketing can contribute to increasing the number of visitors.	225	4.67	0.543
Unconventional marketing can contribute to increased profits with minimal financial investment in marketing activities.	224	4.54	0.791

Source: Authors' work

Table 2 shows the statements that were measured on a 5-point Likert scale, and it can be seen that all respondents agree that unconventional marketing can contribute to an increase in the number of visitors ($\bar{x} = 4.67$) and profit ($\bar{x} = 4.54$).

The following table shows the results of the same statements and measures their statistical significance.

Table 3. Results of statistical significance on the importance of unconventional marketing in fundraising

Statement	n	F scale	p
Unconventional marketing can contribute to increasing the number of visitors.	224	3.305	0.038*
Unconventional marketing can contribute to increased profits with minimal financial investment in marketing activities.	223	4.523	0.012*

Source: Authors' work

**variables measured on a 5-point Likert scale*

** at the significance level of 5%*

The results of the ANOVA procedure show a statistically significant difference (at a significance level of 5%) for the claim that unconventional marketing can contribute to increasing the number of visitors ($F=3.305$,

$p= 0.038$) and that unconventional marketing can contribute to increasing profits with minimal financial investment in marketing activities ($F=4.523$, $p=0.012$).

Table 4. Results of the ANOVA statistical procedure for the type of institution and the importance of unconventional marketing in fundraising

Statement	Type of institution	n	Arithmetic mean	Standard deviation
Unconventional marketing can contribute to increasing the number of visitors.	Galleries	40	4.73	0.506
	Theatres	101	4.74	0.462
	Museums	84	4.55	0.629
Unconventional marketing can contribute to increased profits with minimal financial investment in marketing activities.	Galleries	40	4.63	0.705
	Theatres	101	4.67	0.694
	Museums	84	4.34	0.901

Source: Authors' work

An analysis of the average ratings by types of cultural institution in relation to the statements made shows that all types of institutions understand the importance of unconventional marketing in increasing the number of visitors and the institution's profit, with galleries and theaters paying slightly more attention to it in both statements than museums.

The ANOVA test for independent samples tested the possible existence of statistically significant differences between the responses of cultural institutions to the stated claims.

Table 5. ANOVA test for independent samples on the statement "Unconventional marketing can contribute to an increase the number of visitors"

	Galleries (p)	Theatres (p)	Museums (p)
Galleries	-	0.861	0.087
Theatres	0.861	-	0.015*
Museums	0.087	0.015*	-

Source: Authors' work
*at a significance level of 5%

Observing the differences between institutions with regard to the tested variables, we conclude that there is a statistically significant difference, at a significance level of 5%, according to the type of institution (theatre – museum, $p= 0.015$) in responses to the claim that unconventional marketing can contribute to an increase in the number of visitors.

Table 6. ANOVA test for independent samples on the statement “Unconventional marketing can contribute to increased profits with minimal financial investment in marketing activities”

	Galleries (p)	Theatres (p)	Museums (p)
Galleries	-	0.740	0.056
Theatres	0.056	-	0.004*
Museums	0.056	0.004*	-

*Source: Authors’ work
at a significance level of 5%

Observing the differences between the institutions with regard to the tested variables, it is concluded that there is a statistically significant difference, at the significance level of 1%, according to the type of institution (theatre – museum, $p= 0.004$) in responses to the claim that unconventional marketing can contribute to increasing profits with minimal financial investments in marketing activities.

Discussion

Based on theoretical assumptions and empirical research, the paper analyzed the role and importance of marketing in fundraising in cultural institutions. The results of empirical research, which was conducted in cultural institutions (galleries, theaters and museums) in the Republic of Croatia, found that cultural institutions understand the importance and role of unconventional marketing for successful fundraising, which is manifested through an increase in the number of visitors (which affects an increase in their own income) and finally the financial result of the institution. According to the above, unconventional marketing methods have a positive effect on the development of audiences in cultural institutions, especially young audiences (Buljubašić, 2020; Buljubašić et al.,

2016), and cultural institutions should use such methods if this type of audience is their target group. Likewise, the increased number of visitors or audiences is extremely important for potential sponsors because the audience is extremely important for the provider of sponsorship funds, given that the goal of providing such funds is usually promotion, recognition and image (Mihaljević, 2015). Through the implementation of marketing activities, cultural organizations should win over the “family” (ticket buyers, students, members of the board of directors, donors, financiers and volunteers), which is the most important factor of the organization, given that it strengthens the financial health of the organization through the investment of one’s own time, talent, personal contacts and financial resources (Šain et al., 2020; Kaiser and Egan, 2013). Therefore, it is necessary to apply various marketing methods to attract the public to cultural institutions and obtain more media space, thus facilitating the inflow of funds from the business sector in the form of donations and sponsorships as well as increasing the audience. In view of the above, the importance of applying the marketing approach in fundraising can be seen.

The results of empirical research also confirm the thesis that nonconventional marketing can contribute to increased profits, assuming the existence of a feedback loop of minimal financial investment in marketing. This is in accordance with the research of Najev Čačija (2013), where the implementation of marketing activities while establishing long-term relations with the donor is the most important for successful fundraising, assuming the existence and feedback effect of fundraising success on defining marketing activities. The above would mean that by establishing a longer-term relationship with potential stakeholders (audience, donors, and sponsors), cultural institutions will carry out marketing activities in a simpler way (they will invest less time and financial resources in designing marketing activities) to collect the funds they need for further business. Namely, the goal of marketing in fundraising is not only to secure one-time (ad hoc) funds from different donors or audiences but also to keep them, which is a major challenge for people in cultural institutions and organizations in general. This confirms the findings of Kaiser and Egan (2013), who underline that it is necessary to focus on a long-term relationship with the donor, not only on one-time activities, but also to nurture and cultivate relationships with them in an organized manner to keep them in the long term because they are a safe input for us in the future.

However, for cultural institutions to be able to carry out marketing activities, it is necessary, in addition to having a marketing plan, to have a person or a department in the organization who will be responsible for this type of work (Buljubašić, 2015; Kaiser, 2019), as well as to have the experience and knowledge in the use of marketing principles and activities (Najev Čačija 2013), as well as different marketing strategies, such as nonconventional marketing, whose main feature is creativity and minimal financial investments (Buljubašić et al., 2020a), which is extremely desirable for cultural institutions facing a reduction in (public) financial resources (Bestvina Bukvić et al., 2018; Bestvina Bukvić et al., 2015). Balog (2010) states that in the conditions of reduced financial resources, additional involvement of cultural institutions in fundraising is needed, in the sense that they are willing to do additional work unpaid by the state. Hence, the author believes that good cultural institutions are recognized, among other things, by the constant growth of the share of financing from their own sources, especially in conditions of socioeconomic transition and economic recession. Therefore, the importance of developing fundraising skills (how to implement it, how to identify and maintain contacts with donors, sponsors, target groups and audiences, etc.) is evident, as this could enable the productive and continuous work of cultural organizations, as well as the necessary adaptation to rapid social changes (Balog, 2010). Considering the potential that unconventional marketing has in cultural institutions in the fundraising segment, it is necessary to understand the importance of applying marketing activities to the benefit of the financial results of cultural institutions and to employ or train employees in the field of marketing (Najev-Čačija, 2013) and to continuously invest in their knowledge considering the different possibilities of applying marketing and the global or technological changes to which it is necessary to adapt. Therefore, additional investment in human resources and expertise in marketing and fundraising skills appears to be the key to the future survival of cultural institutions. In this segment, in addition to the organizational distribution within the organization, the importance of the role of the state and cultural policy holders in providing support in improving the activities of such institutions through “defining appropriate regulations, motivational models, information, education, networking, because it seems that the measures that were inadequate” (Bestvina Bukvić et al., 2018, 436).

Depending on the type of cultural institution included in the sample (galleries, theatres, museums), the results of the empirical research show that there is a statistically significant difference between theatres and museums in understanding the importance of unconventional marketing in contributing to the increase in the number of visitors that influence the increase in the institution's own income and ultimately increasing profits. It was stated in accordance with the research (Bestvina Bukvić et al., 2017; Balog, 2011) that marketing must be adapted to the industry itself, i.e., the institution and the specific demographic characteristics of its target group, as well as that the fundraising model (Najev Čačija, 2013) should include all elements of marketing management: analysis, planning, implementation and control. Therefore, it is necessary to choose and shape an appropriate marketing strategy in accordance with the previous analysis of all stakeholders, i.e., target groups, which will, among other things, affect the success in fundraising and thus also the business (financial) results of the cultural institution.

Conclusion

For cultural institutions to fulfill their goals and ensure stable growth in the future, they need financial resources. Considering the continuous reduction of funds from public sources for financing their business, cultural organizations must turn to fundraising activities and obtain financial resources from other (alternative, market) sources. The paper analyzes the role and importance of marketing for the purpose of collecting funds in the cultural sector, and determines that marketing and fundraising are inseparable activities because the successful application of any marketing strategy affects easier and improved fundraising. The empirical research in this paper focuses on the application of unconventional marketing in fundraising by increasing the number of audiences and achieving a higher own income and ultimately a better financial result for cultural institutions. The results of the survey in 225 cultural institutions (galleries, theaters, and museums) in the Republic of Croatia established the statistical significance that unconventional marketing is recognized as important in collecting funds from the audience and making a profit, assuming the existence of a feedback loop of minimal financial investment in marketing. A statistically significant difference in dependence on the type

of cultural institution was found in theatres and museums. Therefore, if good, appropriate marketing is applied in cultural institutions in accordance with the target stakeholders, it is possible for it to achieve exceptional business results but also achieve a better connection with all stakeholders that are important for its operation and development. With the aim of improving the application of fundraising for the purpose of better financial operations of cultural institutions, the importance of applying a marketing approach in fundraising (attracting a larger number of audiences, potential donors, and sponsors) is noted. Likewise, the need for additional investment in human resources in the field of fundraising and (nonconventional) marketing in cultural institutions in the Republic of Croatia is indicated, given that the lack of knowledge and experience in this area was determined in the theoretical part of the research.

The results of this research can motivate cultural institutions to apply marketing in fundraising, that is, to understand the role of marketing and the application of an appropriate marketing strategy for the challenge of collecting additional financial resources. The limitation of the research refers to the absence of research in the subject area in relation to the form of ownership of the cultural institution (private and public), since it is a factor that significantly defines the way of doing business, which is also a recommendation for future research.

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MOĆ (NEKONVENCIONALNOG) MARKETINGA U FUNDRAISINGU: IZ PERSPEKTIVE KULTURNOG SEKTORA

Sažetak

Ovaj rad analizira važnost i primjenu marketinga za prikupljanje financijskih sredstava u kulturnom sektoru. Naime, uslijed ograničenih javnih financijskih sredstava i društvenih promjena općenito, kulturni sektor treba se okrenuti tržištu i novim izvorima financiranja te provoditi strategiju fundraisinga odnosno aktivnosti privlačenja financijskih sredstava iz različitih izvora kako bi osigurali prihode neophodne za svoj rad i održivost. Kako bi bili uspješni u fundraisingu i osigurali stabilno poslovanje, kulturni sektor treba provoditi različite aktivnosti koje su prvenstveno svojstvene profitnom sektoru (planiranje, menadžment, marketing, analiza), što uključuje i poduzetnički način razmišljanja i djelovanja. Cilj rada je identificirati ulogu marketinga u fundraisingu te učinkovitost marketinških strategija na uspjeh u fundraisingu u kulturnim institucijama. U radu je provedeno empirijsko istraživanje na kulturnim institucijama u Republici Hrvatskoj s naglaskom na primjenu nekonvencionalnog marketinga u svrhu prikupljanja sredstava. Utvrđuje se da takva vrsta marketinga utječe na uspješno prikupljanje sredstava te u konačnici i na uspješnost poslovanja i financijski rezultat kulturne institucije. Rezultatima istraživanja ukazuje se na potrebu primjene odgovarajuće marketinške strategije u svrhu uspješnog fundraisinga, kao i potrebu edukacije djelatnika kulturnih institucija u području marketinga i fundraisinga.

Ključne riječi: fundraising, financiranje, kulturni sektor, (nekonvencionalni) marketing

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THE BRAND AS A TOOL OF MARKETING AND COMMUNICATION POWER

Scientific paper
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Abstract

Brand and brand development are central to any company given the principles of the market economy and emissions dynamics. In every market, where supply meets demand, there is also a competitive environment, and the brand is currently the main asset of every company, a representative and clear symbol of the image of the company and the products it offers in the target market. Demand in the free market has its limits, and excess supply over demand causes logical cannibalization in the market. The brand represents the company or the company's products and their characteristics, benefits, or, on the contrary, disadvantages and negative sides. Associations with a specific company or product can be the main, but not the only, incentive for the buyer's decision.

The role of the brand is irreplaceable for the company and has a direct impact on its functioning. Companies and their marketing teams are aware of the ever-increasing importance of the brand, but the professional community is even more aware of it, which has generated a huge amount of information about the brand and brand development. Several scientific disciplines, which themselves are still developing, deal with the issues related to branding. The dynamics of brand-related issues and brand development thus give companies the opportunity to find a new way and create a strong and popular brand on the target market in a competitive environment.

This paper aims to provide a comprehensive overview of the areas and information that are key to the brand and its proper management and development. Using selected positive and negative examples, we will show the power of the brand within the long-term success of the entire company.

Keywords: brand, brand marketing, brand elements, marketing, strategy

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Introduction

Brand has been used for centuries to distinguish products made by individual manufacturers (Keller, 2007, 32). According to Kotler and Keller (2013), a brand is one of the most valuable assets of a company. A strong brand combines art and science. The definition of a brand is the setting of a brand in terms of what cannot be seen: theoretical, symbolic or philosophical anchoring of the brand. Brand definition precedes visual representation. A brand is the link between the company and its customer, helping to remember and convey experiences and associations with the product or service that the brand represents. It is about the thoughts, feelings, and attitudes of customers towards a product or service (Podnikatel. cz, n.d.).

A brand plays several roles for both the customer and the company. Thanks to the brand, customers are able to identify the source of the product, the brand helps them determine the company's responsibility, reduces the risk associated with the product, and reduces the costs associated with product selection. At the same time, the brand represents a promise, commitment, or contract with the company, represents the symbol of the company and also gives a signal of quality to the customer (Keller, 2007, 39).

For a company, the brand represents a means of simplifying trading or searching for the company, and functions as a means of legal protection of product properties. The brand sends a signal of quality and represents unique associations that add value to the product. A brand can be one of competitive advantages and a source of financial return (Keller, 2007, 39).

According to Healey (2008), a brand is a promise of satisfaction. It is a sign, a metaphor, representing the contract between the producer and the customer, the seller and the buyer, the performer and the spectator. All consumers develop their own feelings about the content and meaning of a brand.

Literature review

The concepts of brand awareness and company image are also important in the study of brands (Keller, 2007, 98–101):

- **Brand awareness** consists of brand recognition and recall if a customer encounters and has been exposed to it.
- **Company image** is the public image of the company's identity, which defines what the company is or wants to be. Corporate identity combines the company's history, philosophy, mission, vision and people belonging to the company as well as its ethical values. The essence of the corporate identity, which is subsequently reflected in the image of the company, lies in the complexity of the image, and is formed by a number of tools that create this complexity and integrity (Vysekalová *et al.*, 2020).

Brand value

Customers tend to buy well-known brands because they trust them more than unknown brands. It has nothing to do with quality and utilitarian value, which is why brand value expresses the degree of influence on customers' purchasing decisions. Brand value is formed by the subjective perception of customers (a system of subjective associations that influence purchasing decisions). At the same time, the value of the brand has an effect on the value of the entire company, and for many companies it creates a significant part of their value (eg: Apple, McDonalds, Coca Cola) (ManagementMania.com, 2016).

Brand value corresponds to the extent to which customers perceive products or services bearing this brand as different and better, according to Clow and Baack (2008). Brand equity offers an interesting array of benefits. It allows the company to set a higher price for the product or service, and it also helps to maintain a larger market share compared to an indistinguishable product or service. Brand equity can be a source of better positioning within distribution channels and can deter consumers from seeking cheaper variants of a product or service, different promotions, discounts, and other incentives from other brands. Brand equity acts as a competitive advantage in a market with a large number of competitors.

Building brand equity

According to Kotler and Keller (2013), there are three groups of factors that influence brand value:

1. Brand elements or identities (names, web addresses, logos, symbols, brand representative, slogans, jingles, packaging (and labeling), or a combination thereof. The new and increasingly important element is the URL.
2. Product, service, and all accompanying marketing activities and supporting marketing programs.
3. Other associations indirectly transferred to the brand through its associations with other entities (person, place, or thing).

Elements are the means by which a brand can be identified and distinguished, and at the same time can be protected by a trademark. Marketers should focus on the brand elements that create the most value. Six criteria are used to select brand elements (Kotler and Keller, 2013, 288):

1. **Memorability** – ability to remember a brand element
2. **Meaningfulness** – the credibility of the brand element
3. **Likeability** – the aesthetic appeal of a brand element
4. **Transferability** – transferability of the brand element to other products
5. **Adaptability** – adaptability and degree of updating of the brand element
6. **Protectability** – legal protectability of the brand element.

Customers learn about a brand through a whole range of contacts and points: through personal observation and use, from other customers, interactions with company employees, online, over the phone and during payment transactions. Any experience that has an informational content, whether positive or negative, constitutes contact with the brand for an existing or potential customer. An integrated marketing program is used as a standard, which combines and coordinates marketing activities in such a way as to maximize individual and joint impact. These marketing activities should work individually as well as interlinked (Kotler and Keller, 2013, 289).

Secondary associations are the last of the group of factors of building brand equity. Secondary associations can link the brand to other sources of value, such as the company itself, countries or geographic regions, distribution channels, other brands, characters, advertising faces, sports, or cultural events (Kotler and Keller, 2013, 290-291).

One of the important activities of building brand equity is internal branding, i.e., making the brand promise a reality. It is an activity that the company educates and trains its employees in. When employees feel fully connected with and proud of the company they work for, they usually spread the word. Internal branding emphasizes the role of employees in the company's success. The results can be significant if a company can capture its mission and motivation for doing business and successfully communicate it to its employees (Netinbag.com, n.d.). Internal branding also increases employee loyalty and employee motivation, which can also bring secondary indirect benefits to the company.

The brand promise expresses the expectations that the brand offers to the customer, who expects the promise to be fulfilled. It is a summary of the benefits and values that the brand provides to the customer through the product or service (Podnikatel.cz, n.d.).

The digital age lends itself to brand communities, providing another opportunity to build brand equity and increase customer loyalty. The creation of a community can be initiated directly by customers, but the company should seize the opportunity. According to Kotler and Keller (2013), brand communities are identified by three characteristics:

1. A sense of belonging or a sense of perceived connection with a brand, company, product, or other community members.
2. Shared rituals, stories and traditions that give community meaning.
3. Shared moral responsibility or duty to the community and to individual members of the community.

The community can substitute, to some extent, the efforts of the company in the efficiency and effectiveness of marketing.

Brand positioning

STP – segmentation, targeting and positioning – is the basis for a marketing strategy. Positioning is a part of strategic brand management. The market offer must represent the right things. The goal is to choose the right place and thus imprint the brand on the minds of customers and potential customers. Properly executed brand positioning is a good starting position for marketing staff when developing the company's marketing strategy. Positioning reveals the essence of the brand and determines the goals to deliver to customers. Positioning must be present at all levels of the company and be understood by every employee (Kotler and Keller, 2013, 311–312).

Achieving a balance between the current state of the brand and the future state is a successful formulation of a customer-oriented value proposition. Marketers must identify and further communicate the similarities and differences between their brand and competing brands (Kotler and Keller, 2013, 312):

1. Determining the brand's frame of reference.
2. Delineation of optimal points of agreement and difference.
3. Creating a brand mantra.

All employees across the company should know the positioning of the brand, which is why marketing employees have to inform everyone about the brand setting through after it has been established.

In the communication of points of difference and agreement, it is possible to come across individual points that contradict each other. This can cause difficulty in brand positioning, for example promoting a brand as high-quality while claiming to be cheap. This is where compromises need to be found, and this is the job of marketing. Another possibility is to create a double campaign and promote each statement separately. Another entity can also be included in the campaigns that has the ability to convince the customer that the conflict between the characteristics is positive as a result (Kotler and Keller, 2013, 324).

Brand elements

Brand elements, also referred to as brand identifiers, are the signs that serve to identify and differentiate the brand (Keller, 2007, 204). The visual representation of the brand is absolutely necessary to identify and differentiate the brand in the target market. The portfolio of elements has grown widely over time with regard to new communication channels (websites, social networks). Nowadays, it is not enough to just create a company name, logo, and slogan, but it is also important to think about colors, font, brand representatives, url and more. For each company, these can be specific elements that it needs. The brand manual was therefore created for this purpose as the manual that combines all these visual elements into one document, comprising several pages. This manual is considered basic material for marketing personnel, which has to be followed not only by all employees in all departments of the company, but also by anyone who comes into contact with the company's brand in any way and wants to use it. The material explicitly tells how to visually present the brand externally.

Name of the brand

The name of the brand is a word designation of the brand, protected by a trademark by default. According to Healey (2008), a good brand name is synonymous with a good reputation. A logo or a promotion can be easily changed over time, but changing a brand name and getting customers to associate it with the old name is very difficult. The process of creating a brand name is called naming. The design must be based on STP and competitor analyses. Coming up with a brand name is a very creative process in which different procedures can be used (Podnikatel.cz, n.d.):

- testing combinations of existing words (AirBank),
- acronyms (Alza, Cedok),
- abbreviations (BUT, OVB),
- metaphors (Amazon),
- reference to the founder (Bata),
- institutional forms (Czech Railways),
- connection with the locality (Vodnanské kure),

- foreign words (Home Credit, Contigo).

The brand name should be memorable, stand out sufficiently from the competition in the market, be easy for customers to pronounce, and evoke the right associations. It must also be non-restrictive and free of trademarks. An available domain should also be checked.

According to Wheeler and Millman (2018), the right brand name is timeless, easy to pronounce and remember, concise in content and offers the opportunity to expand the brand. It must look good on paper, in email and in the logo. A correctly chosen name is the basic asset of a brand.

Keller (2007) argues that the brand name is the most important choice because it captures the main theme or key associations to the product or company. It should be taken into account that customers most often associate the brand name with the company's product or service.

Logo

Although the brand name has a major role in the image of the brand, the logo often plays a vital role in building brand equity. Above all, it is about brand awareness (Keller, 2007, 221). It is a distinctive feature that works in the context of the environment to observably evoke an image of the brand in the customer's mind. A logo is not a brand, but an abbreviation of a brand (Healey, 2008, 90). A logo must meet many requirements, but above all it must be unique, simple, and easy to remember. A logo is a symbol and acts as a visual shorthand. It represents an element of simple company identification, has a signaling function and is important for all communication activities. Creating a logo is a very demanding process that involves several members of the marketing staff. Specialists with an education in graphic design create a brand logo based on STP and set visual elements (colors) (Vysekalová *et al.*, 2020). Logos can be divided into purely text logos, or graphic logos with an abstract or real symbol. Adding a logo to all materials that go out is called branding (Podnikatel. cz, n.d.).

Two important elements associated with the logo influence the entire brand and its strength: the color and font of letters.

There is no universal guide to choosing colors. However, we know that the human brain is designed to remember colors, and marketers are aware of this and must consider the choice of colors in the visual representation of the brand. When choosing colors, physical aspects of color such as expressiveness, dynamic tension, or legibility must be taken into account. Furthermore, it is necessary to consider the effect of colors on people – the psychological side of colors (Healey, 2008, 92). Each color can be assigned a property that is created based on associations. The perception of colors varies geographically, but applies to western civilizations (Penčev, 2020):

- **Red** – energy, dominance, health, love, strength, timeliness, courage, protection
- **Orange** – comfort, fun, happiness, safety, warmth, abundance
- **Yellow** – creativity, self-confidence, joy, friendliness, sincerity, sharing
- **Green** – calm, balance, harmony, health, hope, nature, peace, rest, safety
- **Blue** – competence, efficiency, intelligence, rationality, safety, success, trust
- **Purple** – charm, authenticity, dignity, exclusivity, luxury, quality, sensuality, refinement, spirituality
- **Pink** – femininity, delicacy, charm, calmness
- **Brown** – nature, outdoors, reliability, ruggedness, support, safety
- **Black** – elegance, dignity, grandeur, power, attractiveness, wealth, maturity
- **White** – calmness, purity, innocence, sincerity, gentleness, transparency.

There are many hints and tips on how to choose brand colors with a view to evoking a specific emotion. The truth is that color perception is very specific and cannot have a general effect. It is important to perceive the overall context of brand visualization and to choose a color or colors accordingly. While a certain range of colors can serve to unify the brand identity, other colors can, on the contrary, distinguish a product or a product line (Wheeler and Millman, 2018, 154).

The font is used to achieve faster recognition of the brand. It is also possible to obtain associations through a well-known font, typical of a given brand. A customer or potential customer can recognize a brand even

without a logo (Coca Cola, McDonald, KFC). The font must both support the positioning of the brand and fit into the visual framework of the brand. There are hundreds of thousands to millions of fonts, and some graphic designers even design new fonts specifically for a given brand. Above all, the font must be clear and easy to read on a variety of media. When choosing or creating a font, graphic designers must also take into account specific letters and symbols for the brand's location (Wheeler and Millman, 2018, 158). Consistency in the use of brand fonts strengthens brand identity, while chaos destroys it. The choice of font is important for the longevity of the products and therefore the brand.

Symbol

Thanks to symbols, we remember and like brands, and recall them in a shopping situation. Symbols work with awareness. It is true that strong brands also have strong symbols. The right symbol is contrasting, easily recognized by the brain, carries a good emotion and describes the customer's need. A symbol is a kind of sign, which is a fact perceptible by the senses that points to something that is not perceptible in this way. A word referring to a concept or idea is probably the most common symbol. Symbols and signs can be distinguished according to several criteria. There are three types of symbols, depending on how the relationship between the sign and its meaning is formed: index, icon, and symbol as tradition or convention.

Slogan

A slogan is a short phrase, a sentence, that strives to capture the essence of the brand and thereby differentiate it from the competition (Wheeler and Millman, 2018, 28). Such a slogan is not easy to create, and should describe the USP (Unique Selling Proposition, i.e., a unique selling argument that expresses a unique feature of the product or brand that differentiates the product from the competition). Finding a USP and transforming it into a slogan takes a lot of effort. This is a strategic decision, because the slogan should complete brand associations, and the assumption is that it

will be used long-term and without changes. Slogans can be divided into five basic categories (Banyár, 2017, 33–34):

1. **Corporate slogan** – it has a long-term character and is linked to the company as such.
2. **Brand slogan** – refers to a specific brand and should be original, imaginative and reflect the focus of the brand.
3. **Product slogan/service slogan** – refers to the product or service and describes the main attributes of the product or service.
4. **Advertising slogan** – has a short-term nature and is used only in a specific advertising campaign.
5. **Event slogan** – is associated with a specific event such as an event, fair, exhibition, festival.

Brand representative

Sometimes it is possible to meet a representative of the brand, who is supposed to introduce the brand to customers or potential customers. This person should embody the company's values and affect the emotions of customers, giving the brand a human face and certain characteristics. It is a well-known personality, a business owner or an animated mascot.

Jingle

The jingle is a musical brand message that is catchy and has a chorus that instantly sticks in listeners' minds. The jingle can be regarded as a musical slogan that is not as easily transferable as other branding elements. Rather, the associations attached to the jingle relate to feelings, personalities, and other intangible qualities. They are a highly valued element in building brand awareness (Keller, 2007, 238–239).

Packaging (and labeling)

Packaging includes designing and creating product packaging. From the point of view of the company and consumers, the packaging must fulfill several goals at once (Keller, 2007, 239):

- identify the brand,
- communicate descriptive and persuasive information,
- facilitate the transport and protection of the product,
- help with household storage,
- assist in the consumption of the product.

From the point of view of brand building, the most important thing is to identify the brand through the packaging. The packaging should contain other brand elements that facilitate identification and at the same time create new ones that become typical of the brand.

URL

URLs (Uniform Resource Locators) are used to specify the location of a company's website. Digitalization is the trend these days, and having a website is essential. The main URL of brands is typically a direct or literal transcription of the brand name (Keller, 2007, 220-221). It is also typical to purchase the same web address with different domains to ensure that the brand is not misused for other purposes.

Brand archetypes

Archetypes represent clear patterns and traits of behavior that are consistent over time. These patterns and traits are reflected in fables, rumors, fairy tales and also in marketing. In simpler terms, they are characters with whom we share similar values, attitudes, opinions, and motivations. Archetypes resonate with the inner desires of customers. Brands strive for customer loyalty, and the use of archetypes is easy in this respect. The customer will be more loyal to the brand if he can identify with it (Jün, 2020).

Archetypal branding promotes brand distinctiveness. The archetype itself will help marketers uncover how a brand works and what makes a brand unique. It helps to find the tone of communication, i.e., the basic setting of clear and consistent communication with customers or potential customers. In order not to merge with the competition, it is important to differentiate the brand through communication. The strongest advantage of archetypal branding is the connection between the customers' needs and the product. The more the brand adapts its archetype to the target customer, the stronger the bond it creates. The advantage is that archetypes will help reveal customer behavior patterns (Jün, 2020).

There are a total of 12 archetypes that are used in marketing. Archetypes have a basis in analytical psychology and their roots go back to Greek mythology. Each archetype reflects a specific human desire (Jün, 2020):

1. **Carer** – caring for others
2. **Discoverer** – freedom
3. **Lover** – intimacy
4. **Clown** – enjoying life
5. **Hero** – mastery
6. **Magician** – power
7. **Rebel** – liberation
8. **Innocent** – safety
9. **Creator** – innovation
10. **Sage** – research
11. **Ruler** – to rule
12. **One of Us** – belonging.

A caregiver is a helper, saint, or parent whose mission is to help others. Demonstrating care with actions rather than empty words is also an important element. Brands with this archetype include Volvo and Pampers.

The purpose of an explorer is to find freedom, enjoy adventure and discover new things, places, and yourself. For example, National Geographic and Starbucks are typical representatives of the archetype yearning for freedom without borders and guards.

A lover seeks intimacy, a sense of belonging and friendly bonds. The goal is to build relationships, romantic, platonic, and friendly. Attractiveness is extremely important to the archetype. Brands of this archetype are Alfa Romeo or Chanel.

The clown loves to have fun and live life to the fullest. He lives by himself and has no problem making fun of himself in front of others. However, he is petty and insidious by nature. The representatives of this archetype are the brands Skittles and Old Spice.

The hero archetype represents someone who pursues goals head on. His character traits can make him seem arrogant at times. Brands of the hero archetype are Nike and BMW.

The Disney or Tesla brands are magicians, they are visionary and brimming with charisma. The line between good and evil is very thin in their case.

Rebels break social myths and conventions, are straightforward and self-confident. They tend to be loners who live on the fringes of society. The representatives of the archetype are Harley Davidson or MTV.

It may not be obvious at first impression, but the representatives of the innocent archetype are brands like Coca Cola or McDonald's. They are great optimists who desire happiness above all.

The greatest desire of creators is to create something new and unique. Not surprisingly, brands like Apple or YouTube fall into this archetype. The biggest fear is mediocrity.

A sage is basically useless in practical everyday life, because of their pursuit of knowledge and study. It is an archetype for the Google or TED brands.

A king, a boss, an aristocrat, or a monarch, that is how a ruler can be defined. The main goal is to be a role model. Brands of this archetype are Rolex, Hugo Boss and Louis Vuitton.

The last of the archetypes is one of us, independent and humble. He craves belonging and wants to fit in. IKEA or Volkswagen represent brands of this archetype.

Branding is not a static element and evolves and is updated over time. We call this process rebranding.

Methodology

This paper offers an analysis of brands and brand development. The authors performed an analysis of sources obtained through secondary marketing research by examining brand development and branding elements as indicated in the initial research in the introduction. As a part of our investigation, we used data from resources available in printed and electronic versions. We used logical methods – analysis, synthesis, comparison and deduction, as well as methods of content analysis in the theoretical part of the paper.

Results

Examples of brand development and their power

Positive examples where the value and power of the brand grows in the long term:

Apple:

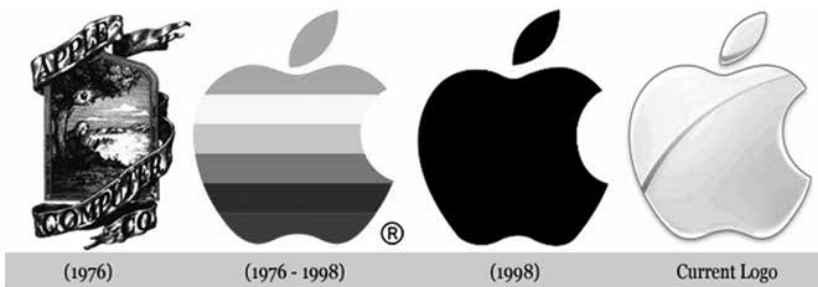


Figure 1.: Evolution of the Apple brand symbol

Source: <http://www.instantshift.com/2009/01/29/20-corporate-brand-logo-evolution/>

com/2009/01/29/20-corporate-brand-logo-evolution/

One of the largest consumer electronics and software companies, Apple is best known for products such as the Macintosh, iPod, and iPhone. Steve Jobs, Steve Wozniak and Ronald Wayne co-founded Apple in 1976 to sell

their handmade Apple I computer. They first pitched their product to HP but were rejected. HP still regrets it today.

The road to success was not easy for Apple, and Wayne sold his stake in the company for just \$800. After the launch of the Apple II in 1977, the power of the Apple brand began to grow, and the power and value the company has achieved since then are common knowledge.

The Apple II was successful mainly because it had color graphics. Great and simple design has always been Apple's USP (Unique Selling Proposition) and its logo is no exception. When Apple started, the logo was an elaborate picture of Isaac Newton sitting under a tree. This was designed by Jobs and Wayne with the inscription: "Newton... A mind forever wandering through strange seas of thought... Alone." It is one of the key factors why Apple had slow sales during this period.

The new logo was authored by Janoff, who stated in an interview that although he remembered the pun on "byte/bite" (Apple's slogan at the time: "Byte into an Apple"), he designed the logo as such to "prevent the apple from looking like a cherry tomato".

When Apple launched the new iMac in 1998, it changed its logo to a monochrome apple logo, almost identical to the rainbow logo. The current Apple logo is based on a nice gradient, chrome silver design. It is one of the most recognized brand symbols in the world today, and the shape is what identifies the company more than the color.

Airbnb:



*Figure 2.: Development the Airbnb brand
Source: <http://www.instantshift.com/2009/01/29/20-corporate-brand-logo-evolution/>*

Airbnb "launched" in 2008 as an online marketplace where people can either rent or list properties they own.

Airbnb was not too happy with the results and development of the given brand, and decided to start the rebranding process by creating a new brand identity and position.

The old logo was replaced with a new one. The brand font was changed and a custom color called “Rausch” was created. This color was named after the street where the Airbnb story began, which is one of the branding attributes. The new symbol “The Bélo” highlights four principles – People, Places, Love and Airbnb – united in a single “A” shape.

For Airbnb, rebranding meant defining a clear brand that is understandable, accessible and appealing to customers.

Examples where brand value and power have declined:

British Petroleum:



*Figure 3.: Rebranding of the BP brand
Source: <https://www.canny-creative.com/rebranding-failures-how-much-they-cost/>*

BP has had a very complicated time in recent decades.

In 2000, they replaced the strong logo that had been associated with their company for approximately 70 years with their current logo design, “Helios”, the name of the Greek sun god. The only element of the original British Petroleum logo that the new design retains is the color palette.

BP used to have a simple logo with a small footprint, and when the brand changed, the footprint became larger and the logo lost its timeless appeal. Timelessness is essential to creating an effective logo design.

The floor plan refers to the size that the logo occupies in the space where it is placed. As you can see, the original shield design takes up less space and would be less inconvenient to use in context.

Adding the BP to the top right corner of the “Helios” design increases the footprint of the design, meaning it takes up more space.

The Helios logo is meant to symbolize and represent the company’s green growth strategy by taking the form of the sun. But, looking at BP’s business, there is nothing green about oil extraction, and it seems as if BP is trying to hide the reality from people and mystify them. It would be better to refrain from this kind of connotation altogether.

After the uproar over BP’s strange choice of new logo really died down, the company caused global outrage with the Deepwater Horizon oil spill on April 20, 2010. BP is responsible for what is believed to be the largest offshore oil spill in the history of the oil industry. The Deepwater Horizon oil spill thrust BP back into the media spotlight for all the wrong reasons, even prompting Greenpeace to challenge people to come up with a “new logo design” for BP related to the spill.

BP is one of the world’s biggest companies and will probably never go back to their original brand identity.

The estimated cost of the design and rollout of the Helios logo was said to be \$211,000,000. The company spends up to \$125 million annually to improve its brand and marketing. It also invests large amounts annually in the Deepwater Horizon cleanup operation.

GAP:



*Figure 4.: Rebranding of the GAP brand
Source: <https://www.canny-creative.com/rebranding-failures-how-much-they-cost/>*

The original GAP logo, which served the brand for more than 20 years, disappeared without warning and was replaced by a new logo, consisting of the word GAP in bold and a square in the corner above the word, which was stretched from light blue to dark blue.

People did not welcome such changes at all, some even believing that another brand had copied the company to emulate the real GAP brand in the market.

Shortly after that, GAP had perhaps one of the fastest brand turnarounds of all time, when it reverted to its original design (just six days after unveiling the new logo).

This rebranding failure cost the company roughly \$100 million.

Discussion and conclusion

In this paper, the authors discussed the basic concepts associated with the brand, its elements, branding, and rebranding. Using selected examples, we showed the power of a well-managed brand and, conversely, the possible significant effects of mistakes in brand management on the entire company.

Brand is a phenomenon of today. Every person is a brand, a company and a product are a brand. However, government bodies, ministries and countries are also brands.

A brand is a persona, which has its own physical and psychological characteristics, as well as its interests and preferences. Last but not least, a brand assumes an attitude towards the world and the reality, as the brand as a person has its own opinions.

If we approach and understand the brand in this way, we will have a tool to help us build our power.

A brand, just like a person, develops with age, as a living organism that also goes through its life cycle. Building a brand is a continuous process, and branding (and also rebranding) is a tool to properly lead a brand.

Power is one of the basic values of a person. We wish to be strong. Let us also have and build strong brands for our strength and stability.

The fragmentation of resources between specialized companies and agencies was the main limiting factor in our research. There is no comprehensive and comprehensive resource that could be used to examine the issue at hand in detail.

For further research, we recommend using direct sources from companies (not only agencies) that have implemented a rebranding strategy and carry out a detailed analysis, synthesis and comparison for precise results from which more specific conclusions can be detected.

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BREND KAO MARKETINŠKI ALAT I KOMUNIKACIJSKI MOĆ

Sažetak

Brend i njegova izgradnja temeljna je zadaća svake tvrtke s obzirom na tržišnu ekonomiju i dinamiku emisije. Na svakom tržištu, gdje se ponuda susreće s potražnjom, postoji i konkurentsko okruženje, a brend je trenutno glavni adut svake tvrtke, reprezentativan i jasan simbol imidža tvrtke i proizvoda koje nudi na ciljnom tržištu. Potražnja na slobodnom tržištu ima svoje granice, a višak ponude nad potražnjom uzrokuje logičnu kanibalizaciju tržišta. Brend predstavlja poduzeće ili proizvode poduzeća te njihove karakteristike, prednosti ili, naprotiv, nedostatke i negativnosti. Upravo asocijacije vezane uz određenu tvrtku ili proizvod mogu biti glavni, ali ne i jedini poticaj za odluku kupca.

Uloga brenda je nezamjenjiva za poduzeće i ima direktan utjecaj na funkcioniranje poduzeća. Sve veće važnosti brenda nisu svjesne samo tvrtke i njihovi marketinški timovi, već prije svega stručna javnost iz koje proizlazi ogromna količina informacija o brendu i izgradnji brenda. U problematiku brendiranja ulazi nekoliko znanstvenih disciplina koje su same tek u razvoju. Dinamika problematike brenda i izgradnje brenda tako daje tvrtkama priliku da pronađu novi put i stvore snažan i popularan brend na ciljnom tržištu u konkurentskom okruženju.

Cilj našeg rada je pružiti cjelovit pregled područja i informacija koje su ključne za brend te njegovo pravilno upravljanje i izgradnju. Odabranim pozitivnim i negativnim primjerima pokazat ćemo snagu brenda u dugoročnom uspjehu cijele tvrtke.

Ključne riječi: brand, brand marketing, brand elementi, marketing, strategija

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CUSTOMER SERVICE SATISFACTION AND CULTURAL DIFFERENCES IN CUSTOMER SERVICE EXPECTATIONS IN SWITZERLAND

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Abstract

Customer satisfaction is a key driver of revenue. This paper investigates possible differences in customer service satisfaction and expectations between Swiss citizens and expatriates. The measurement of customer satisfaction and expectations is based on quantitative research in form of an online survey, where customers were asked to express opinions on statements via satisfaction scales, mapping various interactions with service providers in hospitality, finance, retail industry and analysis. The aim of the paper is to collect the said data as well as to analyze traditional customer satisfaction survey as secondary data and to offer recommendations for upgrading customer satisfaction in Switzerland, if any.

Key words: cultural differences, Switzerland, customer service, customer service satisfaction

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Introduction

Organizations use customer satisfaction as a prime business performance indicator and a weapon to achieve a sustainable competitive advantage in a dynamic environment (Suhaniya and Thusyanthy, 2016). According to Cronin et al. (2000), the term “satisfaction” refers to a positive, effective, and emotional response to a product or service. According to Shamsudin et al. (2015), satisfaction is an attitude associated with customer loyalty. Finally, according to Parker and Mathews (2001), “satisfaction can be viewed as an outcome of a consumption activity or experience; however, it is also represented as a process”.

Hunt (1982) reported that interest in customer satisfaction had increased to such an extent by the 1970s that over 500 studies were published about the topic. As this trend continued, Peterson and Wilson (1992) estimated the number of academic and trade articles on customer satisfaction to over 15,000.

Gustafsson, Johnson and Ross (2005) define customer satisfaction as a customer’s overall evaluation of the performance of an offering to date. Hayes (2008) defined the terms of customer satisfaction and perceptions of quality as the labels we use to summarize a set of observable actions related to the product or service. On the other hand, Hunt (1977) defined customer satisfaction as a process of evaluation that concluded that the experience was at least as good as it was supposed to be.

According to Yougdahl et al. (2003), “terms such as customer service, customer satisfaction, and delighting customers conjure mental pictures of attentive service providers meeting or exceeding our service needs, expectations, and desires”. Haralayya (2021) defines customer satisfaction as “the number of customers, or percentage of total customers, whose reported experience with a company, its products, or its services (ratings) exceeds specified satisfaction goals”. Also, according to Yi and Nataraajan (2018), “customer satisfaction is crucial to meeting the various needs of customers and companies”.

Ilias and Shamsudin (2020) discussed the impact of customer satisfaction and ways to achieve it in their paper, stating that “meeting the customers’ expectations is the first step towards customer satisfaction”, and

Suchánka and Králová (2018) found that “customer satisfaction has an impact on the performance and profitability of a company”.

The cited definitions indicate that customer service is a well-designed process whose final goal is to achieve quality of service and customer satisfaction.

In a multicultural country such as Switzerland, customers’ expectations and customer service are specific because the customers have backgrounds in different countries and cultures. Services and perceptions are different in each culture. In spite of the differences between perceptions, countries and cultures, generally we can agree that an inadequate customer service may be defined as a job that fails to meet customers’ expectations in terms of service quality, reaction time or overall consumer experience. The factors that influence customer service negatively include ineffective support personnel, lack of actual time assistance, or inability to understand the customers’ needs.

Cultural differences can create particularly bad impressions when you interact with a customer from a different part of the world, or even a subculture within your own country (Solomon, 2014).

Why does this happen? Culture is the set of assumptions, traditions, and values a community develops over time. Thus, members of a culture other than yours may interpret your behavior in ways that have not occurred to you, because of their community’s own assumptions, traditions, or values.

On the other hand, people should be careful when applying it as individuals because it does not always subscribe to their culture’s assumptions, norms, or values. Personal or family background can be a more powerful determinant of an individual’s values. One of my strongest recommendations in all areas of customer service is that you think about your customers as individuals rather than as groups. This core principle applies to cross-cultural communication, as well (Peterson, 2004).

While previous studies explored the effects of nationality on tourist behavior (e.g., Pizam and Sussmann, 1995), the role of the geographic origin of tourists in hospitality perceptions is still largely unknown. Outside of the hospitality context, existing evidence suggests that domestic and international tourists have different expectations and demands regarding service quality in various settings (Weiermair, 2000; Yuksel, 2004).

According to Steffen, Stettler and Huck (2020), “domestic and international tourists traveling in Switzerland place a similar importance on commercial hospitality, but domestic tourists are significantly less satisfied with their hospitality experiences in touristic service encounters.” Also, above authors argue that “in line with our hypothesis, domestic and international tourists seem to have different expectations and satisfaction ratings across the individual dimensions of the hospitality concept, with the largest differences in service providers’ openness toward other cultures”.

Johs, Henwood and Seaman (2007) researched the relationship between service predisposition and ethnic culture, that is, the relationships between specific cultural value dimensions and specific service attitudes, in an effort to answer the question if different teaching styles and locations have an effect on service disposition or ethnic culture. They found that “the biggest differences within the sample were those between the Scottish and Swiss sites, and most of these were concerned with SP components rather than value dimensions. European rather than Asian respondents were responsible for most of these differences, but there were some significant cultural differences between individuals of different nationalities.”

According to the European Customer Satisfaction Index⁸⁹ (ECSI), the UK had the highest customer satisfaction rate in Europe in 2017, as indicated in a report by the Customer Service Institute. The data also shows that countries such as Germany and the UK, which have lower levels of unemployment and higher GDP per capita, tend to have the best customer satisfaction scores. On the other hand, countries with higher unemployment rates and lower GDP – such as France, Italy and Spain – all score lower in customer satisfaction. As expected, products with substantial competition achieve the best results. The results are somewhat lower in services and retail, and they are the lowest in public and government agencies and institutions. The banking sector in Germany is rated the highest, whereas the banking sector in the UK is the least trusted. France and Spain have the lowest results, and results in Poland are also below average. It depends on priorities and expectations. There are some differences between countries: reliability scores the highest in Germany, simplicity scores the highest in

89 URL: <https://www.van-haafden.nl/customer-satisfaction/customer-satisfaction-models/61-the-european-customer-satisfaction-index>

the UK, and information scores the highest in Italy. Globally, food retail is the best rated sector, and telecommunications are the worst rated sector. As Switzerland has a traditional, process-oriented system that is predictable, stable and safe, and three culturally different regions, the purpose of this research was to determine what customer think of a service sector that is usually more people oriented.

This paper is organized into two primary segments. Research results are presented in the first segment, and coherent discussion and implications for future research and managerial practice are given in the second segment.

Research on cultural differences in customer service expectations in Switzerland

Following the literature review in the introduction, four research questions were proposed and tested in this study:

RQ1. Are there any differences between immigrants and Swiss citizens in terms of customer service expectations?

RQ2. Is there a difference between immigrants and Swiss citizens in terms of satisfaction with customer service in Switzerland?

RQ3. Is there a difference between expectations and satisfaction with customer service of newly arrived immigrants and those who have lived in Switzerland for 5+ years?

RQ4. Are there any differences in expectations and satisfaction with customer service between German, French and Italian speaking areas in Switzerland?

Instrument and research method

The survey was carried out in May 2022 among Swiss residents. A questionnaire is a useful method for data collection when the researchers focus on a large number of respondents (Horvat and Mioč 2012). Data collection by means of a questionnaire, according to Halma (2001), implies a process that allows the researcher to generalize the results from a sample

of the population. The collected data were analysed using the IBM SPSS Statistics 22.0. software package and MS Office Excel.

The respondents expressed their customer service satisfaction by ranking it on a Likert scale, where 1 stood for “very unsatisfied” and 5 stood for “very satisfied”. For the purposes of this study, the author created an on-line questionnaire consisting of questions on customer service satisfaction, customer service expectations, and the respondents’ relevant socio-demographic data.

Description of participants

There were 206 participants in the survey, of which 121 women and 85 men. The highest percentage of the respondents (up to 34%) belonged to the age group of between 35 and 45 years of age. Since the age group of between 45 and 54 years of age was the second most numerous in this survey, most of the sample (66%) falls within the age group of between 35 and 54 years of age. The age group of between 25 and 34 years of age represented 20.9% of the total sample. The vast majority of respondents (86.9%) thus falls within the age group of between 25 and 54 years of age.

Most of the respondents (73.8%) identified as immigrants, and 26.2 % identified as not immigrants, although just 13.1% of the total number of respondents were born and raised in Switzerland. That could mean that half of the respondents who did not consider themselves to be immigrants were not born in Switzerland, but became Swiss citizens, which is legally not possible before a minimum of ten consecutive years of living in Switzerland.

As mentioned before, the survey was conducted in Switzerland, but most of the respondents were from the French-speaking part of the country (58.3%), followed by the German-speaking part of Switzerland (38.3%), and only 3.4% were from the Italian-speaking region, which was further left out in the regional comparison.

Tables 1 and 2 show the structure of the sample according to the length of living in Switzerland and the region of origin.

Table 1. Structure of the sample according to the length of living in Switzerland

	Frequency	Percent	Cumulative Percent
0 – 4 years	59	28.6	28.6
5 – 9 years	59	28.6	57.3
10 years and more	61	29.6	86.9
I was born and raised in Switzerland	27	13.1	100.0
Total	206	100.0	

Source: Author's research

Table 2. Structure of the sample according to the region of origin

	Frequency	Percent	Valid Percent
Europe	80	38.8	52.6
Asia	9	4.4	5.9
North America	37	18.0	24.3
Africa	8	3.9	5.3
South America	16	7.8	10.5
Australia	2	1.0	1.3
Total	152	73.8	100.0
Missing System	54	26.2	
Total	206	100.0	

Source: Author's research

Interestingly, Table 3 shows that the respondents have quite a high level of education in general: 61.6% have a master's or doctoral degree.

Table 3. Highest degree or level of education

	Frequency	Percent	Cumulative Percent
Bachelor's Degree	65	31.6	31.6
High School Diploma	14	6.8	38.3
Master's Degree	96	46.6	85.0
Ph.D. or higher	31	15.0	100.0
Total	206	100.0	

Source: Author's research

Results

Average satisfaction rating is showed in Table 4. Respondents rated their satisfaction with customer service in five industries. The table below provides the average ratings for each of the industries, where a rating of 1 indicated the lowest level of satisfaction, and 5 the highest level of satisfaction.

Table 4. Average satisfaction

	N	Mean	Std. deviation
From your overall experience, how would you rate customer service in Switzerland?	206	3.54	1.010

Source: Author's research

Table 5. How would you rate customer service in the following industries?

	n	Min.	Max.	Mean	Std. deviation
Banking	206	1	5	3.55	1.137
Hospitality	206	1	5	3.50	1.090
Delivery services	206	1	5	3.34	1.028
Retail	206	1	5	3.32	1.074
Telecommunication	206	1	5	3.19	1.117

Source: Author's research

The data indicate that respondents are most satisfied with the services provided in the banking (3.55) and hospitality (3.5) industries, and compared to the five selected industries, they are the least satisfied with services in the telecommunications industry (3.19).

Table 6. What do you expect from customer services?

	Frequency	Percent
"People – first" attitude	42	20.4
Basic willingness to provide a service and improve the experience for the customer	1	.5
Customer centric caring attitude, w/o putting pressure to sell	1	.5
Effectiveness	1	.5
Friendliness	33	16.0
Knowledge	25	12.1
Patience	2	1.0
Proactivity to offer solutions	1	.5
Professionalism	74	35.9
Quickness	22	10.7
Swiss staff make you feel like your presence is an inconvenience	1	.5
Total	202	100.0

Source: Author's research

The data in Table 6 shows that professionalism (35.9%) is the trait the respondents expect the most from customer service, following a "people – first" attitude (20.4%).

The number of categories was lowered in further research.

Table 7. Chi-square test of independence

			Are you an immigrant?		Total	
			1 Yes	2 No		
v9_2	2.00 "People-first" attitude	N	31	11	42	
		%	73.8%	26.2%	100.0%	
	8.00 Friendliness	n	24	9	33	
		%	72.7%	27.3%	100.0%	
	9.00 Knowledge	n	20	5	25	
		%	80.0%	20.0%	100.0%	
	12.00 Professionalism	n	54	20	74	
		%	73.0%	27.0%	100.0%	
	13.00 Quickness	n	17	5	22	
		%	77.3%	22.7%	100.0%	
	Total		n	146	50	196
			%	74.5%	25.5%	100.0%

Source: Author's research

Referring to question number 1, “Is there any differences between immigrants and Swiss nationals in terms of customer service expectations?”, the results of the Chi-square test do not reveal a difference in customer expectations between immigrants and Swiss nationals ($\chi^2 = 0,643, p > 0,05$).

Table 8. Customer service rating in Switzerland

	Immigrants	n	Mean	Std. deviation	Std. error mean	t-test statistics
From your overall experience, how would you rate customer service in CH?	Yes	152	3.45	1.002	.081	t = 2.201; df = 204, p = 0.029

Source: Author's research

The results of the independent samples t-test indicate the existence of a statistically significant difference between the group of respondents who are immigrants and those who are not ($t = 2.201; df = 204, p < 0.05$). The established statistical significance confirmed that respondents who are not immigrants are statistically significantly more satisfied with customer

services in Switzerland (3.80) compared to those who are immigrants (3.45). These results answer the research question number 2.

Table 9. Industries

Rate customer service in the industries	Immigrant	n	Mean	Std. deviation	Std. error mean	t-test statistics
Hospitality	Yes	152	3.45	1.060	.086	t = 1.272; df = 204, p > 0.05
	No	54	3.67	1.166	.159	
Banking	Yes	152	3.46	1.109	.090	t = 1.876; df = 204, p > 0.05
	No	54	3.80	1.188	.162	
Retail	Yes	152	3.32	1.027	.083	t = 0.153; df = 204, p > 0.05
	No	54	3.30	1.207	.164	
Telecommunication	Yes	152	3.23	1.125	.091	t = 0.882; df = 204, p > 0.05
	No	54	3.07	1.096	.149	
Delivery services	Yes	152	3.31	1.031	.084	t = 0.830; df = 204, p > 0.05
	No	54	3.44	1.022	.139	

Source: Author's research

If the rating of satisfaction with customer services is compared by industry, the conducted t-test of independent samples points to an absence of statistically significant differences in the rating of satisfaction in any industry between the ratings of immigrants and those who are not immigrants ($p > 0.05$).

Table 10. Independent samples t-test (rate customer service in the industries and living in Switzerland)

Rate customer service in the industries	Living in CH	n	Mean	Std. deviation	Std. error mean	t-test statistics
Hospitality	< 5 years	59	3.59	1.100	.143	t = 1.253; df = 177, p > 0.05
	> 5 years	120	3.38	1.093	.100	
Banking	< 5 years	59	3.47	1.135	.148	t = 0.049; df = 177, p > 0.05
	> 5 years	120	3.48	1.130	.103	
Retail	< 5 years	59	3.47	1.104	.144	t = 1.406; df = 177, p > 0.05
	> 5 years	120	3.23	1.067	.097	
Telecommunication	< 5 years	59	3.37	1.272	.166	t = 1.365; df = 177, p > 0.05
	> 5 years	120	3.13	1.073	.098	
Delivery services	< 5 years	59	3.42	1.133	.147	t = 0.640; df = 177, p > 0.05
	> 5 years	120	3.31	1.011	.092	

Source: Author's research

If the rating of satisfaction with customer services by industry is compared with respect to the time the immigrant spent in Switzerland, the conducted t-test of independent samples indicates the absence of statistically significant differences in the rating of satisfaction in any industry if the ratings are compared with respect to those residing in Switzerland for five years and less and five years and more ($p > 0.05$). The results in Table 10 refer to research question number three.

Research question number 4 was: “Are there any differences in expectations and satisfaction with customer service between German, French and Italian speaking areas in Switzerland?” Due to the small number of respondents from the Italian-speaking area, the author only tested the differences between the German and French-speaking areas.

Table 11. Independent samples t-test (overall experience and geographical distribution)

	Part of Switzerland (geographical distribution of the languages)	n	Mean	Std. deviation	Std. error mean	t-test statistics
From your overall experience, how would you rate customer service in Switzerland?	French	120	3.30	1.001	.091	t = 4.472; df = 197, p < 0.001
	German	79	3.92	.903	.102	

Source: Author's research

The results of the independent samples t-test indicate the existence of a statistically significant difference between the group of respondents who are from the French-speaking and German-speaking areas of Switzerland ($t = 4.472$; $df = 197$, $p < 0.001$). The established statistical significance confirmed that respondents from the German-speaking area of Switzerland are statistically significantly more satisfied with customer services in Switzerland (3.92) compared to respondents from the French-speaking area (3.30). This part also refers to research question number 4.

Table 12. Independent samples t-test (rate customer service in the industries and parts of Switzerland (geographical distribution of the languages))

Rate customer service in the industries	Part of Switzerland (geographical distribution of the languages)	n	Mean	Std. deviation	Std. error mean	t-test statistics
Hospitality	French	120	3.39	1.117	.102	t = 1.858; df = 197, p > 0.05
	German	79	3.68	1.032	.116	
Banking	French	120	3.36	1.187	.108	t = 3.066; df = 197, p = 0.002
	German	79	3.84	.993	.112	
Retail	French	120	3.13	1.076	.098	t = 13.361; df = 197, p = 0.001
	German	79	3.65	1.013	.114	
Telecommunications	French	120	3.14	1.147	.105	t = 0.991; df = 197, p > 0.05
	German	79	3.30	1.102	.124	
Delivery services	French	120	3.27	1.067	.097	t = 1.513; df = 197, p > 0.05
	German	79	3.49	.985	.111	

Source: Author's research

If the answers provided by French and German-speaking respondents are compared with regard to the evaluation of customer service satisfaction in five industries, it is obvious that there is a statistically significant difference in two industries. An analysis of the satisfaction with the service of the banking industry shows that respondents from the German-speaking area (3.84) are statistically significantly more satisfied with the service ($t = 3.066$; $df = 197$, $p = 0.002$) than respondents from the French-speaking area (3.36). A statistically significant difference was also detected with regard to the service industry ($t = 13.361$; $df = 197$, $p = 0.001$), where again the German respondents (3.65) report a statistically significantly higher satisfaction rating than the French (3.13). In the comparison of ratings for the hospitality, telecommunications and delivery service industries, no statistically significant differences were found between the German and French parts of Switzerland ($p > 0.05$).

Table 13. Industries and origin

	Born	N	Mean Rank	Sum of Ranks
Hospitality	0 – 35	179	100.24	17942.50
	I was born and raised in Switzerland	27	125.13	3378.50
	Total	206		
Banking	0 – 35	179	99.77	17858.50
	I was born and raised in Switzerland	27	128.24	3462.50
	Total	206		
Retail	0 – 35	179	103.66	18554.50
	I was born and raised in Switzerland	27	102.46	2766.50
	Total	206		
Telecommunications	0 – 35	179	105.04	18802.50
	I was born and raised in Switzerland	27	93.28	2518.50
	Total	206		
Delivery services	0 – 35	179	104.05	18625.50
	I was born and raised in Switzerland	27	99.83	2695.50
	Total	206		

Source: Author's research

Table 14. ANOVA test

	Hospitality	Banking	Retail	Telecommunications	Delivery services
Mann-Whitney U	1832.500	1748.500	2388.500	2140.500	2317.500
Wilcoxon W	17942.500	17858.500	2766.500	2518.500	2695.500
Z	-2.126	-2.401	-.101	-.993	-.361
Asymp. Sig. (2-tailed)	.034	.016	.920	.320	.718

Source: Author's research

Additionally, an ANOVA test was performed on all satisfaction variables with regard to age and education, but no difference was found, and no difference was found between men and women with regard to all variables of satisfaction (t-test).

Conclusion, limitations, and suggestion for future research

The paper analyzes customer satisfaction and expectations, and possible differences in customer service satisfaction and expectations between Swiss citizens and immigrants.

Institutions in Switzerland need data, i.e., feedback from customers, to upgrade customer satisfaction, understand the cultural differences, and ensure a good customer service. The role and importance of the collected data lies in the potential for their use by institutions to upgrade their services. The research in this paper highlights the importance of customers service improvement, and the results show that the institutions in Switzerland should lay the biggest emphasis on professionalism and the “people – first” attitude. According to Feng et al. (2019), to improve customer satisfaction, institutions need to be more focused on the psychological elements of the customers, and on excellent leadership. Also, according to Oh (1999), “companies’ efforts for improving service quality and customer satisfaction should be conducted holistically including value enhancement”.

The study has several limitations. The lack of literature regarding customer satisfaction in Switzerland is the first limitation, and the absence of research in the subject area in relation to cultural differences is the second limitation, since it is a factor that significantly defines the way to achieve quality of customer service. Limited access to the data, and the small sample size and small number of the sectors are also limiting factors.

One of the suggestions for future research is to perform similar research in another location (countries in Europe or countries in other continents), and compare it with results of this research (with Switzerland). New comparisons are also a possibility, for example, between the self-evaluation by customer service employees and evaluation by customers, or between the situation when the customer needs a service from an institution and the paid service that the customer wants.

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ZADOVOLJSTVO KORISNIČKIH USLUGA I KULTUROLOŠKE RAZLIKE U OČEKIVANJIMA KORISNIČKIH USLUGA U ŠVICARSKOJ

Sažetak

Zadovoljstvo korisnika ključna je dimenzija koja pokreće prihod. Svrha je istraživanja je ispitati postoje li razlike u zadovoljstvu korisničkih usluga i očekivanjima između građana koji su Švicarci i iseljenici. Mjerenje zadovoljstva i očekivanja korisnika temelji se na kvantitativnom istraživanju u obliku online ankete u kojoj se od korisnika traži da izrazi mišljenje o izjavama putem ljestvica zadovoljstva, mapirajući različite interakcije s pružateljima usluga u ugostiteljstvu, financijama, maloprodaji i analizama. Cilj rada je prikupiti navedene podatke kao i analizirati istraživanja zadovoljstva kupaca kao sekundarne podatke te ponuditi preporuke za nadogradnju zadovoljstva kupaca u Švicarskoj, ako postoje.

Ključne riječi: kulturološke razlike, Švicarska, služba za korisnike, zadovoljstvo usluga za korisnike

**POWER IN CULTURAL
AND ARTISTIC SPACE AND
PRODUCTION**

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THE ROLE OF POPULAR SONGS IN CONFIRMING CROATIAN NATIONAL IDENTITY

Scientific paper
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Abstract

The experiential, emotional reception of a piece of music depends on a number of factors. Considering this complex phenomenon from a subjective aspect, the individual experience of a particular piece of music is influenced by the time and place of listening, as well as by physical and social factors, structural elements of the music, and other qualitative elements. Popular music, due to its distinctive features, which are manifested through a simpler melodic and rhythmic structure, elicits an intense emotional response from the listener even at the first listening. The textual element plays a significant role in this, as it can completely change the affective valence of the piece of music. Based on the musical analysis of nine popular songs from the Homeland War, the most intensive period in Croatian history in social and political terms, the paper discusses all the experiential elements that influenced the emotional reception and the popularity of these songs. The impact of lyrics on the affective dimension of the acceptance of the songs is highlighted, as is the setting in which they were composed and the significance they had for the formation of national identity.

Keywords: emotions, national identity, popular music

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Introduction

Listening to music is a multidimensional experience that raises numerous questions for researchers of various profiles (Škojo, 2020, Škojo, 2021). From the point of view of experiencing a piece of music, emotional reception, and emotions induction, for more than half a century, efforts have been made to shed light on the numerous influences on the basis of which a particular musical performance is colored by a certain emotion of a specific intensity with respect to the different listener and context.

The basic characteristics of emotions in listeners refer to physiological changes, subjective experience, and emotional expression (Dobrota and Reić Ercegovac, 2012). Juslin and Västfjäll (2008) list factors that influence the subjective experience of emotions in music. These are physical factors (time and place of listening), social factors (listening alone or in company) and other elements that influence the performance (familiarity with the piece, level of practice, etc.). Bogunović and Popović Mladenović (2014) have established the integrated theoretical framework referred to as the BRECVEM (*Brain stem reflexes, Evaluative conditioning, Emotional contagion, Visual imagery, Episodic memory and Musical expectancy*), which highlights the unavoidable factor of structural elements of music that have a significant impact on the intensity of experienced emotions. Scherer (1993) argues that emotions in music, in addition to the cognitive processing of the piece of music, imply the following components: the subjective experience of the listener, an expressive component, a physiological component, which refers to the activation of the sympathetic nervous system and the state of excitement, but also the motivation of the listener or the tendency to act. Individuality in the emotional experience of music and its connection with a personal, subjective experience is evident from all the statements of the researchers named above. Lazarus and Smith (1988) explain subjectivity in emotional musical experience with the biological and mental characteristics of each individual, their unique emotional situations' appraisal history. Gabrielsson (2002) points out that, apart from numerous subjective factors, such as musical taste, the listener's personality and musical abilities, the emotional experience of a piece of music strongly depends on social elements, as well as on the wider context and the time and moment in which the listening takes place. Sloboda and Juslin (2001) indicate extrinsic and intrinsic sources of emotions in

music. While extrinsic emotional meaning is subjective and is reflected in the associations with which an individual connects external personal experiences with certain music, intrinsic emotional meaning is based on perceived musical features and/or is adopted through musical education.

It is clear that the relationship between music and the listener when inducing emotions in music can be viewed on the one hand through the musical structural aspect, and on the other hand through the aspect of the listener, his unique personality and listening experience, as well as through musical preferences and taste and numerous factors that influence a specific musical experience (Figure 1).

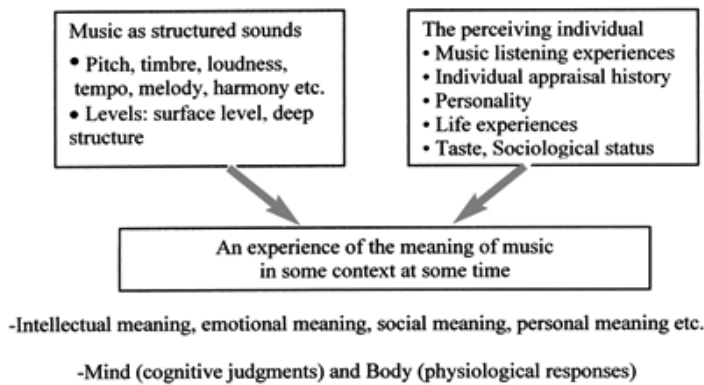


Figure 1. The interaction between music and a listener in evoking meaning. (Kallinen and Ravaja, 2006:193)

Looking at the relationship between popular music and listeners from the aspect of musical characteristics, it is clear that popular music, from a structural aspect, is characterized by a simple diatonic melody, which is a potentially rich source of emotional meaning (Warner, 2003). The prominent regularity, along with an indispensable tempo in popular music, is an important determinant for the emotional effect on the listener.

Study results clearly indicate that tempo and tonality have the greatest influence on the listener, whereby music in the major, with a fast tempo, was described as cheerful, and music with a slow tempo and in the minor

as emotional (Vink, 2001). Based on research into the influence of song lyrics on emotions, it was concluded that, in a combination of lyrics and music, the lyrics of a song have a greater ability to direct emotions in the listener than the melody (Stratton and Zalanowski 1994). Since popular music is strophic in form and characterized by short musical phrases of regular length, “catchiness” and affectivity is usually achieved by a melodic or rhythmic motif that is memorable and carried throughout the song (Burns, 1987). Structural simplicity and musical repetitiveness are important features of popular music for experiencing emotions because this type of music relies on repeated exposure through media channels, and is essential for the listener to be drawn into the song within the first 7-20 seconds (Warner, 2003).

Apart from the musical aspect, the context in which the songs were created and the strength of patriotic emotions and national identity have the strongest influence on the emotional reception and experience of popular music created during the Homeland War.

Popular songs during the Homeland War

The defensive Homeland War, as a part of the formation of the independent Republic of Croatia, is one of the key events in the history of the Croatian nation. A wide range of symbols, local, regional, but also those belonging specific social groups, which were created in the war environment to confirm and strengthen the national identity, were deeply woven into the emotions and the national consciousness of the generations that witnessed the Homeland War, as well as those that came years after it. Music has always played a major role in awakening national consciousness. Depending on the historical context, it carried individual musical features and emotions that confirmed strength, greatness, and pride, and programs that gave the music the necessary content specification. While no notable musical achievements occurred in the field of serious, artistic music during the Homeland War, the musical legacy in the field of popular music is considerable (Degl’Ivellio, 2016). Popular music created during the Homeland War reflected all the social and political circumstances in Croatia at that time. The Homeland War spawned more than a hundred popular songs, a wide range of different genres of popular music, from

tamburitza music to rock (Pettan, 1998). The author has divided the war-themed songs recorded during the Homeland War into official ones, characterized by high technical quality, as well as high musical performance, and lyrics supported by the Croatian Government and broadcast through state media, and alternative, lower quality ones. Regardless of the musical quality, all popular songs have in common an emotional impact on the listener and the awakening of patriotic feelings. The soldiers found in the songs the feelings that encouraged them and raised their morale, while each individual civilian, considering his personal mental context and the specific war moment marked by either the success or failure of the army, found in the popular songs the necessary emotions of strength and pride.

A strong emotional aspect, apart from the music, can be seen in the lyrics of the songs written during the Homeland War. Various motifs and symbols are visible in the lyrics of the songs, which enable easier identification of the listener with a particular song and a more successful emotional match between the music and the lyrics. The lyrics of the songs carry strong messages of peace addressed to the international community, as well as numerous other messages with the embedded elements of symbolism used by the authors to reach their listeners.

The research

Nine official popular songs from the period of the Homeland War were analyzed for the purposes of this paper to determine the structural elements of popular songs that had an important impact on awakening national consciousness among listeners (Table 1).

Table 1. List of songs and their messages

Number	Name of the song	Content of the lyrics – message
1.	Ne dirajte mi ravnicu	Longing and hope for return Anti-war song
2.	Stop the War in Croatia	The effort of Croats for European integration and European values Anti-war song
3.	Anica, Kninska kraljica	Opposing war with violence
4.	Moja domovina	Love for the homeland, fear for it, its beauty Anti-war song
5.	Bože čuvaj Hrvatsku	Identification of Croats and religion Anti-war song
6.	Gospodine generale	The heroism of Croats and their love for their homeland Anti-war song
7.	Lupi petama, reci sve za Hrvatsku	Longing for the end of the war Anti-war song
8.	Mi smo garda Hrvatska	Glorifying the courage and heroism of Croatian soldiers
9.	Od stoljeća sedmog	Centuries-long efforts of Croats to create their own state Anti-war song

The results

Song no. 1.

The song *Ne dirajte mi ravnicu* (original name *Ja ću se vratiti*), written in 1989, was originally about a Croatian emigrant from America, who dreams of returning to his native land. The song was broadcast for the first time on Radio Osijek, after a report about the persecution of the inhabitants of Aljmaš (August 1, 1991), and in the new context, as a symbol of longing and hope for return, it became one of the most popular songs of the Homeland War. The same song was covered by the tamburitza ensemble Zlatni dukati, with a video featuring the prominent Slavonian actor Fabijan Šovagović. Although the text of the song is regionally focused

(fields, plains, tamburitza), it was accepted throughout Croatia, as well as in the diaspora. Regional identification in music is reflected through the performing ensemble – the tamburitza – a traditional Slavonian instrument. This contributed greatly to the success of the song, because at the beginning of the 90s, the tamburitza was intensively positioned as a traditional Croatian musical instrument, which also resulted in strong popularization of tamburitza music. Among the covers of the same song, two covers from 1992 stand out: a cover with guitar accompaniment, with the verse *Ne dirajte mi gromače...* (Punta, the island of Krk) and an a cappella cover by the klapa *Burin* (Cres) (Bonifačić, 1983: 202). The emotional aspect is related to the text of the song (Table 2).

Table 2. Lyrics of the song *Ne dirajte mi ravnicu*

Name of the song	Lyrics
Ne dirajte mi ravnicu (1 349 681 YouTube views) https://www.youtube.com/watch?v=tGMIs13fJSk	Večeras me, dobri ljudi, nemojte ništa pitati, neka suze tiho teku pa će manje boljeti. Ne dirajte mi večeras uspomenu u meni, ne dirajte mi ravnicu, jer ja ću se vratiti. Još u sebi čujem majku kako tužno govori: “kad se jednom vratiš, sine, ja ću te čekati.” Ne dirajte mi večeras uspomenu u meni, ne dirajte mi ravnicu, jer ja ću se vratiti. Mene zovu moja polja, mene zovu tambure, prije nego sklopim oči, da još jednom vidim sve. Ne dirajte mi večeras uspomenu u meni, ne dirajte mi ravnicu, jer ja ću se vratiti.

The musical parameters that support the nostalgic emotional coloration include the singing melodic line, simple structure, and the diatonic hexachordal scope in which gradual shifts prevail. The rhythmic component reflects the ballad character of the song, without resorting to notes of shorter values. The harmonic structure rests on basic tonality functions with the occasional occurrence of minor chords of the second and fourth degree. Its expansion is manifested by the use of the dominant of the sixth degree (D/VI) and the major triad on the lowered sixth degree. Easier and faster “memorization” of the song is made possible by the simplicity of the formal structure (stanza-chorus).

Song no. 2

The song *Stop the War in Croatia* was written in 1991, in the midst of war suffering in Croatia. It was written in English, which made it possible to spread the image of the war throughout the world. The song calls on the international public to end the war suffering in Croatia. It talks about the Croats' aspiration for European integration and European values (democracy and peace) (Table 3).

Table 3. Lyrics of the song Stop the War in Croatia

Name of the song	Lyrics
<p>Stop The War In Croatia</p> <p>(282 318 YouTube views)</p> <p>https://www.youtube.com/watch?v=z_Bb_4PUe8g&list=RDz_Bb_4PUe8g&start_radio=1</p>	<p>Stop the war in the name of love, stop the war in the name of God, stop the war in the name of children, stop the war in Croatia.</p> <p>We want to share the European dream, we want democracy and peace, let Croatia be one of Europe stars, Europe you can stop the war.</p>

In addition to the singer Tomislav Ivčić, the song is performed by the children's choir (*Zagrebački mališani*), whose singing in the chorus (stop the war...) emphasizes the desire for peace in the name of love, God, and children. By including children in the song and the music video, an effort was made to further sensitize the international community (achieve a greater emotional effect on the listeners). In the video, images of the beauty and cultural wealth of Croatia alternate with depictions of war destruction and human suffering.

The structure of the song is simple (chorus – stanza – chorus). The emotional musical impression lies primarily in the strong message of the song and the repetition of the message and the call for an end to the war. The melodic line is more developed, and the gradual upward movement of the melody, contrasted by jumps in the downward direction, is particularly evident in the chorus. In terms of rhythm, the combination of an eighth note and two sixteenth notes (ta-te-fe) stands out, forming a recognizable melodic-rhythmic motif with the gradual upward movement of the melody, which dominates the entire chorus. The harmonic structure relies for

the most part on tonic, subdominant and dominant degrees of the scale, with occasional chords of other degrees. Given its concept, character, lyrics and music, this song is one of the more successful pieces of popular music created during the Homeland War.

Song no. 3.

The song *Anica – kninska kraljica*, by Marko Perković Thompson, is a completely different example of a song from the Homeland War period in terms of character, content, and genre. Thompson (nicknamed after the American machine gun he used in the war) drew media attention to himself with his first song, *Bojna Čavoglave*, released in 1991 by Croatia Records. The song *Anica – kninska kraljica*, released in 1994, tells the story of the girl Anica, who was imprisoned in Knin (Table 4).

Table 4. Lyrics of the song Anica, Kninska kraljica

Name of the song	Lyrics
Anica, Kninska kraljica (6 475 955 YouTube views) https://www.youtube.com/watch?v=U2dS3XKJQqU	Zbog Anice i bokala vina, zapalit ću Krajinu do Knina. Zapalit ću dva, tri, srpska štaba, da ja nisam dolazio džaba. Ej, Anice kninska kraljice, ej, Anice kninska kraljice, ej, Anice kninska kraljice. Zbog Anice i bokala vina, zapalit ću Krajinu do Knina. Ej, Hrvati sjetimo se Knina, hrvatskoga kralja Zvonimira. Ej, Anice kninska kraljice, ej, Anice kninska kraljice, ej, Anice kninska kraljice.

Thompson's songs appealed to the wider public (including this song) through his personality, lyrics, and music. The song achieved a great success, which it partially owed to the fact that the singer was himself a participant in the Homeland War, earning him great sympathy from the society in general that set him apart from professional musicians. Using the media, the official Croatian politics tended to support songs that conveyed

messages of peace, forgiveness, encouragement, and love for the homeland, invoking God's help, but also offering resistance, without openly calling for hatred. This song by Thompson did not fit these parameters. Its discourse, which openly supports violence, was not acceptable to official politics. Although HTV (Croatian national television) supported the production of patriotic songs, in case of this song by Thompson, Baker (2010, 40) states that due to the radical nature of the text (the burning of “two, three Serbian headquarters”), HTV did not record the video.

The analysis of musical features points to the simplicity of the melodic line, which is reduced to a diatonic pentachord sequence. The movement of the melody is conditioned by a smaller scope, with prevalingly gradual interval shifts. In the rhythmic structure, the occasional presence of syncopation and dotted notes rhythm stands out. Staccato, as an articulating element, serves to emphasize the lyrics. The harmonic backbone consists of tonic and dominant harmony, which is occasionally preceded by its dominant (D/D). By applying the secondary dominant, the author is close to harmonization based on traditional foundations (ending D/D – D). In this popular song, the two-part formal concept (stanza-chorus) also comes to the fore.

Through elements that reflect affection for traditional values Thompson reached a wider mass of listeners. The text refers to the historical significance of the city of Knin (Zvonimir's town). The opening instrumental section is performed by an instrument that imitates a traditional musical instrument. The two-part concept of the opening section, with the occasional shift in the interval of the seconds, as well as the pedal tone in the lower section, also refers to the traditional musical heritage.



Picture 1. The opening instrumental section of the song
Anica, Kninska kraljica

Creating the feeling of community and connection (in large masses) is manifested within the stanza in the singing tutti passages, which repeat the melody almost identically to the one delivered by the soloist. In this

song by Thompson, as in some other examples, it is noticeable that traditional musical elements merge with an accentuated rock expression.

Song no. 4.

Songs performed by groups of prominent musicians, better known as “band aids”, were also created during the Homeland War. These groups were brought together by profession, regional affiliation, place of residence or genre (*Domovino najdraža* – Franciscan band aid, *Ritam ljubavi* – Croatian funk forces, *Krešimirov grade Hrvatski* – Šibenik band aid, *Ponosna Hrvatska* – Tambura band aid). *Moja Domovina*, written by Zrinko Tutić and Rajko Dujmić in 1991, was certainly one of the most remarkable patriotic songs created during the Homeland War. The song was sung by the Croatian band aid, comprising almost 150 prominent Croatian musicians. It was extremely important for raising morale during the difficult moments of the war, and even afterwards the war it has remained a widely loved song. The lyrics of the song talk about love for the homeland, fear for it, but also about its beauty. They convey the message of unity and hope for a better tomorrow (Table 5).

Table 5. Lyrics of the song Moja domovina

Name of the song	Lyrics
Moja domovina (2 227 368 YouTube views) https://www.youtube.com/watch?v=t3cBglAzvXw	Svakog dana mislim na tebe, slušam vijesti, brojim korake, nemir je u srcima, a ljubav u nama, ima samo jedna istina. Svaka zvijezda sija za tebe, kamen puca, pjesma putuje, tisuću generacija noćas ne spava, cijeli svijet je sada sa nama! Moja domovina, moja domovina! Ima snagu zlatnog žita, ima oči boje mora, moja zemlja Hrvatska. Vratit ću se, moram doći, tu je moj dom, moje sunce, moje nebo! Novi dan se budi, kao sreća osvaja, ti si tu, sa nama.

Moja domovina belongs to the most successful achievements in the field of popular music. The performers’ approach sets this song apart from other similar musical creations and gives it an additional emotional strength and charge. From a structural point of view, the piece is composed of a more developed melodic line, especially in the stanza part.

The formal structure consists of two parts (stanza-chorus), and after the second stanza and chorus, a new (third) part appears, followed by the chorus again. Along with the basic G major tonality, there is also a parallel E minor (third part), followed by a modulation into A major. In harmonization, along with the main degrees, there are a secondary second and fourth degree.

Song no. 5

The oeuvre of patriotic songs includes works whose texts also reflect religious themes (*O sveti Vlaha – Tereza Kesovija, Domovina, Bog i Hrvati – Tomislav Brajša, Molitva za Hrvatsku – Alen Slavica*). Patriotic songs featuring God, Holy Mary, saints, and generally religious themes highlight the tradition of Christianity, which is deeply rooted in the identity of the Croatian people. Sometimes these texts also represented the identification of Croatian patriotism with religion. The most prominent song of this type is the song *Bože čuvaj Hrvatsku* (Table 6).

Table 6. Lyrics of the song *Bože čuvaj Hrvatsku*

Name of the song	Lyrics
<p>Bože čuvaj Hrvatsku (519 277 YouTube views) https://www.youtube.com/watch?v=jGwQmRktlyA</p>	<p>Bože, čuvaj Hrvatsku, moj dragi dom, ljude koji blaguju, pri oltaru Tvom!</p> <p>Nek se sliju molitve, sve u jedan glas, čuvaj ovo sveto tle, blagoslovi nas!</p> <p>Ako treba, Gospode, evo, primi zavjet moj, uzmi život od mene pa ga podaj njoj.</p> <p>I u dobru i u zlu, budi s nama, budi s njom, Bože, čuvaj Hrvatsku, moj dragi dom!</p>

This 1991 song is written and performed by Đani Maršan. The range of the melody moves within the framework of the complete major diatonic scale. Gradual interval shifts dominate at the same time. The figure

composed of a dotted quarter note, which is equally represented in the stanza and the chorus, stands out on the rhythmic level.

I. strofa: Bo-že ču-vaj Hr-vat-sku, moj dra-gi dom, lju-de ko ji bla-gu-ju pri ol-ta-nu Tvom

Refren: A - ko tre-ba Go-spo-de, e - vo pri-mi za-vjet moj: u - zmi ži-vot od me-ne pa ga po-daj njoj.

Picture 2. Melody of the song *Bože čuvaj Hrvatsku*

The harmonic structure rests on fundamental harmonic functions. The formal structure is a two-part structure (stanza-chorus).

The song *Bože čuvaj Hrvatsku* and other songs that resembled it in terms of their themes reflected unity, developed patriotism, and encouraged resistance to the enemy in times of crisis for Croatian survival. The topic of the song is the most powerful factor in the song that affects the emotional experience of the individual.

Song no. 6

Songs addressed to enemy soldiers were also a part of the opus of popular patriotic songs from the Homeland War (*Bojna Čavoglave* – Thompson, *Čedo majmune* – Mario Pešo, *Vrijeme je za grom* – Opća opasnost). The song *Gospodine generale* by Vladimir Kočiš Zec is an anti-war song, addressed to the general of the enemy's army, who symbolizes the occupying army. Created in 1991, it talks about the heroism of the Croats and their love for their homeland, and in particular emphasizes the importance of the struggle of the city of Vukovar in the Homeland War.

Table 7. Lyrics of the song *Gospodine generale*

Name of the song	Lyrics
Gospodine generale (762 713 YouTube views) https://www.youtube.com/watch?v=DQmPnKNZeZ4	Gospodine generale, visoko gore, na katedrali, samo tišina, satovi su stali, u mraku vidim, bojite se sjene, ne može se lako ubiti vrijeme. Gospodine generale, dječak pred crkvom ostavlja svatove, mora se krenut u vaše ratove, oči mu pune zvjezdanog praha, al' mirno korača, srca bez straha. Gospodine generale! Ako sa vjetrom, neki zvuk vas budi, to kuca srce hrabrih ljudi, i reći ću vam samo još jednu stvar: "zapamtite Vukovar!" Gospodine generale, kad prođe tuga i vjetra jecanje, vodit ću sina opet na pecanje, djeci ću pričat beskrajne priče, sve livade opet zelene bit će.

In addition to the gradual movement, the melodic line is marked by more frequent interval jumps and pauses. The performance of the triplet (at the beginning of the chorus: *Gospodine generale*) rhythmically emphasizes the drama of the chorus.



Picture 3. Triplet at the beginning of the chorus
of the song *Gospodine generale*

The fundamentals of function (T, S and D) prevail on the harmonic level. The song is structured in two parts (stanza-chorus).

Conveying the message that the war will end and peace will come again, the song was of great importance for raising the morale of all the martyred and exiled people, which is its greatest emotional strength.

Song no. 7

The song *Lupi petama, reci sve za Hrvatsku*, by Jasenko Houra, belongs to a completely different musical genre. It was created in 1993 and recorded by the rock band Prljavo kazalište from Zagreb (Table 8).

Table 8. Lyrics of the song *Lupi petama, reci sve za Hrvatsku*

Name of the song	Lyrics
Lupi petama, reci sve za Hrvatsku (1 993 894 YouTube views) https://www.youtube.com/watch?v=zymMHWz6r88	Jednog dana, kada ovaj rat se završi, jedva čekam, prijatelji, sve vas da zagrlim, ovako sjedim sam pa vam ponekad otpjevam. Lupi petama, reci evo sve za Hrvatsku, poljubim zastavu i pustim suzu, neku iskrenu, o Bože čuvaj ti, naše golubove i sirotinju, jer bogati se i onako za sebe pobrinu. Ima dana, kada ne znam šta ću sa sobom, jer ne vesele mene, bez vas, utakmice nedjeljom, a kada padne, evo noć, dozivam vas imenom, vas su prekrili zastavom i mahovinom. A ja sjedim sam pa ponekad za vas otpjevam. Jednog dana, kada ovaj rat se završi, ma jedva čekam, prijatelji, sve vas da zagrlim, o Bože čuvaj ti, naše golubove i sirotinju, jer bogati se i onako za sebe pobrinu.

Many musicians tried to support their homeland in the war and raise the morale in the time of crisis, including rock musicians (*Hrvatska mora pobijediti* – Psihomodo Pop, *Croatia in Flames* – Montaž Stroj / Boxer, *Bili cvitak* – Jura Stublić, *Kekec je slobodan, red je na nas* – Parni Valjak, *Moj dom* – Neno Belan, Dino Dvornik, Gibonni, Ban & Co).

The movement of the melody of the song *Lupi petama, reci sve za Hrvatsku* is characterized by more frequent interval jumps. There are no characteristic patterns on the rhythmic level. The harmonic structure relies predominantly on the functions of the tonic, subdominant and dominant degrees

of the scale. The two-part formal concept (stanza-chorus) is close in terms of content (a – a’). After the 1st chorus, a new (b) thematic part appears.

The content of the song *Lupi petama, reci sve za Hrvatsku* belongs to a series of many anti-war patriotic songs. The song talks about the longing for the end of the war and the people who will not return from the war.

Song no. 8

Songs dedicated to Croatian veterans were performed by many musicians: Zdenka Vučković – *Gardisti*, Đuka Čaić – *Hrvatine*, Ivo Fabijan, Ljerka Palatinuš and Vera Svoboda – *Kreni gardo* etc. The song *Mi smo garda hrvatska* glorifies the courage and heroism of Croatian soldiers, and their selfless dedication to the defense of the homeland. The song was significant for raising the morale and encouraging the fight “for our freedom, justice and peace”. It was created in 1991, and Mladen Kvesić is its author and performer (Table 9).

Table 9. Lyrics of the song *Mi smo garda hrvatska*

Name of the song	Lyrics
<p>Mi smo garda hrvatska (371 226 YouTube views) https://www.youtube.com/watch?v=yasqlek_3hs</p>	<p>Mi smo garda hrvatska, srca su nam junačka, nikog' se ne bojimo, zemlju svoju volimo.</p> <p>Postrojmo se, braćo, svi u jedan vod, neka dušman čuje pobjednički zov, u odlučujući boj, krenuli smo mi, za slobodu našu, pravедnost i mir.</p> <p>Nek' svaki Hrvat pedalj zemlje brani, ne bojte se, ljudi, Bog je na našoj strani, nek' svaki junak života svog ne žali, za našu Hrvatsku mnogi su ga dali.</p>

The song has a simple musical structure. The melody mainly relies on gradual shifts. The measure is 6/8, which gives off the character of a march with a more mobile tempo and instrumentation. The harmonic structure rests on the main harmonic functions. The two-part formal concept of the poem is formed by the chorus-stanza division. The marching character of

the song *Mi smo garda Hrvatska* is the reason why it has maintained its popularity and is still often performed in an instrumental version.

Song no. 9

Dražen Žanko is the author of the patriotic song *Od stoljeća sedmog*, written in 1990. It sings about the efforts that the Croats invested in establishing their own state for many centuries. The author talks about the difficult historical fate of the Croats, their heroism and the fight for freedom, and their readiness to defend their homeland (Table 10).

Table 10. Text of the poem *Od stoljeća sedmog*

Name of the song	Lyrics
<p>Od stoljeća sedmog</p> <p>(1 259 626 YouTube views)</p> <p>https://www.youtube.com/watch?v=sWohUGO5eFU</p>	<p>Mislili su neki, već nas neće biti, ni veselje svoje nisu znali kriti. Raselit nas triba da nas manje ima, “nisu tu ni bili”, tad će reći svima.</p> <p>Nek tuđinu grizu, roda znati neće, bez jezika narod nema više sreće, djeca roda povist neće znati, potom svoj na svome neće bit Hrvati.</p> <p>Ko na tvrdoj stini svoju povist piše, tom ne može nitko prošlost da izbriše! Varaju se ki ne misle tako, što se krvlju brani, ne pušta se lako.</p> <p>Tko na tvrdoj stini svoju povist piše, tom ne može nitko prošlost da izbriše! Mi smo tu odavna, svi moraju znati, to je naša zemlja, tu žive Hrvati.</p> <p>Kroz vrimena gruba i kroz ljute boje, branili smo časno mi ognjišće svoje, čuvaše nam pređi ovu rodnu grudu, Nisu zbog slobode ginuli zaludu.</p>
	<p>Ko na tvrdoj stini svoju povist piše, tom ne može nitko prošlost da izbriše! Na kamenu tvrdom o tom slova pišu: “od stoljeća sedmog tu Hrvati dišu”.</p>

The melody of the song relies on a gradual interval movement. The rhythmic structure does not contain characteristic patterns. The harmonic

structure rests on the main functions. The two-part formal division (strophe-chorus) is also evident in this song. The most powerful emotional element in the song relates to the textual content, with an emphasis on the moment in which the song was released.

Conclusion

Based on the musical analysis of the selected samples, the author concludes that the majority of patriotic songs from the time of the Homeland War do not significantly differ from popular songs created outside the patriotic context. The movement of the melody mostly relies on gradual interval shifts, while in the field of rhythm there are no more demanding rhythmic patterns. The harmonic structure rests on the main harmonic functions, with the occasional use of secondary dominants. Modulations rarely occur (*My Homeland*). The formal structure indicates a high prevalence of two-part invoice (strophe-chorus). A departure from that formal framework is present in the song *Moja domovina*, with the performance of the thematically new, third part.

In the analyzed songs, the most significant emotional, experiential element, identical to other popular songs, does not refer to the structural, but to the textual element, which is reinforced by the contextual aspect. The analyzed texts indicate that popular songs, inspired by the Homeland War, foster a non-violent, peaceful discourse, which was also supported by official state policy. The prevalent themes are the historical efforts of Croats to create their own state and the tendency to share European values and belonging to the European cultural and civilization circle. In some songs, patriotism is identified with the Catholic religion, and sometimes the themes include appeals to the international community to end the war, and the desire for the end of the war, and the reconstruction of and return to people's homes. In some songs, the content encourages love for the homeland, and glorifies Croatian defenders and their courage, while there are also examples of calling out aggressors and questioning their conscience. Only a small number of songs are characterized by a more aggressive expression, which finds emotional reception only in a small, specific group of listeners.

We can conclude that content was the most powerful element of the emotional experience in the analyzed songs, and the power of these songs lies primarily in the time and moment in which they were created, and the role they played in strengthening the patriotic feelings of their listeners.

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POPULARNA PJESMA U ULOZI POTVRĐIVANJA HRVATSKOGA NACIONALNOGA IDENTITETA

Sažetak

Doživljajni, emocionalni prijam glazbenoga djela ovisi o nizu čimbenika. Pristupi li se tomu složenom fenomenu subjektivno, zaključuje se kako na individualni doživljaj pojedinoga glazbenoga djela utječu vrijeme i mjesto slušanja kao fizički različiti društveni čimbenici, te glazbeni strukturalni i drugi kvalitativni elementi. Popularna glazba zbog svojih osobitosti koje se očituju jednostavnijom melodijsko-ritamskom strukturom rezultira već pri prvom slušanju intenzivnim emocionalnim odgovorom slušatelja. Pri tome veliku ulogu ima tekstualni element koji može u potpunosti promijeniti afektivnu valenciju djela.

U radu se na temelju glazbene analize 9 popularnih pjesama iz Domovinskoga rata, najintenzivnijega društveno-političkoga razdoblja Republike Hrvatske, razmatraju svi doživljajni elementi koji su utjecali na emocionalni prijam i popularnost navedenih djela. Posebno se naglašava utjecaj teksta na afektivnu dimenziju prihvaćanja djela, kao i kontekst u okviru kojega su skladbe nastale te važnost koju su imale tijekom oblikovanja nacionalnoga identiteta.

Ključne riječi: Domovinski rat, emocije, nacionalni identitet, popularna glazba

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THE SPECTATOR PHENOMENON AND THE POWER OF THE GAZE⁹³

Scientific paper
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Abstract

This paper explores the relevant knowledge in philosophy, psychology, art theory, and visual culture dealing with the phenomenon of the spectator. Spectatorship is explored through complex relationships between authors, works, observers, and the environment, which condition the view and consider how social and cultural patterns mediate the image. In this approach, interest is no longer primarily focused on the visual object but on visibility, a complex set of conditions in which a work of art is created, observed, and interpreted, researching the history of the gaze theory: perception and its physiological and cultural conditioning, the implicitness of the observer in the aesthetics of the reception, psychoanalytic theories about the constitution of the subject with a gaze, feminist ideas of voyeurism, and the male gaze, theories on technological and cultural conditioning of the scopic regimes, the cultural history of gaze and the gaze politics that approach viewing as possession of power. An analysis of the theory shows that the role of the body as a perceiving mechanism is present in the naturalistic approach to observation but is avoided due to its subjectivity and relativity. Although it was created in the 1960s, the theory of gaze has roots in the hermeneutics of art history and the aesthetics of reception. The cultural determination of gaze, its dependence on social norms, and the technological conditions of the medium indicate that our view of art and the visual world has been learned, which opens spaces for the acceptance of other gazes that are equally valuable.

Keywords: observer, spectatorship, theory of gaze, relativistic perception, scopic regimes

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Introduction

The spectator phenomenon is closely related to the concept of visuality, which German art historian Suzan von Falkenhausen (2020, 11) describes as a socio-political discourse because the relationships of human life in societies and cultures are visibly described. The paper will highlight different attitudes towards visuality, the real action that takes place when looking at works of art, and the world around us, from the points of view of art history and visual studies.

Any reception between the object, spectator, and artist begins with analytical observation. Expanding the visual field can include historical and cultural factors relating to the history of academic discourse that influences the spectator, artist, and backward-looking works of art (Falkenhausen, 2020, 183). The meanings of images are formed in the process of observation, but are dependent on the social environment, client requirements, and the determinants of the spectator's perception. Falkenhausen (2020, 16) points out several opposites established between the object and the subject in historical art texts: cultural versus empirical, interpretative versus scientific, and historical versus biological. This takes us to visuality, the main interest of visual studies, which is directed to the subject, and not the object of observation (Purgar, 2009, Falkenhausen, 2020).

The interest in the spectator phenomenon lies in the relativity of observers' perception and is incorporated in the theory of gaze, which approaches perception from a relativistic point of view. The relativistic approach to perception starts from the idea that no look is innocent and objective but is always saturated and determined by the internal and external conditions of perception. Inner determinants can include previous knowledge, belief, and customs, but also subconscious desires that, according to the French psychoanalyst Jacques Lacan (1986), are realized mostly through looking. External determinants of perception act as the framework through which we look and are determined by cultural patterns of observation and representation.

Interpretation was found to be but subjective and dependent on the body as a perception mechanism, rather than accurate. Spectatorship is explored through complex relationships between authors, works, observers, and the environment, considering how social and cultural patterns mediate the

image. In this approach, interest is no longer primarily focused on the visual object but on *visuality*, a complex set of conditions in which a work of art is created, observed, and interpreted.

American art historian Michael Ann Holly (2005, 345) points out that every question of looking is a political issue because the spectator possesses the power, just as the power is necessary to make someone watch. This subjective and relativistic approach emerges from semiotics because the primary goal of semiotic analysis of visual art is not to produce interpretations but to explore the understanding of art and the processes by which spectators create the meaning (Bal & Brayson, 2005, 86).

In line with the above, the author has formulated three research questions:

1. What are the relevant insights in the field of philosophy, psychology, art theory, and visual culture that deal with the phenomenon of the spectator?
2. How are theories of art history and visual culture set according to the role of the spectator in reading a work of art?
3. Is it a question of observing a cultural or empirical character, and how are relations between the two opposite poles established in the theory?

The implicit spectator in the aesthetics of the reception

The importance of spectatorship in art history hermeneutics is affirmed in the reception theory. The most crucial starting point of the aesthetics of reception is that the spectator's function is provided in the work of art (Kemp, 2007). According to German art historian Kemp (2007, 229), the aesthetics of the reception have three tasks: to know the signs and means by which communication between the work of art and the spectator is realized, and to interpret their socio-historical and real aesthetic message.

Interest is focused on the communication process between the spectator and the work of art, including visual coding and decoding skills and techniques of transmission. Kemp (2007) emphasizes a dual approach to reading the work of art, which relies on the external conditions of the appearance according to social conditions of interpretation, and internal states of appearance that depend on the visual characteristics of the form and aesthetic experiences based on observation. He recognizes that the timing of observation and the environment it takes place in define the framework

of observation by spectators. It emphasizes the duality of the nature of the reception, which we can associate with naturalistic and relativistic theories of perception. It tries to connect these two phenomena to the integrity of the experience by separating them into external conditions of approach that we can identify using the cultural framework and the internal determinants of perception that we can identify with literal observation.

Kemp points out the importance of the historical conditions of observation and the present moment in which it occurs, emphasizing that the interaction between the work of art and the spectator can never occur on its own, isolated from the cultural and psychological conditions in which the observation takes place (Kemp, 2007). Kemp also reflects on the inability to reduce reception to universal observation, because the contexts in which it is observed constantly change. The reception situation is always open, because old connections remain even when the context of the original environment is lost (Kemp, 2007, 231). He emphasizes the importance of the original context, traced within its visual and representational characteristics.

Austrian art historian Otto Pächt (1999) acknowledges the openness of artwork to multiple interpretations characteristic of polysemic structures. In his descriptions of observation, he uses metaphoric syntagms like *taking an eye* and raising awareness of the observer's gaze and the importance of his presence (Pächt, 1999, 87). Just like Kemp, he emphasizes the importance of liberation from the isolation of formal analysis and seeks methodological ways of organically fitting into a particular historical context without relying on artistic genius and autonomy of the form (Pächt, 1999, 62). In this concept, the object is no longer the main interest of research, like in traditional art history hermeneutics. Still, the ways of seeing come from the subject and the historical context in which the viewing occurs. Such approaches will start the theory of visual culture or visual studies, which will affirm the extreme role of the subject in the reception of art.

The role of the spectator in the naturalistic and relativistic approach to perception

Each interpretation begins with an observation guided by the genetic predispositions of a species but is subjectively shaped by personal life

experiences and the context in which the observation takes place. While looking is an intuitive, reflexive act that actively engages human physiology and psychology, seeing is dependent of the subject's cultural environment and individual predispositions and occurs in the sphere of cognition. Giving meaning to what we look at depends partly on the visual characteristics of the phenomenon. Still, it mostly depends on the cultural conditions of the observation, as well as on the spectator's attitudes. The first theories about perception in the 1950s relied on gestalt psychology, which approached perception as a natural process guided by genetic predispositions. In such a naturalistic approach to perception, two actions are clearly distinguished: looking as a biological-psychological action and seeing as a sociological-cultural action.

The naturalistic approach deals only with looking, although modern relativistic theories about perception have found that the boundaries between looking and seeing are hardly identifiable. Visual observation is crucial to experiencing a work of art with a natural approach. It is closely related to Ruskin's idea of the innocent eye, and its origins can be found in the theories of psychologists Rudolf Arnheim, James J. Gibson, and Richard Gregory. However, they partly opened the door for relativistic interpretations. According to Gestalt Psychology, parts are not treated as separate and isolated entities but are grouped into units (gestalt) by the rules called principles or laws of perceptual grouping. The theory of gestalt, in addition to psychoanalysis, has been proven by visual observation. Each part is inextricably linked to other parts and cannot be understood outside the context of the whole. Arnheim (1985b) disagreed with the idea that perception and thinking were separate actions, believing that the thinking process was integrated into observation on an unconscious level. However, perception abilities can be improved by learning. The mental image of an object is not identical to the object we perceive. In receiving stimuli from the eye to the brain, the viewed shape changes its appearance and becomes geometrically simplified (Arnheim, 1985a). In the process of perception, the cognition of the whole will always prevail over awareness of details.

James Gibson advocated a theory known as an environmental approach to perception. He believed that direct perception is how we receive information by reflecting light in a particular environment. Gibson's (1950) contribution to perception also consists of the stratification of two levels of perception, the schematic and the literal level, which appear in parallel

during the perceptual process. Schematic perception is an observation of valuable and significant things on which we usually focus our attention, like objects, people, places, and written symbols, and literal perception is an observation of the natural or spatial world which we experience by observing surfaces and colors and spatial relationships (Gibson, 1950, 8-10). While literal perception is the foundation for our experiences of the world, schematic perception is necessary to understand the world in which we live. Schematic perception often appears first by spotting the elements of narrative forms, while literal perception must be awakened by raised attention. In observing the artwork, these two types of observations produce different aesthetic experiences that have grown from opposite sensibilities (Tokić, 2016, 19).

Perception, therefore, requires something more than what is presented in Gibson's ecological approach. Perception and intelligence have traditionally been separated in philosophy and science, but the boundary between them has recently been erased. One of the more recent ideas, which defies traditional opinion, is that perception requires intelligent, knowledge-based problem-solving (Gregory, 1997, 1121). Gregory developed a paradigm of active perception in which observation is not only what a person currently sees but also the knowledge they had accumulated in the past. He approached perception as a constructive process, in which knowledge is necessary because the senses convert stimuli into signals using known codes (Gregory 1997, 1122).

These three theoretical approaches to perception, gestalt, constructivism, and ecological perception, have biological grounds, although they also consider the individual construction of observations. They rely on visual experiences during looking and the visual characteristics of the observed form, making all three approaches naturalistic.

The relativistic approach to perception starts from criticism of the naturalistic approach, but it also takes on some characteristics of Arnheim's active perception and Gibson's stratification of perception. While the natural approach relied on the myth of the innocent eye and the development of literal observation, the relativistic approach will be directed at the schematic observation and social construction of ever-changing visions. It focuses on reading pictorial narratives that are historically, geographically, and culturally conditioned and changeable. The development of a

relativistic approach was strongly influenced by the philosophy of Maurice Merleau-Ponty and his theories about the phenomenology of perception. He believed that perception could not only be a strictly defined relationship between the subject, who is outside of the world, and the object inside the world, but must encompass both the subject and the object. According to Merleau-Ponty (1978, 47), perception is a physical rather than a psychological phenomenon, regarding the body both as an object and as a subject.

Austrian-British art historian Ernst Gombrich (1960) considered the relativistic approach especially important because the first theorists interpreted seeing not only as the mechanical action of the eye, but also as an action conditioned by the spectator's foreknowledge and beliefs. Similarly, American art critic Hal Foster (1987) believes that vision is a social act conditioned by a cultural environment and cannot be reduced only to mechanical observation. According to this approach, perception is predetermined by the cultural conditions of visibility and is grounded in the gaze theory. The gestalt theory and the literal perception is more appropriate for reading the visual form, while reading the narrative form, grounded in the schematic perception, is more suited to the relativistic theory of perception, since it considers the conditions of their interpretation in different spatial and temporal constraints, exploring the relationships between the subject's eye, gaze, and vision. Sturken and Cartwright (2001, 31) introduce the phrase *practices of looking* and suggest that looking is not an individual act but is conditioned as any practice by protocol and patterns. They explore the role of the spectator and his gaze in social practices.

The theory of gaze has become a new paradigm for studying perception in the modern multidisciplinary theory of visual studies. According to this theory, the idea is determined externally by the cultural and technological conditions of vision and serves to discipline and construct the subject. This problem mainly arises from psychoanalytic theory, which is a different way of approaching the subconscious from Freud.

Psychoanalytic theory of the subject's construction

The psychoanalytic theory focuses on the processes by which the spectator creates meanings, considering the pleasure we feel about images, which

serve as bonds between our cravings and the natural world. It was most strongly reflected in the research of the audience in film production, from which feminist film criticism developed and established the theory of the male gaze. Croatian art historian Ljiljana Kolešnik (2004, 23) points out that the feminist theory of film developed a theory of gaze that includes: the nature of visuality, differentiation of the way of looking, and the specificity of the subject's identity.

A special significance is attributed to British feminist film theorist Laura Mulvey (1975), who affirmed the concept of the subject's gaze, and first proposed the theoretical approaches to seeing it as a manipulative act. The fundamental interest of Hollywood film production is to satisfy male heterosexual pleasure and power by enjoying the craving look (scopophilia) (Harris, 137). However, she proved the theory on a particular sample of Hollywood *noir* films from the 1920s to the 1950s. Mulvey formulated several ideological reviews from these narratives because commercial films depict ideological patterns in which a woman is portrayed as an object of sexual lust. By emphasizing the male gaze, according to which the world is organized, and therefore art as well, it raises awareness of the possibility of existence of the other, female gaze, and the widespread presence of different interpretive positions.

Practices of looking relate to Jacques Lacan's idea of how people develop their personalities. This author gave great importance to the visual sense and pointed out the formation of the subject as a mirror. Lacan (1986) approached the man as a subject, not an individual, constructed through unconsciousness, language, and lust. People are perceived as individuals even though social structures give them their identities. Lacan (1986, 90) argues that the subject's look is not unencumbered and free but is determined from the outside. He calls it the *preexistence of the eye*, a vision function expressed by the screen. The idea of a screen that defines the look will appear in Norman Bryson (1983, 91), who believes that blind spots and screens cast a shadow between retinal observation and the outside world. He approaches seeing as a practice established in the name of something else, and examines relationships between the seeing subject, social structures, and power relations. Bryson (1983, 94) distinguishes between two types of looking that appear during observations: the gaze (passive directional look, staring) and glance (random, temporal). Glance is an active look, guided by the traces of a process (during the line and brush strokes)

that draw the observer into the temporality of the work's emergence. At the same time, Bryson connects glance with the painting of the East, and the gaze originates from the oculo-centric image of the West based on mimesis and the construction of reality from one point, which is why such a look is static and fixed. Bryson (1983) points out that the gaze indicates much more than the act of looking; it suggests a violently determined and constantly repeated show. The gaze denotes satisfying personal desires by craving staring. The modern theory of the film does not denote the action of looking itself but the vision of relationships characteristic of a particular social environment.

Bryson (1983, 10) highlights the five disadvantages of the naturalistic approach; neglect of the historical dimension, dualism (separation of schematic and literal observations, separation of form and content), the centrality of perception (an oculo-centric vision of the Western European world), style as a limitation, a model of communication (between author and observer that excludes cultural influence). He sees painting as art that signifies something beyond the image that structuralist explanations cannot understand.

The main problem in the approach to painting is the attitude that image belongs to the domain of perception and that the painter who misperceives the world will not be able to meet the criteria of the essential copy (Bryson, 1983, 6). Different cultures create completely different scopic regimes reflected in the ways of creating, experiencing, and representing works of art. It compares temporal Chinese painting to Western painting, guided by the gaze according to the body's activity and the temporality between process and looking. According to Bryson (1983), Western painting renounces the body in two ways, by denying the body of the author visible through the process and by the body of the spectator who reveals the process with a glance. The image always shows the past tense and is painted with techniques that require time-consuming and layered work in which traces of the process will disappear. Unlike European painters, Chinese painters use a painting technique with a spot of ink and brush that does not tolerate error and fixing. Bryson (1983, 89) points out that such a union of bodies and processes, in which the eye of the spectator consistently monitors the brush strokes that build the form, can only be found in performance arts. While in Chinese painting, the background and idea

complement each other and permeate each other, in Western painting, the beginning of painting is the act of hiding the substrate.

Awareness of the cultural variable of the seeing, imposed as natural during observations, is essential for understanding how we create meanings about works of art and a broader range of visual phenomena. Exploring how culture shapes perception and vision can significantly improve the understanding of art and encourage multicultural approaches to teaching. The goal, in addition to raising awareness of diversity, is to promote critical reflection on the possibility of the existence of several different views.

Scopic regimes – the influence of technology and culture on changes in visuality

Some philosophers and art historians listed below have clarified the link between the culture in which observation arises, the technological development of optical aids, and the representation of images. American philosopher Martin Jay (1993, 10) believes that observation occurs within the framework of the scopic regime, the cultural variable of the visual experience, because the ways of seeing are constructed, and the visible world is a social fact. Some cultures, such as European culture, are dominated by a vision based on oculo-centric practices. Throughout history, various aids and tools have been developed to serve as an extension of the eye. Like the other authors listed, Jay explores the influences of various optical aids on the dominant practice of looking, such as camera obscura, stereoscope, telescope, microscope, and cinema. Jay (1993) argues that such practices in Western culture are associated with the conduct of surveillance and spectacle. For Jay, the observation is not only an intuitive action interpreted by the gestalt approach but also involves spotting the cultural rules of different scopic regimes. The cultural variability of visual experience can be considered from different perspectives since not all cultures, periods, and styles have a scopic regime equivalent to the Western one.

According to Jay (1993, 12), optical regimes also have a history, which has been reflected through different practices of established gazes. The introduction of the third spiritual eye, as a corrective that compensates for the shortcomings of binocular vision, is characteristic of religious societies. The aspiration to decentration the monocular subject was achieved

by demolishing the dominant ocular ways of seeing, especially in Hans Holbein's painting *Ambassadors*, combining two visual views in one flat space (Jay, 1993). At the end of the 19th and the beginning of the 20th century, modern art was characterized as non-visual because it was viewed by the dominant ocular regimes, which was considered a universal rule (Jay, 1993). Jay emphasizes that visual culture has changed in the art of modernism because artists have focused on alternative approaches that explore the non-corporeal and cultural character of visions.

Art critic Jonathan Crary argued that the new image production technology affects primary social processes because they run according to dominant visualization models. In particular, he looks back at the art of the 19th century, during which inventions and scientific discoveries created a new breed of the spectator. He sees the difference between the heterogeneous modern vision regimes and the homogeneous Renaissance (Crary, 1992, 2). Heterogeneity is manifested in the fact that most of the historically essential functions of the human eye are replaced by a practice in which visual images no longer have anything to do with the spectator's position in the real world. Vision problems become problems of the body and processes of social power (Crary, 1992, 2). It singled out two models of vision in the 19th century, one that breaks with mimetic representation and perspective space, and another that, driven by photography, develops to perfection a realistic Renaissance ideal (Crary, 1992, 3). He approaches artistic design in history as an indicator of the historical mutation of visibility, expressing interest in the spectator's phenomenon, which he sees as the seeing subject determined by a set of procedures, institutions, and techniques of subjectification. He believed that the transformation of observers in the 19th century was defined by social practices and discourses of knowledge, but also by the roles of different devices such as camera obscura and stereoscope (Crary, 1992, 5).

German philosopher Walter Benjamin also deals with the technical reproduction of art and its influence on the reception of art. He attaches great importance to the invention of photography because it is the first time in history that the eye and lens have replaced the artist's manual work. Benjamin (2006, 23) states that the technical reproduction of a work of art devalues its "here and now." One of Benjamin's fundamental preoccupations is that in the era of technical reproduction, the work of art is losing the aura of authenticity and originality. He believed that human

sensory perception was not conditioned only biologically, but also historically. Benjamin (2006, 24) thinks that technical reproduction caused the work of art to change its function, which is why it is now based on politics instead of ritual. The problems highlighted by Benjamin explore the relationship between vision and visuality and the complex conditions in which viewing occurs.

One of the authors, who approached vision as a complex cultural phenomenon by problematizing the relationship between vision and visuality, is the English art critic John Berger. He emphasizes visual dominance in communication in the modern world, and deals with how we see the world influenced by knowledge and belief. He felt that vision plays a vital role in understanding the world and social relations because it comes before words (Berger, 2009, 7). Berger felt that today we see images differently than ever before, which can be considered explicitly from a perspective. The geometric perspective structures the representation according to the spectator's eyes, so we perceive the image of space as a reality (Berger, 2009). Due to the reciprocal nature of the images, the image could restore the look but also make us aware that we are looked at because the look of others is combined with our look, and we become aware that we are a part of the visual world (Berger, 2009, 9). He also sees the reasons for the change in visions in the fact that the images are no longer related to the space in which they were created because television simultaneously brought images to various places, which changed their meanings (Berger, 2009, 19). He pointed out that images arise in a specific time but can outlive what they represent because the purpose of images is not something closely related to the image itself but can be transmitted or changed (Berger, 2009). Although each image already has a built-in visual mode addressed by the spectator, each spectator also has its vision modes that necessarily change the source codes, especially if there is a significant time distance between the creation of the object and the moment of looking. The technical reproductive nature of the image allowed all images to become timeless as the time distance between the creation and looking of the image closed (Berger, 2009). He believed that certain social relations are already pre-embedded in the image. This technique and representation can only be the means of such relationships because by purchasing the image, we also buy the relationships embedded in it, so the relationship

between seeing and owning the image is one of the essential aspects of understanding.

German art historian Hans Belting tackles the problem of the cultural history of seeing and the invention of perspective as the essential basis for creating the Western gaze. The relationship between Eastern and Western cultures is considered through the aspects of the Eastern and Western gazes and influences circulating through the permeable membranes of the two cultures (Belting, 2010). He does not see the problem of perspective solely in the context of art. Still, he considers its origin from the medieval Alhazen optical tract to applying geometric perspective in modern painting. Belting (2010, 10) suggests that perspective is a cultural technique that influenced changes in the visual culture of the new age. He believes that perspective is a fundamental discovery because incorporating an eye into the image has also contributed to the awareness of the subject of seeing. The subject is equally embodied in the author and the spectator because the primary measure of the images is the spectator's gaze, which summarizes the space into a single point. In the Renaissance, painters and architects found a way to resolve the conflict between abstract obviousness and the actual body, a matter of indefiniteness that shows the spectator's symbolic place (Belting, 2010, 17). He disagrees with the idea that perception is biologically determined and innate, because he believes that each culture subjugates the natural perception to social norms, which is why the look is historically and culturally conditioned. He believes that Western new-age images look back at us as a reflection of anthropocentric thinking and the inner eye in different ways (Belting, 2010, 23). The subject is present when the image shows a view that the spectator considers his own. Belting describes a new culture of perspective imagery through metaphors of windows and horizons. A real or painted window symbolizes the subject's point of view, who looks at the world through the window, and the horizon represents the boundary of the look. When he says that the Western gaze has been rehearsed in his history, he means that collective norms of views are written into it that can be historically explained because, in every society, it is collectively practiced even though everyone perceives it as their own (Belting, 2010, 267).

Conclusion

Although the interest in the spectator phenomenon, considering the spectator's role in the reception of the visual, emerges with the gaze theory in the 1980s, we can trace it to earlier philosophy, psychology, and art history theory. Lacan's ideas about the role of vision in the subject construction and Merleau-Ponty's role of the body in the cognition of the object are among significant philosophical insights that influenced the gaze theory. Psychology has contributed naturalistic theories to observations that approach perception as a physical-psychological action, in which the primary influence has predispositions of the body. The power of subjectivity is also recognized. Under the influence of Lacan's and Merleau-Ponty's philosophy, a relativistic approach to perception emerges, approaching vision as a socio-cultural action. Art history hermeneutics considers the spectator's role within the reception theory, represented in Kemp's view of implicit spectator and open interpretation in Pächt's polysemic approach. The theory of visual culture radically develops an interest in the spectator and focuses almost exclusively on the spectator's observational point of view. Art history theory considers the relationships between the observer and the work of art, mainly dealing with the research of the original context and the author's intention. While acknowledging the openness of the interpretive process, it mostly turns to objective insights about perception. At the same time, visual culture/visual studies explore the relativity of observations and how the environment or context influences the patterns of the observer's gaze. The issue of image observation has both cultural and empirical foundations because looking is biological, and seeing is a social process. Authors listed in the text mainly deal with one aspect or another, and never the interrelationship between these two aspects of observations. The power of the gaze is closely related to the spectator phenomenon, because the gaze is conditioned by the cultural context and the individual subject's predispositions.

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FENOMEN PROMATRAČA I MOĆ POGLEDA

Sažetak

Cilj rada je istražiti relevantne spoznaje u području filozofije, psihologije, teorije umjetnosti i vizualne kulture koje se bave fenomenom promatrača. Gledateljstvo se istražuje kroz kompleksne odnose između autora, djela, promatrača i okoline, koji uvjetuju pogled te se razmatraju načini na koje se slikom posreduju društveni i kulturološki obrasci. U ovakvom pristupu interes više nije primarno usmjeren na vizualni objekt, nego na vizualnost, kompleksan sklop uvjeta u kojima se stvara, promatra i interpretira umjetničko djelo. Pri istraživanju povijesti relativističkog pristupa percepciji u obzir se uzimaju: percepcija i njena fiziološka i kulturološka uvjetovanost, implicitnost promatrača u estetici recepcije, psihoanalitičke teorije o konstituiranju subjekta pogledom, feminističke teorije voajerizma i muškog pogleda, teorije o tehnološkoj i kulturološkoj uvjetovanosti skopičkih režima, kulturalna povijest pogleda te politika pogleda koja gledanju pristupa kao posjedovanju moći. Analiza teorije pokazuje da je uloga tijela kao mehanizma koji opaža prisutna još u naturalističkom pristupu opažanju, ali je izbjegavana zbog svoje subjektivnosti i relativnosti. Teorija pogleda, iako nastaje šezdesetih godina 20. stoljeća, svoje korijene vuče iz hermeneutike povijesti umjetnosti i estetike recepcije koja se afirmirala u književnosti. Kulturološka određenost pogleda, njegova ovisnost o društvenim normama i tehnološkim uvjetima medija, pokazuje da je naše viđenje umjetnosti i vizualnog svijeta naučeno što otvara prostore prihvaćanju i drugih pogleda kao jednako vrijednih.

Ključne riječi: gledateljstvo, promatrač, relativistička percepcija, skopički režimi, teorija pogleda

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CULTURAL HERITAGE AS A TARGET IN CONFLICT SCENARIOS

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Abstract

The focus of this paper is on increasing challenges that Europe faces when it comes to the defense and security of cultural heritage under the legal framework developed by the United Nations (UN) and the United Nations Educational, Scientific and Cultural Organization (UNESCO), and based on the Hague Convention of 1954. Cultural heritage has been, for a long time and in diverse circumstances, both a strategic war target and a hostage in conflicts such as the Balkan Wars and conflicts in the Middle East, and now in Ukraine. Heritage has been intentionally destroyed or threatened, among others, by sophisticated military technologies such as drones, thermobaric explosive devices and in ultima ratio the nuclear weapons threat, which has had severe psychological and physical effects on the people. The growth of the asymmetrical military conflicts in Europe is observed due to the new technologies of war. How does this make cultural heritage a desirable target? Are there mechanisms created by international organizations to act in defense of heritage in the event of an armed conflict?

In order to answer these research questions, the research methodology used in this paper will start with a review of literature about threatening processes in European conflicts, and continue with the collection of data on institutional platforms in order to create the basis for a proposal, an observatory for this theme.

The final conclusion is that cultural heritage is in itself powerful, but also deeply symbolic and fragile at the same time. This power becomes an identity enforcer of a nation and can be considered as a morale booster.

Keywords: armed conflict, cultural heritage, cultural property, NATO, UNESCO.

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Introduction

Cultural heritage is, in essence, a concept that corresponds to a set of goods of various nature in laws and conventions. One of its main attributions is the ability to be enjoyed by citizens, either in a universal sense or integrated in a certain community identity. In summary, cultural heritage is a part of the fundamental elements of a people's identity.

The reflection developed during this research leads to an analysis of cultural heritage defense doctrines in armed conflicts. This idea involves not only the government and its institutional agents such as the ministry of defense, education or economy, but also other structures such as museums and, finally, the collective consciousness of all citizens.

In its simplest expression, if it may be said considering the complexity and vastness of the concept itself, cultural heritage, in terms of its dynamics, is characterized by a series of multidisciplinary activities through which the past becomes legible, interpretable, and perceptible in the present. In this context, many of those who focus on these issues in their academic work or operational practices manage to establish integrated work bases in institutions, which, in terms of methodology, result in the preservation, dissemination and viability of tangible and intangible memories of the past. The vast conceptualization and practice on cultural heritage lead to several questions that continue to be relevant to this day – what should be conserved and what not? Which material and immaterial memories are relevant to the identity substrate of people, nation, or state? Which criteria, ethics, deontologist perspectives, or laws determine the destiny of human production that is called culture? And after all this, how can war affect cultural heritage, and how could the international community like the United Nations (UN) intervene to protect human achievements, when human life is above all morally?

To answer these questions, the authors will use research methodology that starts with the review of literature about defense and security regarding threatening processes in European conflicts. This will be followed by data collection on institutional platforms and correspondent data discussion mapping elements known so far. In the end, we will look into possibilities for future research in countries that face similar situations.

The challenging approaches to armed conflicts and cultural heritage

In a recent article, Dacia Viejo Rose pointed out that “cultural heritage is a central element in the stories that society tells about itself, its origins, character, and future projects, delineating boundaries of belonging and defining who lies outside them” (Viejo Rose, 2021, 41). The principle that recognizes an expanded and deepest intensity when experiencing intangible or material heritage content belonging to one’s native community is another commonly accepted point of view. This means that the transmission, tradition, and familiar beliefs and episodes concerning this issue are shaped by psycho-affective reasons and inner motions as well as the emerging possibility of sharing ideas with other people nearby: it is a matter of a circumscriptive circle. This also means that the symbolic value attributed by those who belong to the community is clearly differently added and felt because it is introspectively contextualized.

Viejo Rose (2021) wrote her article before the Russian aggression on Ukraine, and her reflections arise from recent guerrilla/irregular warfare against cultural heritage as an act of ideology, which takes place in a different context, although some comparisons may be identified as aggressions. Nevertheless, the concept, though keeping its previous meaning, incorporated variations driven by time mentality and pragmatic facts:

“Today heritage is understood as a process of meaning making with constantly evolving associative values that is highly political. (...) The implications of understanding heritage as a process of meaning-making are that it is a highly political and continuously evolving; this volatility disturbs the semantic stability previously associated with heritage sites. Furthermore, it is the relational value of heritage that has come to the fore” (Viejo Rose, 2021, 42).

Three questions are common to any conflict: “What is the process of cultural violence? How is heritage instrumental to it? How can societies recover from the impact of this violence?” People have to be, to exist there, so heritage is experienced as it should and may be transferred between generations. Culture heritage without people lacks its major meaningful goal. Only women and men have the sense, the enlightenment, the capacity of interpreting symbology – Cassirer (1944) *dixit*. In reflections and

research about the main issue of protecting cultural heritage from threats and disasters, we may ask the question: “How does cultural heritage become a victim, or a target or even a hostage”?

Since the late 1990’s, NATO established a cooperation with UNESCO through the Blue Shield Project partnership. In 1999, The Hague Convention Second Protocol introduced the Blue Shield as an advisory board and operational doctrine enhancer to UNESCO on Cultural Property Protection (CPP). This was quite clearly a response to the conflicts in the Balkans and the Middle East, in which cultural heritage became a tactical and strategic target, which we have also seen more recently in the war in Ukraine.

One of the most important issues regarding this kind of partnership was the establishment of rules of engagement for legitimized military operations, requested by the UN or NATO, or even the European Union (EU), to safeguard cultural properties in armed conflicts. There was already a well-established set of rules for humanitarian missions and peacekeeping operations, although always focused on the value of human life. But how to deal with cultural property and heritage? This question has been discussed in a number of doctrinal documents and research papers that will be summarized below.

One of the first examples is the *Handbook on the protection of cultural property in the event of armed conflict* by Mirikelam and Frin (2015). Several chapters of this handbook strive to provide clear instructions and engage the French Army Detached Forces on specific objectives. It is important to mention that the preface to this handbook was written by the UNESCO Director-General at the time, Irina Bokova, and is titled *Culture on the frontline of modern conflicts*.

Other NATO and UNESCO publications, such as those detailed below, confirm the evolution of this concept following the evolution of conflicts themselves after the appearance of large-scale terrorist organizations like ISIS or Syria. UNESCO sponsored the publication *Protection of Cultural Property Military Manual*, proposed by the specialists O’Keefe, Péron, Musayev and Ferrari (2017), for whom the protection of cultural heritage as a property is fundamental. As the authors stated, “In strategic terms, the protection of cultural property in armed conflict is an imperative. Avoidable destruction or damage and all misappropriation of cultural

property by military forces, especially foreign military forces, as well as its looting by others through these forces' lack of vigilance, endangers mission success" (O'Keefe, Péron, Musayev and Ferrari, 2017, 1).

Another publication titled *NATO AND CULTURAL PROPERTY Embracing New Challenges in the Era of Identity Wars* was published in the same year as a doctrine document alongside the abovementioned *Report of the NATO Science for Peace and Security Project: Best Practices for Cultural Property Protection in NATO-led Military Operations*. This publication was a very important NATO document in the period 2014-2017 (NATO Code: SPS project # G4866). Rosén (2017), as Project Director of NATO CPP Board, mentioned as the bulk of this report that:

"In 2014 allied nations approved a two-year NATO Science for Peace and Security project called "Best Practices for Cultural Property Protection in NATO-led Military Operations" (NATO SPS CPP). The stated aim of the NATO SPS CPP project includes developing recommendations on how NATO should approach the question of policy and doctrine related to CPP. To this aim, this report evaluates a) the role of cultural property (CP) in the wars of the 21st century and the rationale for NATO to consider CPP; b) existing work on CPP in NATO; c) lessons identified from NATO-led and non-NATO-led military operations and allied nations; and d) the way forward for CPP in NATO" (Rosén, 2017, 9).

This report was not the last one. There are other, more recent documents that have been drafted and classified as assets by NATO standards.

These topics have also been discussed in publications other than NATO handbooks and manuals, especially because various perspectives combined theoretical reflections and the results of the above reports, facilitating new approaches and questions to the very sensitive question of prioritization of human life or cultural property in armed conflicts. Cunliffe, Fox and Stone (2018), members of the Blue Shield committee, provided deep reflections about the pending challenges of protecting cultural property, and asked a very important question: can the CPP, regarding the main strategical operational frameworks in an armed conflict, become an unnecessary distraction or a relevant mission priority?

Armed conflicts led to damage and destruction of cultural heritage both as collateral damage and as intended targets. However, in large scale military

operations, which involve a massive engagement of financial, human and material resources, a delicate balance is sought between prioritizing human life and/or cultural heritage. This is what is observed in NATO's activity, especially with the USA support.

With the resulting economic crisis, this can become a difficult but inevitable option to take. This is one of the reflections made by Cunniffe, Fox and Stone (2018), which has also been noted in academic studies, such as the one by Baj (2022), who analyses the UN Resolution 2347, giving a well-structured approach to the historical background of military aggression against cultural heritage. This resolution was not about a particular event, but looked at the full context of international armed conflicts and the distinctions between small scale engagements and large-scale war in failed states like Syria, in the Middle Eastern conflict zones and in Ukraine. Earlier UN resolutions, like Resolution 2199 (2015), reflected on the other side of the threat against cultural heritage: illegal trafficking of artwork and cultural assets, which is equally damaging as a drone or missile attack (United Nations, 2015).

However, the most important contribution relates to the analysis of the lessons learned from years of cultural heritage protection in several kinds of conflicts and uncontrollable crises (again Ukraine?). Kelly (2021) introduces a series of basic, although pertinent, questions that frame the real state of threats to cultural heritage. Firstly, cultural heritage is a humanitarian law asset, which is a very important point that earlier authors had not focused on so much in their analyses. According to this author, the protection of cultural heritage is a side subject in military practice (hence the importance of manuals and handbooks on these subjects directed at armed intervention doctrines). Kelly (2021) also states that it was inevitable that human rights movements and organizations would not yet be inclined to make a connection between protecting human lives and protecting culture. These lines of thinking do not undermine the importance of cultural heritage protection, but many feel that this is an unclear field of ethic debate. As Kelly states: "cultural heritage protection is important in peacebuilding and development work, but as yet little systematic evidence as to 'what works'" (Kelly, 2021, 2).

Puskás (2021) presents another perspective concerning European policies for cultural property protection in conflicts. She defends a doctrine for

NATO rules of engagement in military operations protecting cultural heritage. However, Iraq and Syria and the fight against terrorism were one thing, and confronting the Russian aggression and the deliberate use of artillery and tactical non-nuclear missiles against cultural landmarks in Ukraine is a completely different matter. As the author puts it:

“Reflecting on the changing nature of 21st century conflicts and on lessons learned from NATO operations and missions, a Science for Peace and Security (SPS) Programme has been launched on CPP in 2014 to improve NATO’s activities and institutional framework in this field, uniquely using both a conceptual and a practical military approach. The final report of the project has formulated several recommendations for enhancing the establishment of a NATO CPP framework, emphasizing that as CPP has a cross-cutting nature, it is an element to be mainstreamed in the whole range of NATO activities” (Puskás, 2021, 168)

Following this line of analysis, Wang (2022) focuses his reflections on the debate about the need to articulate the international humanitarian law and the protection of cultural property in armed conflict scenarios, and the kind of challenges that will be necessary to accomplish these goals. As Wang says: “(...) before the 1998-1999 war in Kosovo, Serbian law did not protect Kosovar cultural property such as mosques from the Ottoman period, with only a few exceptions. As a result, Serbian religious historical sites in Kosovo were destroyed after the conflict, and UN military personnel were needed to protect them” (Wang, 2022, p.68). At the same time, an International NATO force (KFOR) was and is still present in Kosovo, with an UN mandate to prevent the escalation of the conflict between Kosovars and Serbians. Both sides targeted the other side’s mosques and Orthodox churches in 1998 and 1999. Nowadays, the UN, EU and NATO can only assist indirectly in the war in Ukraine, which has lasted for almost 12 months. In addition to the humanitarian disaster that is still unfolding, Russian missiles and artillery keep targeting Ukrainian cultural heritage with a most clear purpose of erasing the enemy’s cultural right to exist.

People identities and cultural heritage in war contexts

Relationship between cultural heritage and conflicts

In situations of war and other scenarios of armed conflicts, such as terrorism, UNESCO and the local authorities do their best to “mark cultural sites and monuments with the distinctive ‘Blue Shield’ emblem of the 1954 Hague Convention for the Protection of Cultural Property (...) to avoid deliberate or accidental damage” as can be understood in the sense of the *Convention for the Protection of Cultural Property in the Event of Armed Conflict with Regulations for the Execution of the Convention of Hague, 14 May 1954* (UNESCO, 1954).

In his analysis of the present situation of the war in Ukraine, Lassiter points out:

“The destruction of cultural sites in the Russian invasion of Ukraine demonstrates the calamitous power that war continues to have on cultural property across all areas of the world. Targeting historical and religious sites is not a new tactic, and the trend will not be stopped with the current policies in place. The actions of the International Criminal Court and the United Nations in the coming months and years will be telling as to what organizations will be most successful in preventing destruction and preserving cultural sites in the future” (Lassiter, 2022, 22).

Which conclusions can be drawn at present from the relationship between cultural heritage and conflict?

Until now, this relationship has been studied largely in terms of how treasured objects and sites are physically destroyed and looted during wars, and the measures employed to mitigate this damage. These approaches focus on the materiality of heritage, considering it as a passive resource to be protected. Lassiter’s (2022) analysis of recent changes in armed conflicts and threats to cultural heritage, from large-scale terrorism activity to conventional war scenarios like Ukraine, shows that presently there is a broader range of enhanced dangers regarding the protection of cultural property. This is supported by the statements from affected communities, like in Ukraine, such as those cited above. Heritage is not only used to

build cohesion; it can also be used as a weapon. This has important implications for the design of reconstruction and reparations, for how do you build something new on a mined field.

Strategies for Ukrainian cultural heritage in times of war

Few days after the war began, on the 8 March 2022, UNESCO expressed its concern in a press-release titled “Endangered heritage in Ukraine: UNESCO reinforces protective measures”, last updated at 21 April 2022. In the press-release, Audrey Azoulay, UNESCO Director-General (2022) states: “We must safeguard the cultural heritage in Ukraine, as a testimony of the past but also as a catalyst for peace and cohesion for the future, which the international community has a duty to protect and preserve”. Cultural heritage director expressed how urgent it was and how the situation had to be followed-up in the field, in order to track as much of the damage as possible. Later on, Azoulay goes on to state: “The first challenge is to mark cultural heritage sites and monuments and recall their special status as protected areas under international law” (Azoulay, 2022), and points out that: “Properties inscribed on World Heritage list, such as the site of ‘Kyiv: Saint-Sophia Cathedral and Related Monastic Buildings, Kyiv-Pechersk Lavra’, are considered a priority. The marking process started this weekend at the site of ‘Lviv – the Ensemble of the Historic Centre’ (Azoulay, 2022).

In addition to the process of marking, safety measures were also quickly taken in the first week of the war, as shown, for example, on Bernard Armand’s photo published in *Euronews Culture*, under the subtitle: “Lviv museums empty out as the cultural sector moves heritage objects ahead of a possible push westward” (Gallagher, 2022). Another key measure was promoted on social networks, asking the public to use their knowledge of destroyed/damaged properties and their GPS coordinates and/or audio-visual captions, and input information to an access-friendly and well-operating website developed by the Ministry of Culture and Information Policy of Ukraine (2022a).

A few weeks after the war started, by the middle of March, anyone could already access ten pages containing a list of damaged locations and heritage goods. In late June, 383 destroyed cultural objects were reported, and

the number of pages on the platform had increased to 39. The website provides a list of evidence of the effects of the war and destruction, grouping material heritage in categories including “Places of worship”; “Historic/Heritage Buildings/Architecture” and/or “Ancient Buildings”; “Urban Planning” and “Monuments”, which are the most cited and numerous, followed by “Museums” and “Theatres”; “Libraries”; “Archives” and a few “Sculptures”.

The 383 destroyed/damaged objects are identified and chronologically positioned depending on their origin and geographical location. A short description of each item is provided, including information on typologies and characteristics. The platform is user-friendly since items can be accessed by clicking “enter” or “see more” menus. The crude portraits of destruction are there to be seen, the corresponding photos accessible in a single click. The images are of good quality, also showing the surroundings of the ruins or damaged places, and sometimes persons, both military or civilians, are visible near the destroyed or ruined areas. In a few of the photos, given the appearance of the buildings depicted, one might think the image was taken before the war, because the damage is at a first glance almost imperceptible.

The safeguarding of intangible cultural heritage is of general interest to humanity and should therefore be pursued through a cooperation between bilateral, subregional, regional, and international parties. Communities, groups and, when applicable, individuals should never be alienated from their own intangible cultural heritage.

Since 10 March, *Ukrainian Cultural Foundation* (UCF, 2022b), has been operating as an Archive/Research Platform that collects information about heritage and cultural war casualties and issues, complementing the above-mentioned platform operated by the Ministry of Culture and Information Policy. The UCF is described as:

“a state-owned institution created in 2017 in correspondence with the Law of Ukraine with aim to facilitate development of culture and arts in Ukraine, to provide favorable environment for development of intellectual and spiritual potential of individuals and society, wide access for the citizens to national Cultural Heritage, to support cultural diversity and integration of the Ukrainian culture into the world cultural space. The Ukrainian Cultural Foundation

supports projects through a competitive selection process. Activities of the Ukrainian Cultural Foundation are guided and coordinated by the Ministry of Culture of Ukraine” (UCF, 2022a).

The list of categories on the UCF website is heterogeneous, and also includes among war crimes some less recognized subcategories such as the destruction of or damage to archeological objects: mounds, shafts of ancient earthen fortifications, excavation sites, etc.; facts of injury/death of civilians as a result of the weapons used in an attempt to damage cultural facilities by the occupiers; and seizure of property, looting of museums, libraries and other cultural institutions by the occupiers. The website announces that data available for public use will be published on the portal, and verified materials can be transferred to the International Criminal Court in Hague for investigation” (UCF, 2022b).

In summary, when reading UCF principles concerning its “Mission”, “Priority Activities” and “Strategic Goals”, it is quite clear why so many other Cultural Heritage Nominations were presented to UNESCO between 1989 and 2019.

Before ending this chapter, it is important to mention the UNESCO’s Tentative List as another strategy for defending Ukrainian cultural heritage.

A *Tentative List* is an inventory of those properties which each state party intends to consider for nomination. Table 1 is an example of a list of Ukrainian properties.

Ukraine’s strategy regarding cultural heritage aims not only to preserve past heritage for the present and future, but also insists on raising awareness of modern heritage. Ukrainian members have been active partners at renowned groups and associations such Europa Nostra (founded in Paris, 1963). Another example is the Digital Agora, a platform targeting all interested citizens, which asks them for direct cooperation and input on social networks and other broader communication tools.

Table 1 List of properties

<u>Historic Centre of Tchernigov, 9th -13th centuries - 1989</u>
<u>Cultural Landscape of Canyon in Kamenets-Podilsk - 1989</u>
Tarass Shevchenko Tomb and State Historical and Natural Museum – Reserve - 1989
National Steppe Biosphere Reserve "Askaniya Nowa" - 1989
Dendrological Park "Sofijivka" - 2000
Bagçesaray Palace of the Crimean Khans - 2003
Archaeological Site "Stone Tomb" - 2006
Mykolayiv Astronomical Observatory - 2007
Complex of the Sudak Fortress Monuments of the 6th - 16th c.- 2007
Astronomical Observatories of Ukraine - 2008
Historic Center of the Port City of Odessa - 2009
Kyiv: Saint Sophia Cathedral with Related Monastic Buildings, St. Cyril's and St. Andrew's Churches, Kyiv-Pechersk Lavra (extension of Kyiv: Saint-Sophia Cathedral and Related Monastic Buildings, Kyiv-Pechersk Lavra) - 2009
Trading Posts and Fortifications on Genoese Trade Routes. From the Mediterranean to the Black Sea - 2010
Cultural Landscape of "Cave Towns" of the Crimean Gothia - 2012
<u>The historical surroundings of Crimean Khans' capital in Bakhchysarai - 2012</u>
Derzhprom (the State Industry Building) - 2017
<u>Tyras - Bilhorod (Akkerman), on the way from the Black Sea to the Baltic Sea - 2019</u>

Source: <https://whc.unesco.org/en/statesparties/ua>

A variety of actions are also taking place in the European community, such as the appeal to the international community formulated by the Mayor of Krakow:

“The appeal is addressing all public and private institutions, conservation services and institutions engaged in the protection and restoration of Cultural Heritage, the partner cities, museums, universities, libraries, archives, construction companies, warehouses, supermarkets, fire departments, Voluntary Fire Brigades, security companies, as well as companies involved in restoration and conservation – for material and technical support in protecting priceless cultural assets (objects, museum collections, equipment of shrines and temples) from fire and warfare.” (Krakow open city, 2022)

This appeal was made on 3 March from L'viv. All details, procedures and orientations are stated on the website. According to <https://whc.unesco.org/en/statesparties/ua>, Kyiv and L'viv have 32 interventions recognized by UNESCO. These two cities, together with Kharkiv and Odessa, are the major cultural heritage sites. They are also members of UNESCO's Creative Cities Network. This makes them fundamental for the history of humanity, as well as for personal and collective memory.

Research Methodology and Discussion of Results

Questions raised in the paper can now be schematized in the form of research objectives. This empirical study seeks to understand:

- a) What is the situation regarding the defense and security of cultural heritage in an environment of armed conflict?
- b) What mechanisms have the international organizations developed to act in defense of cultural heritage in the event of armed conflict?
- c) Does the fact that the doctrines are not applicable in all cases lead to risks such as the possibility of a 3rd World War?

In the beginning of their work on this paper, the authors proposed qualitative research that would analyze in-depth interviews with war refugees, who would share their testimonies on these initial ideas. However, as the authors started collecting data, it became quite clear that the refugees were psychologically unable to help the investigation team. The first desired result thus proved impossible to achieve. The research team therefore decided to postpone the interviews and subsequent discussion of results.

The war in Ukraine led to a sudden suspension of cultural life in the country. Indeed, most artists have lost their source of income, art collections are threatened, and an increasing number of heritage properties are being destroyed and/or damaged. Cumulatively, many artists and cultural professionals chose to leave for EU countries, thus working in exile.

According to the Ministry of Culture and Information Policy of Ukraine (2022b; 2022c) at the end of June 2022, the figures were as follows:

- 123 cultural heritage sites had been damaged;
- 9 cultural heritage sites had been completely destroyed;
- 79 culture/theaters/library buildings had been destroyed.

In September 2022, the MCIP (Ministry of Culture and Information Policy of Ukraine) had information about 479 Russian crimes against Ukrainian cultural heritage on record. This national platform (available at <https://culturecrimes.mkip.gov.ua>) aims to share up-to-date information, photos, and videos depicting the destruction of heritage culture, show useful resources for learning the Ukrainian language, share projects to fight disinformation, or present war poetry, among many other initiatives.

Most of the crimes (97) took place in the Kharkiv region (80 in the city and the remaining 17 in the surroundings). The following table summarizes the cases documented in the main Ukrainian cities:

Table 2. Number of documented cases, by Ukrainian cities, of destruction of cultural heritage

Ukrainian city	Number of documented cases
Donetsk	92
Mariupol	61
Kyiv	70
Bucha	44
Chernihiv	38
Luhansk	32
Sumy	28
Zaporizhia	13
Zhytomyr	6
Kherson	5
Mykolaiv	4
Dnipropetrovsk	3
Odesa	2
Lviv	1

Source: Adapted from Biletska, T., 2022, Personal memories of the war and reflections on the power of cultural relations, ENCATC Newsletter, issue n°3, August 2022, pp. 18-24.

Currently, we know that nine cultural heritage sites in the Donetsk, Kyiv, Sumy and Chernihiv regions have been completely destroyed, and the condition of another 25 damaged objects remains unknown. All damaged buildings have sustained different levels of destruction: 58 were severely damaged, mostly by artillery fire, missile hits and aerial attacks, and 123 were moderately damaged. Among the damaged sites, 21 are sites of national importance, 95 are sites of local importance, and seven are newly discovered cultural heritage sites. 173 sites were slightly damaged, also due to close combat engagements.

In total, more than 100 valuable historic buildings were damaged or destroyed, with the religious buildings being the most affected.

The Russian Army and Russophone separatists of Donbass and Donetsk destroyed 43 memorials in Ukraine honoring historical figures and events of the 19th to early 21st century, 31 buildings and complexes of museums and reserves, 79 culture, theater and library buildings, as well as some other valuable historical or similar buildings.

Conclusions

When the war started in mid-February 2022, it became clear that this would be a conflict not only between two peoples (Russian and Ukrainian), but between all of humanity, realizing that, from now on, wars would come to symbolize an act of cruelty against the possibility of any country to choose its own path of development, instead of representing a conflict between diverse interests (economic or religious, among others).

In this sense, the concept of security asserts itself as the guarantee of non-violent and diplomatic behavior, or as the resolution of any international dispute and the prevention of any type of military escalation, becoming the fifth pillar of sustainable development, together with economic growth, inclusion, environmental balance, and cultural development through inclusion in public policies.

Furthermore, issues such as security and peace become the focus of social development, understanding that, without it, humanity will be increasingly close to planetary disaster and self-destruction.

The war in Ukraine has led to the biggest refugee movements in Europe since World War II. Thousands of women, children and old people were displaced and had to leave behind their personal belongings. Despite these harsh conditions and the deep psychological damage that was inflicted on all those victims of this war, with no end on the horizon, most of them are struggling to maintain their identity and culture. This is also a way to resist the risks of a cultural genocide. These spiritual wounds sustained by the Ukrainian refugees need to be tended and supported by providing cultural practices and programs that help overcome the war trauma. It is

an opportunity to improve art therapy and to promote cultural interactions between the refugees and the host countries.

By synthesizing a set of doctrines from different international organizations in this paper, the authors found that there is a series of documents that provide for action aimed at preventing damage to cultural heritage and at protecting it in case of armed conflict. However, the situation is sadly ironic given that, despite the existence of a doctrine and rules of engagement that should be used in all situations, the *real politik* sometimes does not allow it.

If the above principles were applied to protect the Ukrainian cultural heritage, enforced by NATO intervention, we could slide into World War III. If this happened, there would be no more heritage to protect, which is a manifestation of “inverse power”.

The case of the Ukrainian war is not the only one. There are other scenarios in which cultural heritage is at risk across the world that require further analysis, many of them under UNESCO protection. It would be beneficial to carry on this research to obtain a broader mapping of countries in similar situations.

Despite all the scientific and theoretical grounds presented in this paper, the opinions and feelings of the Ukrainian people are irreplaceable. We will respect their time while still living in Portugal to achieve one of the main goals of this project, never losing sight of the human face of war.

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KULTURNA BAŠTINA KAO META U SCENARIJIMA SUKOBA

Sažetak

Cilj ovog rada je usredotočiti se na povećanje europskih izazova za obranu i sigurnost kulturne baštine, pod pravnim okvirom Ujedinjenih naroda (UN) i Organizacije Ujedinjenih naroda za obrazovanje, znanost i kulturu (UNESCO) – koji se još uvijek temelji na Haškoj konvenciji iz 1954. Kulturna baština je dugo vremena i u različitim okolnostima bila i strateška ratna meta i talac u sukobima poput Balkanskih ratova, Bliskog istoka i sada Ukrajine. Nasljeđe je namjerno uništeno ili pod prijetnjom, s teškim psihološkim i fizičkim učincima na stanovništvo, uključujući sofisticirane vojne tehnologije kao što su bespilotne letjelice, termobarične eksplozivne naprave i u konačnici prijetnja nuklearnim oružjem. Primjećuje se rast asimetričnih vojnih sukoba u Europi zbog novih tehnologija ratovanja. Kako to čini kulturnu baštinu poželjnom metom? Postoje li mehanizmi koje su stvorile međunarodne organizacije za djelovanje u obrani baštine u slučaju oružanog sukoba?

Kako bi se odgovorilo na ova istraživačka pitanja, metodologija istraživanja započet će revizijom literature o prijetećim procesima u europskim sukobima. Zatim će se nastaviti s prikupljanjem podataka o institucionalnim platformama kako bi se stvorila osnova za prijedlog, Opservatorij za ovu temu.

Na kraju, rezultati će zaključiti da je kulturna baština, sama po sebi, moć i da je u isto vrijeme duboko simbolična i krhka. Ova moć postaje sredstvo za jačanje identiteta nacije i može se smatrati dizačem morala.

Ključne riječi: vojni konflikt, kulturna baština, kulturni posjed, NATO, UNESCO

*Daria Kuharić*⁹⁵

CULTURAL GEOGRAPHY: OLD SLAVONIAN OAK TREES

Scientific paper
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The paper provides a scientific insight into the history of human interaction with the environment. It focuses on the history of the Slavonian (oak) tree forests and lumbering that inspired the artists and their images. On the one hand, there is the well-known pre-war Vinkovci photographer, Franjo Körner (1901-1945), whose valuable collection of 97 glass plate negatives was accidentally discovered in 2020. Unlike Körner, another artist from Vinkovci used words to express his passion and love for the Slavonian (oak) tree forests. Being a professional forester, Ivan Kozarac wrote numerous poems, short stories and novels inspired by the Slavonian landscape. From the perspective of new cultural geography i.e. literature geography, the landscape is not simply a material artifact that reflects the culture in straightforward ways but is laden with symbolic meaning that needs to be decoded concerning the social and historical context.

Keywords: cultural geography, glass plate negatives, literature, Slavonian oak tree forests

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Introduction

This paper explores a brief part of the history of human interaction with the forested environment, both in artistic and economic terms. Archival, private, and digitalized collections provide a historical context for showing the impact of human use of natural resources from an interdisciplinary perspective. Recently discovered (2020), a rich private collection of 97 glass negatives documents the history of human interaction with the environment, focusing on the history of forests and lumbering that *empowered* the artist and his images. Most of the collection consists of pictures taken in the 1930s. The author of the series “Old Slavonian Oak Woods” is Franjo Körner (1901-1945), the well-known pre-war Vinkovci photographer. To show what visual art *sees* and what the word of literature *says*, the paper is based on comparing the private and professional lives and works of two artists strongly connected to Vinkovci, Slavonia, and its (oak) forests. It was Josip Kozarac who – by using the power of words – superbly transformed the *power* of Slavonian forests into the short story “Slavonian Wood.” By no means were Körner and Kozarac the only artists who found inspiration in the splendor and glory of the Slavonian woods. They used to be an essential element of the lives of its inhabitants throughout its entire history, especially during the modernization processes of the 19th century.

We aim to stress the necessity of interdisciplinary research; on the one hand, there are beautiful descriptions of Slavonian forests arising from the unconditional love of the woods and nature. From the perspective of new cultural geography, for instance, the landscape is not simply a material artifact that reflects the culture in straightforward ways but is laden with symbolic meaning that needs to be decoded concerning social and historical context. Since the 1980s, cultural geography has been developed to examine the broad range of ways in which culture evolves and makes a difference in everyday life and places. Through the cultural turn, there has also been a move to explore how culture intersects with other forms of geographical inquiry, such as the economic and political, arguing that these domains are deeply inflected and shaped by cultural processes (Research Guides at Dartmouth Colleague, 2022).

On the other hand, artistic images of undisputed beauty, although created for the needs of forest products companies, show how theories from forestry and geography can enhance an art-historical reading of the

photo archive and suggest an interdisciplinary approach to interpreting the photographs.

The power of oak forests

In the history of Croatia, forests have served for people's survival and the economy's recovery after numerous hardships and wars. Almost half of the land area of our country is stocked with forests and other kinds of forest land, so Croatia is considered one of the most forested countries in Europe. Slavonia's history cannot be separated from the history of its forests. To illustrate, in the area of Slavonia, the first Forest Order (Rule of Conduct) was passed in 1755. It stated that the stewardship of Petrovaradinian, Brod, and Gradiška forests should be entrusted. The Forest Order contained many favorable regulations about forest management and exploitation, which were later incorporated into the Forest Order of Maria Theresia (1769). The special place in the history of Slavonian forests belonged to this majesty – the oak. Along with their economic value, lowland pedunculate oak forests are of undisputed ecological and social importance. Dubravac, Perić, and Tijardović (2015, 13) believe that the Croats are emotionally attached to the pedunculate oak: it is mentioned in the Croatian national anthem or can be found on the coin and postal marks.

A large number of authors investigated the area of the Spačva Forest Basin during the last century and a half. For instance, in his book "Old Slavonian Oak-grove" Tonković (1986)⁹⁶ explains that the term *Slavonian oak forests* includes "the Pedunculate Oak forests of the Sava Valley along the left bank of the Sava River on the Sisak-Zemun division. Covering an area of c. 130.000 ha, they achieve a size of European proportions in this type of forest." In his words, this is not a coherent complex; the central part is represented by areas near the town of Vinkovci – the well-known Spačva or Bosut Forest Basin. According to recent estimates by forestry scientists, before massive exploitation in the 19th century, some 70% of Slavonia was covered by forests (Histwood, 2019). From the historical point of view, the forests were of the primeval type due to poor colonization and were still

96 The book lacks pagination.

rarer with the arrival of the Turks. During the Middle Ages and the Early Modern Period, human activities had little influence on forested areas due to a relatively small population and less advanced exploitation techniques (Histwood, 2019). A detailed description of oak forests can be found in Friedrich Wilhelm von Taube's travelogue "Historical and Geographical Description of the Kingdom of Slavonia and the Province of Syrmia". This German administrative officer in Austria wrote his perceptions during the trip (1777 – 1778) in a script in which he showed his admiration for waste Slavonian oak forests. According to his description, Slavonian oak trees "are of rare beauty and have healthy trunks. Their heights and vertical growth speak for rich, fertile soil." (Taube, 2012, 26). Along with the praise for the undisputed beauty of the forests, Taube criticized the neglect of the cut oak tree for building new roads. He strongly resented the attitude of the locals toward the uneconomic use of the logs left rotten in the woods or aside the ways (Taube, 2012, 27).

Recently, a research project, "From Virgin Forests to Ploughlands: History of Anthropisation of Forests in Slavonia from the Middle Ages to the Beginning of the Century" (IP 2014-09-6719), was conducted at the Department for the History of Slavonia, Syrmia and Baranya of the Croatian Institute for History.⁹⁷ According to the project team consisting of historians and forestry experts, the objective of this project was to determine the extent of human influence on the Slavonian forests from the Middle Ages to the beginning of the 20th century and to determine the importance and essentiality of this process for the modernization of Slavonian region, especially during the period of increasing industrialization and urbanization in the 19th century (Histwood, 2019). "For the Slavonian Oak wood of that period, the chronicles mentioned that owing to its properties, it had no equal in the whole world and that on the Central and Western Europe's markets, it was in great demand, and for more than a half-century it ruled the market" stressed Tonković (1986).

Besides their impact on the economy, the forests also affected the mentality of the Slavonian people through their influence on everyday life and have retained an important place in the cultural identity of the Slavonians until today (Histwood, 2019).

97 The Project is financed by the Croatian Science Foundation in duration of four years (June 1st 2015 – June 1st 2019).

The power of glass plate negatives

This study has been framed within one discourse in the visual arts – the one that concerns the vigorous scholarship within photo history. Over the last forty years, there has been a shift from aesthetic, formalist, and comparative art history to a controversial, critical and cultural analysis. These shifts from the pictorial to the political, decentre the photographer and bring into focus the photographed and viewing subjects, are enough to remind us that no discipline, whether art- or photo-history or forestry, speaks with a single voice (De Lorenzo, 2015, 3). In the paper, a recently discovered collection of glass plate negatives showing Slavonian oak tree forest is described for the first time in the sense of cultural analysis. i.e., cultural geography.

Photographs result from various photographic processing transformations as part of the original archive material deposited in libraries, archives, and museums (LAMs) or in private possession. According to Gržina (2010, 63), the negatives play an essential role since they present the material containing the originally captured images. It is worth remembering that they preserve images crucial to the visual era, including historical events and persons, scientific proof, and artistic impressions. In essence, negatives represent unique photographic images formed within the camera that may produce multiple positive photographic prints after exposure to sensitized paper.

It is commonly believed that “photographs” are plastic-based negatives, despite these photographic techniques being relatively recent inventions. Before digital image files, photographers captured images on glass plate negatives even before there were film negatives. Bahnemann (2012) reminds us that before the invention of cellulose nitrate film in 1903, photographic emulsions were made on glass supports. These glass supports are typically referred to as glass plate negatives. The term “glass plate negative” refers to two different formats: the collodion wet plate negative and the gelatin dry plate. Both formats contain a light-sensitive emulsion fixed to the glass plate base with a binder. Gržina (2010, 64) provides the data that collodion wet plate negatives were used from 1851 to 1885, while gelatin dry plates were longer in use (1878. – 1940, up to 1970). In the 1870s, many attempts were made to find a dry substitute for wet collodion so that plates could be prepared in advance and developed long after exposure,

thereby eliminating the need for a portable darkroom (Encyclopaedia Britannica, 2022).

They also found their use in Croatia: Gržina (2010, 72) explains that dry plates were used continuously daily in the 30s of the last century. That this was the case is proven by the discovery on February 22nd, 2022, in Vinkovci. Franjo Körner's collection of glass plate negatives, "Old Slavonian Oaktree Forests", was packed in four white and yellow boxes. These almost century-old negatives are uniquely large (13 x 18 cm) and were in serious need of cleaning and re-housing. Nevertheless, it was an incredible discovery because glass plates survived intact, although not appropriately stored according to modern requirements (individual sleeves and boxes, vertical position within the larger box). Three out of five boxes with the removable lid were labeled with information on plate dimensions, the number of plates, and the title of Körner's oeuvre – *Old Slavonian Oaktree Forests*.

What might these mean to the scientific communities? These pictures that emerge are, in De Lorenzo's words (2004, 147), "of a re-awakening of complex visual heritages within some of the social sciences." By its regulations, the Brod Estate Community (Brodsko imovna općina) in Vinkovci⁹⁸ imposed requirements on private firms or individuals to photograph the sold oak trees, especially those sold abroad. This task, which Tonković (1986) praises to be "realized masterfully," was performed for many years by the owner of the famous photo atelier *Foto Etienne* from Vinkovci, Stjepan Kirschweg (1865-1935)⁹⁹. After his retirement, Franjo Körner took the job over.

As previously mentioned, Körner's glass plate negatives were discovered in the attic of the old abandoned family house at 2 Zagrebačka Street in Vinkovci. The loft was cleared out: just the dark corners were filled with boxes of unknown content, covered with piles of dusty old embroidery magazines and weekly journals from the mid-20th century¹⁰⁰. The white

98 The main resources of the ten estate communities were vast wooded areas of the Military Border. Since the area of former Brod regiment was covered by remnants of lush high-quality oak forests, Brod Estate Community gained significant resources through trading and managing the forest goods, positioning itself among the wealthiest estate communities of the former Military Border (Damjanović, 2011, 184).

99 Kirschweg's photographs are available in "Old Slavonian Oak-grove" by D. Tonković (1986)

100 The house was abandoned in 1991.

boxes (13x19x4cm) seemed to be adequately cared for: they were sealed with a thin but firm string and rubber bands. For illustrative purposes, in this paper, only one white box is inspected, described, and explained to provide a detailed insight into the worthy collection. On its removable lid, some data was written in handwriting but hard to read due to the use of pencil and discoloration:

- *“Negatives of the Old Slavonian Oak Forests*
- *dimensions 13 x 18 cm*
- *20 pcs*
- *with the description. “*

A part of this data was also written on the narrow side of the lid. But, the data from the top did not match the content: there were 18 glass plate negatives of the said dimensions along with a smaller one (9x11,5cm), whereas 6 lacked the description. The most common injury of the found gelatine glass plate negatives was the so-called silver mirroring explained by Gamulin and Kiseljak (2016, 301). Although usually seen at the edges of the negatives, it was not restricted to this area and manifested as a bluish metallic reflection. Körner marked the location of the shooting, the buyer's name, and the year(s) on the plates themselves.

- **Locations**¹⁰¹ Körner took images of *Ilijanska* (forest near Garčin), *Paovo* (hunting ground near Soljani), *Kragujna*, *Jošava I. i Jošava II.*, *Merolino* (forest and hunting ground near Cerna), Čunjevci, *Radiševo* (forest reserve near Vrbanja) and *Rastovo* (forest reserve near Gunja). Interestingly, these forests (except *Ilijanska* and *Jošava*) were included in the list of oak forests created by the Brod Grenz Regiment¹⁰² in 1820, providing information about their size in acres and square fathoms.
- **Buyers** It was challenging to decipher Körner's short forms of some firm or to find out that they were misspelled. Nevertheless, all the effort was rewarded by establishing the importance of his clients.

101 The names of locations were checked and found in GoogleMaps.

102 HR-HDA-Fond 445 (Brodsko graničarska pukovnija), Odjel graničarske uprave, Upravni odsjek, Šumarski ured, kut. 206 (1813.-1821.) b.b (Mastungs-beaugenscheinigung pro anno 1820) in Radošević, M. (2018) Šume Brodske pukovnije u drugoj polovici 18. i početkom 19. stoljeća (Forests of the Brod Grenz Regiment in the second half of the 18th and the beginning of the 19th century).

Filipa Deutscha sinovi

One of the buyers under the obligation to make shots of felling units taken over was the firm “Filipa Deutscha sinovi.” This name appears on two glass plate negatives (Photo 4) dating from 1935-1936.



Photo 1. The postcard – “Steam Sawmill Filipa Deutscha sinova” Zagreb (“Paropilana Filipa Deutscha sinova” – sent from Sisak to Budapest on January 24th, 1916

Source: https://get.google.com/albumarchive/115832472923921605832/album/AF1QipNUogILLM41azCFDgPg5qZ_K7CNypOBVjAu6wn8/AF1QipMSf1fv8QZc5rh8ULnSTZYMyIomvvMVT45b_503

According to the Jewish Biographical Lexicon (2018), Filip Deutsch was an active entrepreneur. In Zagreb, he had a storage company for timber and firewood sale. In 1884 his company “Filip Deutsch i sinovi Zagreb” (Filip Deutsch and sons Zagreb) produced the columns for the Podsused bridge. Deutsch bought, in 1910, 50 acres of land from the noble municipality Turopolje (*blog.dnevnik.hr*, 2013). On that land, Deutsch founded the steam sawmill (1911), which he named “Paropilana Filipa Deutscha sinova” (Photo 1). Deutsch’s workers were treated fairly with an eight-hour working day, a rarity at the time, with hot meals, decent salaries, and housing for every worker. Deutsch was also a great philanthropist who often aided the poor. In Zagreb, twice a year, he would donate two to three wagons of wood during the winter. For his contribution to the

development of the Turopolje region, Deutsch was awarded the title pl. (*plemeniti* in Croatian)¹⁰³ Maceljski per Macelj forest.

Their steam sawmill was advertised in different formats in the “Forestry Journal” over the years. (Photos 2 and 3)



Photo 2. Advertisement from the “Forestry Journal” from 1922
 Source: Šumarski list, Number 7, November – December 1922 p. 706
<https://www.sumari.hr/sumlist/192207.pdf>



Photo 3. Advertisement from the “Forestry Journal” from 1936
 Source: Šumarski list, Number 2-4 February – April 1936. p. 217
<https://www.sumari.hr/sumlist/193602.pdf#page=152>

103 *noble* in English



*Photo 4. Glass plate negative with two inscriptions:
“F. Deutscha Sin. Zgb.935-6.” and “Kragujna (not sold) 935-936“
Source: author’s private family collection*

Grossmann

The twice-mentioned name *Grossmann* probably refers to G. Grossmann, the Jew from Brod na Savi. According to Švob (2010, 204), he traded with furniture. Grossmann's name is written on two glass plate negatives, one being overwritten (Photo 5).



*Photo 5. Glass plate negative with the inscription
"Kragujna Grossmann Deutsch 936."
Source: author's private family collection*

Domovinsko

The list of woodworking firms in Croatia from 1935 provided by Piškorić (1993, 142) contains the name of *Domovinsko* and its address (Zagreb, 8 Smičiklasova Street). Other information remains unknown.

Slavex

Although F. Körner misspelled the firm's name (*Slaveks*) on five glass plate (Photo 6) negatives dated 1934-36, we could trace its origins. According to the Croatian Technical Heritage Portal (2021), in 1890, thanks to French investments, the firm *Blau et comp.* was established in Brod na Savi (today's Slavonski Brod) that produced barrels. By the end of the year, the sawmill started with its work. Ten years later, the Hungarian firm *Holzindustrie AG* took it over, and it was renamed *Slavex* later. On the other hand, according to Švob (2010, 204) and CENDO – Research and Documentation Center (2020), it was the Jews who played a significant role in the economic development of Brod. In this context, the sawmill *Blau und comp* (1890) is mentioned as well as *Aktiengesellschaft Holzindustrie* (1900). The CENDO's text about the Jewish community (municipality) Slavonski Brod brings the explanation that the company's name: *Slavex* is an abbreviation from *Slavonische Exploitation*.



Photo 6: The negative with the inscription "Slaveks Josava I. 935-6"
Source: author's private family collection

Našička

When marking one of his glass plates negative with the name *Našička*, F. Körner used the short derived from its full name, *The Našice Tannin and Steam Saw Factory (Našička tvornica tanina i paropila)*. Its origins can be traced to 1866, when the sawmill was grounded in Đurđenovac (Photos 7 and 8).

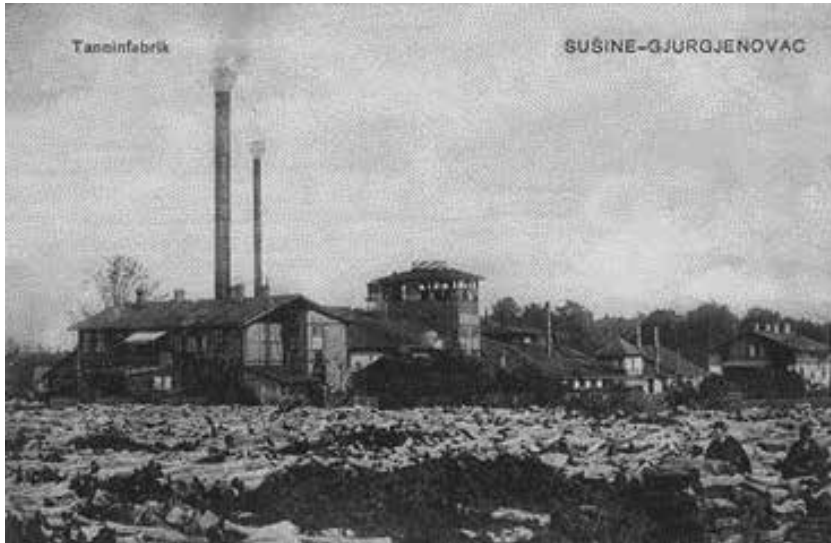


Photo 7. Tanin Factory in Đurđenovac

Source: <https://tehnika.lzmk.hr/dik-durdenovac-durdenovac/>

Photo: Advertisement from the "Forestry Journal" from 1934

Through the years, it changed its owners but developed strongly and rapidly. Under the name, the national joint-stock company was established in 1920 and associated later with its branches in Romania, Tchechia, Hungary, and Austria (Najcer Sabljak and Lučevnjak, 2004, 201) in the *Union des usines set des exploitationis forestireres de Nasic. s.a.*, of the leading international woodworking concerns. One of its plants was in Donji Andrijevc (Rajković, 2021, 201). When discussing woodworking companies in Croatia, Šimončić (1976) underlines *The Našice Tannin and Steam Saw Factory (Našička tvornica tanina i paropila)* and *Slavex* as a part of the group of the biggest wood producers but owned by foreigners.



Photo 8: Advertisement for "Našička" from the "Forestry Journal" from 1934
 Source: Šumarski list, Number 1, January 1934. p. 31
<https://www.sumari.hr/sumlist/193401.pdf>

Unfortunately, no data has been found about the last firm to which F. Körner provided his services, *Timber* from Zagreb.

Period of taking photos

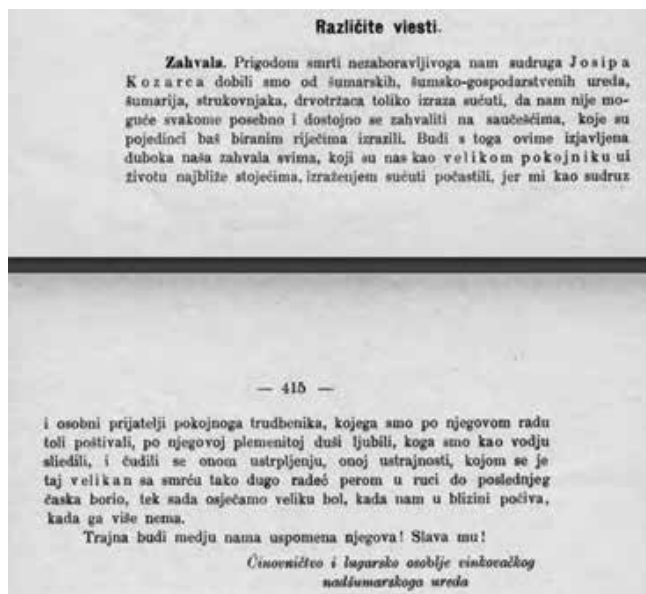
Most images were created from 1934 -1936, except for the only glass plate negative that differs in size. Remarkably smaller (9x11.5cm), the photo of the Ilijanska forest was taken later, in 1939-1940, without the buyer's name. To this period also belongs the image of *Timber* from the forest Paovo.

The power of words

Josip Kozarac (1858-1906), the Slavonian and Croatian writer, was known for his poems, stories, plays, and novels. Along with his love for the written word, Kozarac was deeply connected to nature: he studied forestry management in Vienna at the University of Natural Resources and Life Sciences. He graduated as the best student of his generation in 1879. As a forestry official, he served in different places in Slavonia¹⁰⁴ and wrote many

¹⁰⁴ The most substantial impact on Kozarac's private and professional life was a Slavonian village

professional papers. As Matić and Oršanić (2014, 17) state, Kozarac published 69 professional articles in Croatia and abroad. More importantly, he was one of the editors of “Šumarski list”¹⁰⁵, one of the world’s oldest, still-publishing forestry journals, from 1896 to 1898.¹⁰⁶ Furthermore, he was the first to explain the structure and composition of lowland forests and established the Croatian pedunculate oak forest restoration model (Hrvatska tehnička enciklopedija, 2019).



*Photo 9. Acknowledgment from “Šumarski list”
published after Kozarac’s death*

*Source: Šumarski list, Number 10 October 1906, pp. 414-415
<https://www.sumari.hr/sumlist/190610.pdf#page=3>*

named Lipovljani, where he spent ten years most productive. In his book “Lipovljani – in life and work of Josip Kozarac”, Matušek (1976, 5) tried to find the answer to the question of what could influence such a cold and rational painter of the disintegration of the Slavonian village, as Kozarac was, that he was unable to forget his years spent there. Matušek found the answer in three treasures: vast oak forests, the silence of pastoral life, and undisturbed mental satisfaction. In Lipovljani, Kozarac discovered his entire Slavonia with its beauties and troubles (Matušek, 1976, 5-6).

105 “Journal of Forestry” was established in October 1876 and is published by the Croatian Forestry Society.

106 Interestingly enough, Kozarac did not move to Zagreb, but stayed loyal to his home town Vinkovci, from where he edited the journal. According to Matić and Oršanić (2014, 18), Kozarac rejected the invitation to move to Zagreb permanently in a humorous way: “Move Zagreb to Vinkovci, and everything will be settled.”

After he died in 1906, “Šumarski list” published a text in which the Croatian-Slavonian Forestry Society members expressed their gratitude for the offered condolences and Kozarac’s immense professional contribution (Photo 9).

The call for the gathering of photographs published in the “Šumarski list” (1936) after his death speaks about the significant role he played in forestry. The invitation was based on the conclusion brought on the 1935 general assembly of the Yugoslav Forestry Association to sculpt the busts of two late eminent editors, Kesterčanek and Kozarac (Photo 10).

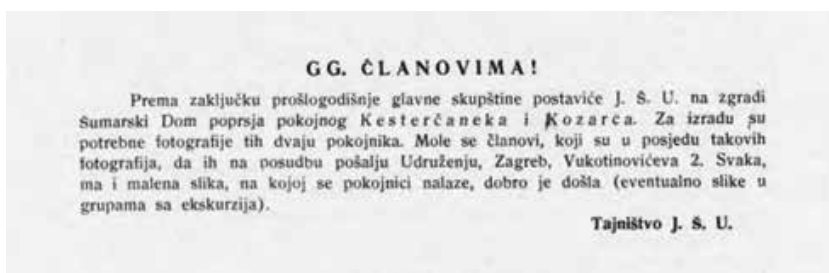


Photo 10. The call for the gathering of photographs of the late Mr. Kesterčanek and Mr. Kozarac

Source: *Šumarski list*, Number 2-4 February – April 1936. p. 203
<https://www.sumari.hr/sumlist/193602.pdf#page=139>

The last number of the “Šumarski list” published in 1936 brought a detailed report of the busts (Photo 11) unveiling ceremony and speeches held in honor of the two distinguished editors.¹⁰⁷

When reading Kozarac’s literary works and professional papers, the reader meets a true literary and forestry phenomenon: a diligent, gifted, and highly educated man who loves his homeland, especially Slavonia and its people, forests, villages, land farming – simply, everything that has to do with it (Matić and Oršanić, 2014, 18).

¹⁰⁷ Complete and full text of speeches held by Andrija Petračić, prof. dr. Josip Balen, dr. Mihovil Gračanin and dr. Ante Bonifačić are published pp. 678-685 Available at: <https://www.sumari.hr/sumlist/193611.pdf#page=66>



*Photo 11. The bust sculpted by E. Bohutinsky (Forestry House, Zagreb)
Source: <https://www.sumari.hr/kozarac/>*

His private and professional love for forests resulted in a brilliant short story, “Slavonian Forest” (printed in Zagreb in 1888). Štampar (1968, 161) calls it the incarnation of his scientific point of view, in which the sociological relations toward woods and nature are described. Unfortunately, rarely is Kozarac mentioned in terms of literary geography and the short story. No better characterization of “Slavonian Forest” can be found than in Hones’ statement (2010, 484) that “short fiction, as a genre, characteristically engages with the challenge of expressing the inexpressible: certainly, there is a story to be told, but that story is not in itself the point.” Furthermore, there is an outstanding example in the form of Bilić’s monograph “Literary geography of Slavonia – from the areal of farmers and “bećar” (2018). It is dedicated to the Slavonian landscape emphasizing literature geography as a subdiscipline of cultural geography. Unavoidably, Bilić discusses Kozarac’s “Slavonian Forest” in that context.

Conclusion

People's perceptions play a crucial role in defining the landscape, to Bressan and Guaran (2022, 201). Indisputably, the power of the Slavonian (oak) tree woods inspired and *empowered* both Körner's and Kozarac's oeuvres through their perception and representation. Still, today's trends in interdisciplinary research enabled us to picture the artistic forms in a new light following the traces of cultural geography, i.e., literary geography. Since the character of a landscape is the result of the action and interaction of not only its natural features but also human ones, distinctive elements can be traced thanks to digitized materials. By stepping into the field of new technologies, the Croatian Forestry Society has made it possible for its members and the entire forestry profession to access the extensive fund of scientific, technical, and historical information, which have for over 130 years been presented on the pages of "Šumarski list" (Meštrić, 2008, 554). Its texts and advertisements, news and other information, enabled us to shed new light on some aspects of Körner's and Kozarac's work. Hopefully, Körner's glass plate negatives, or as Caruso (2021) refers to them as "hidden gems", will be re-housed, conserved, and digitized one day. In this way, the digital capture of the negatives will provide robust image files that would serve almost any practical need from archive, production, and exhibitions, to database and web use.

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KULTURNA GEOGRAFIJA: STARI SLAVONSKI HRATICI

Sažetak

Rad donosi znanstveni uvid u povijest ljudske interakcije s okolišem. Naglasak je na slavonskoj (hrastovoj) šumi i njezinu iskorištavanju koje su inspirirale umjetnike i njihova djela. S jedne strane, riječ je o poznatom predratnom vinkovačkom fotografu Franji Körneru (1901-1945), čija je vrijedna kolekcija od 97 negativa na staklu slučajno otkrivena 2020. Za razliku od Körnera, jedan je drugi umjetnik – također iz Vinkovaca – rabio riječi kako bi iskazao svoju strast i ljubav prema slavonskoj (hrastovoj) šumi. Kao profesionalni šumar, Josip je Kozarac (1858-1906) napisao brojne pjesme, novele i romane inspirirane slavonskim krajolikom. Iz perspektive nove kulturne geografije, odnosno književne geografije, krajobraz nije samo materijalni artefakt koji pravolinijski reflektira kulturu, već je prepun simboličkih značenja koje je potrebno dekodirati u društvenom i povijesnom kontekstu.

Ključne riječi: književnost, kulturna geografija, negativni na staklu, slavonski hrastici

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BOURDIEU ON POWER, CULTURE AND SOCIOLOGY OF TASTE: THE CASE OF MARIJA JURIĆ ZAGORKA

Scientific paper
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Abstract

Refraining from reasoning in support of the universal taste and the experience of the beautiful, cultural sociology treats taste as socially contingent and constructed. The objective of this paper is to outline a social critique of different judgements of taste when it comes to different types of literary production based on the theoretical framework established by Pierre Bourdieu and on the example of the reception of popular literature, mainly historical romances written by Marija Jurić Zagorka. The methodological approach thereby applied includes the deconstruction of common distinctions based on Bourdieu's concepts of habitus, field and doxa, genealogy of highbrow taste in the era of so called highly textual modernism, critical analysis of gender discourse underlying cultural evaluations of literary production by women and for women, and the practicing of the ethnographic shift towards the reader in her context. This empirically contextualized analysis of literary tastes expressed by various recipients in Croatian cultural history has led to the results that reveal a long persistence of popularity and adoration of Zagorka's novels on the one hand and harsh, almost visceral, disgust with her production by official discourse on the other, confirming the thesis that judgments of taste are based on society (and class). However, these results do not suggest a linear (let alone causal) relationship between the class system and the system of cultural classifications as well as between consumerist desire and taste. Historical novels by Marija Jurić Zagorka, mainly written in the first half of the 20th century, contain a foundationally strong inscription of opposed social strata, thus providing a useful and relevant empirical basis for the analysis of complex processes of cultural modernization and accompanying changing forms of social power.

Key words: Bourdieu, popular literature, power, sociology of taste, Zagorka

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Bourdieu on taste and its sociology

Treating taste as socially defined is a *locus communis* in sociology (Gronow, 2000, 10). Different socio-economic groups have different tastes, and taste is consequently an empirical category. In his scientific reply to old questions of Kantian critique of judgement, Pierre Bourdieu (2011), perhaps unhumly, looks to the structure of social classes for a classification system that structures the perception of the social world and defines the objects of aesthetic pleasure, always thereby noting that social practices cannot be observed outside of their mutual relationships as well as of the totality of relationships. Bourdieu's approach thus presents an epistemological estrangement from the familiar world. Bourdieu's social critique of the judgements of taste argues that the taste of the upper class is presented as the only universal or legitimate taste in the spirit of Kantian critique. Sociological critique of *pure* aesthetics is particularly interesting, as it identifies the mechanisms of social emulation that constantly reproduce certain standards of good taste.

Such sociological critique of taste relies on the critique of modern consumerist society that explains the dynamics of consumption and the desire of modern consumers to surpass past or traditional ways of consumption via the desire to imitate upper social strata and to gain a higher social status. Still, although taste and consumption are unquestionably relevantly connected, we should not assume a direct causal relationship between the two, in the sense that taste would generate consumption.

Thorstein Veblen (2008) discussed the classical economic definition of consumption, according to which offer creates demand. Veblen painted a far more complex picture of consumption, warning about our instinct to emulate others and compete with them to ensure our own survival. With this, Veblen rejects the notion of maximization of utilization or consumption as the satisfaction of needs, realizing thereby that economy should understand tastes. People imitate those in a higher social position, which leads to the creation of certain habits and preferences, which in turn creates the impulse to consume. Veblen linked his thesis about taste as an economic factor with the neoclassical hypothesis on insatiability: the ones who can afford luxury find themselves in a better social situation, which means that buying luxury goods guarantees a good social status. This in turn creates the demand for certain goods that are not necessities but

are desired because of the prevailing taste of the richest classes. Still, the aristocratic scheme of taste and consumption through the imitation of the taste of monarchy or royalty changed when industrialization paced up the exchange of goods and lowered the prices, making the luxury of the previous era a weaker social status indicator. The era of mass consumption brought a new type of consumption and taste, characterized by intense consumption and changing fashion, which can no longer be accurately or validly explained based on social status alone.

Some claim that people are driven to acquire goods by hedonism rather than by a pursuit of status (Gronow, 2000). Bourdieu (2011) also speaks of hedonist ethics of consumption, based on taking loans and wastefulness, which are contrasted with the classical bourgeois dedication to an ascetic present that is sacrificed for the future. A new consumer is never satisfied but constantly seeks novelty and tries to meet the need to consume. Here arises the need to differentiate taste as an attribute or feature of the consumer (person or group) and taste as an activity (Hennion, 2007). Such a pragmatic concept of taste finds its critical strength in the fact that individual tastes cannot be observed in or by themselves, but only as physical acts (Arsel and Bean, 2013).

In classic theoretical sociological contributions, consumption, especially mass consumerism, was already critically seen as a sign of bad taste. German formal sociologist Georg Simmel (1957), for example, studied fashion as manifested in quick changes of taste. Fashion is, according to Simmel, a means to fortify the sense of unity of social classes and their distinction. Members of upper classes signalize their superiority and initiate new trends, but these trends get to be imitated quickly, they become popular, and thus lose their differentiating function.

In the 1920s, theorists gathered around the Frankfurt Institute of Social Research started to criticize the cultural industry as uniform and offering a quick but temporary satisfaction of needs according to the pattern of repetition (Katunarić, 1990). The taste of the mass audience was mainly criticized as a means of repression that does not offer aesthetic or cultural satisfaction. The Frankfurt school also linked the question of taste with social divisions in the community, opening the possibility of identifying certain types of class tastes, whereby class dynamics was understood as the mechanism of structuring taste.

Still, by far the most widely quoted theory of class-based taste is the one by French sociologist Pierre Bourdieu (1986; 1994; 2011; Slater, 1997), who identified distinctive class tastes of the French society in the 1960s based on the patterns of consumption and distribution of economic and cultural capital. The taste of the upper classes is seen as sophisticated and of subtle distinctions, giving intrinsic value to aesthetic experience. This taste forms a legitimate basis for *good* taste, legitimised and admitted by other classes (cf. Bennet, 1909). Middle-class taste on the other hand is characterized by the desire to compete in matters of social status. In contrast, the taste of the working classes is defined by the demand to choose necessities, not leaving much space for aesthetics.

Class theories of taste received substantial criticism, which argued that not every social action can be reduced to competition and that people, apart from the rat race for status, have other motivations, stating even that tastes and lifestyles can travel from the lower to the upper classes (Slater, 1997). However, neither the Frankfurt school nor Bourdieu treat the class-taste connection in a unilinear or monocausal way. Besides, the diffusion of the products of mass culture has made class differences less visible: products are consumed in a passive way in various social classes, with only small differences in brand or genre. The tastes of consumers are decreasingly under the influence of traditional social structures and are in postmodern culture seen as parts of the game with free floating signifiers that constantly redefine what they are and what they enjoy (Strinati, 2004).

In order to analyse the social critique of judgements of taste on the empirical example of Zagorka's popular literature, the focus of this paper is on the question of literary taste and the case of discrepant popular and critical reception of the works by Marija Jurić Zagorka. This requires a short recap of her work and life, provided in the following chapter.

Zagorka: adored and hated for a whole century

Her truly comprehensive opus and the circumstances of its publication and reception make Marija Jurić Zagorka a relevant figure in Croatian cultural history. Zagorka published for almost seventy years, from the late 19th to the mid-20th century: journal articles, articles about politics, fashion and culture, one-act plays, novels etc. (Lasić, 1986). Zagorka started

her career as a journalist, publishing her work in over thirty different journals and magazines in Croatia and abroad. She started the illustrated weekly *Zabavnik* (1918) and the first Croatian women's magazines *Ženski list* (1925-1938) and *Hrvatica* (1939-1941). After her first two novels, untypically gloomy *Roblje* (1899, instalments in *Obzor*) and *Vlatko Šaretić* (1903), there is a pause in her output until 1910, when the completely different crime novel *Kneginja iz Petrinjske ulice* was published. Here Zagorka develops and in a way rehearses her widely known narrative model and complex plot schemes that she playfully works with and that characterize her ensuing series of novels, which earned her great popularity. The novels include the series *Grička vještica*, starting with *Tajna krvavog mosta* in 1911, followed by *Kontesa Nera* in 1912, *Malleus Maleficarum* in 1912, two parts of *Suparnica Marije Terezije* and *Buntovnik na prijestolju* in 1918, and *Dvorska kamarila Marije Terezije* in 1926 as the seventh and final book in the *Grička vještica* series. Zagorka's other most popular novels include *Kći Lotrščaka* (1921), *Republikanci* (1924), *Plameni inkvizitori* (1928), *Gordana* (1934), *Kamen na cesti* (1937), *Vitez slavonske ravni* (1938), *Mala revolucionarka* (1939) and *Jadranka* (1943). There are thousands of pages that have never been published as books during her lifetime (*Tozuki*, *Crveni ocean*, *Vragoljanka s Trešnjevke*, *Pustolovine novorođenog Petrice Kerempuha* and *Nevina u ludnici*¹⁰⁹). Zagorka's one-act plays include titles like *Što žena umije* (1901), *U lovu* (1903), *Nesretna Ilica* (1903), *Ustrijelit će se* (1903), *Filip Košenski* (1904) and *Jalnuševčani* (1917). Zagorka's novels were also adapted for the theatre (*Grička vještica*, *Kći Lotrščaka*, *Suparnica Marije Terezije* and *Gordana*).

The above should be a sufficient illustration of the vastness of her opus. Imagining Zagorka produce these enormous amounts of text on a typewriter¹¹⁰ inspires a feeling of empathy from the modern viewpoint. Not only are the titles written by Zagorka numerous, they are also all enormously extensive novels. American magazine *mentalfloss* (Conradt, 2008) stated that *Gordana* is the sixth (out of ten listed) longest novel ever written. However, their list presents 9 out of 10 novels by their wordcount,

109 Published as a series of 112 feuilletons in Split (Slobodna Dalmacija's press) as the work of an anonymous author.

110 Zagorka bought a Remington typewriter, recently restored by Zoran Kirchhoffer and displayed at Zagorka's memorial apartment at Dolac 8 in Zagreb, where the Centre for Women's Studies has its offices today. The analysis of Zagorka's use of typewriter can be found in the paper by Sonja Kirchhoffer (2012).

and Gordana's length is expressed as 5200 pages – which leads us to the conclusion that the part called *Kraljica Hrvata* was probably left out, the last part of this huge novel originally published in instalments over a period of several years. The Guinness Book of Records mentions Proust's *In Search of Lost Time*¹¹¹ as the longest novel ever written, although it is only the fourth on the list by *mental*floss, but Gordana is still over three million characters longer. It is therefore highly possible that Zagorka's Gordana is the longest novel ever written.

Zagorka was exceptionally loved and popular, but at the same time faced bitter mockery and insults. Here are some examples of the dynamics of presence and adoration on the one hand and absence and contempt on the other. To illustrate Zagorka's popularity: there were long lines in front of newspaper stands, people waiting for them to open so they could buy a new instalment of her novel. The name of the award presented by the Croatian Journalists' Association, founded by Zagorka and her second husband, carries her name, as do many schools and streets (though since recently). Many reviews keep arriving at the conclusion throughout the 20th century that Zagorka is "again in vogue" (Hergešić, 1983, 399). Numerous publications of her novels also testify to her popularity. Hergešić (1983, 398-401) states that *Grička vještica* was published in 10,000 copies in 1963, and in an additional 10,000 as early as in 1964. A new edition of her collected works, the one that Hergešić wrote the preface to, was published in additional 10 to 15 thousand copies in 1972. In 1965, Bora Đorđević wrote a monograph-style story about Zagorka, and many of her novels were adapted for the theatre and television. The popular Zagorka received huge amounts of letters from her readers, and tourists would travel to Zagreb to see the grave of Nera, one of the most popular characters from her novel *Grička vještica* (Đorđević, 1979).

The conditions surrounding the publication of Zagorka's novel *Jadranka*, her last published novel, are an additional and powerful example of her vast popularity. During the period of the nationalist Independent State of Croatia, which shut down her women's magazine *Hrvatica* and took away the money from subscriptions, Zagorka was asked to compile a novel. She quickly gave them *Jadranka*, a novel written some twenty years earlier, to be published in the magazine *Nova Hrvatska* 1943-1945. The novel

111 <https://www.guinnessworldrecords.com/world-records/longest-novel>

is about German absolutism and the introduction of modern police in Croatia, the German *gendermerie*, and the carriers of the future German regime are treated with utter mockery in it, as complete incompetents. In other words, Zagorka made fun of the contemporary pro-German system in a novel that was commissioned by the very same system! Who can do that? Only someone who is “synonymous with popularity” (Kolanović, 2006).

Even today, more than a hundred years later, Marija Jurić Zagorka remains one of the most widely read authors: Školska knjiga published luxurious editions of her works in the early 2000s, and EPH has been selling paperback editions at newsstands since 2012. In an interview, the editor of the EPH edition said that nearly a million copies have been sold so far, significantly more, for example, than the copies of the *Songs of Ice and Fire*, despite the popularity of the *Game of Thrones* (it was published by EPH at the same time as Zagorka). Again, the proof of Zagorka’s lasting popularity! We can see that Zagorka’s fame and popularity has never waned in the homes of her readers.

In popular culture, Zagorka has been featured on television (in the documentary-feature film directed by Biljana Čakić Veselić, produced by FADE IN, HRT, Zagreb film in 2008), on stage (the play *Zagorka*, directed by Ivica Boban, premiered at the Croatian National Theatre in Zagreb on 28 January 2011; plays performed by the Histrioni troop), in comic books (biographic comic book by Lea Kralj Jager), in tourist tours and sites (famous monument in Tkalčićeva street in Zagreb by Stjepan Gračan, guided tour *Zagorkinim tragom*) and dance performances (*Excuse me, do you know where Marija Jurić Zagorka street is* by UPPU PULS, Zagreb and city theatre Zorin dom, Karlovac).

She gained additional visibility when Šime Strikoman photographed around 200 persons gathered at the Zagreb market Dolac, all named after characters from Zagorka’s novels (Gordana, Siniša, Nera, Stanka, Mirena, Jadranka, Dorja, Damira etc.), from Zagorka’s apartment. Zagorka introduced some of these names to Croatia for the first time, like Gordana, or Jadranka as the translation of Italian Adriana. In a symbolic sense, she gained even more visibility when the room intended for use by media representatives in the Croatian Parliament was named *The Marija Jurić Zagorka Journalists’ Room*.

A cultural event called the Days of Marija Jurić Zagorka was first organised in 2007 (in honour of the 50th anniversary of her death), and has since transformed into an annual event, including a scientific symposium about her life and work that takes place every year.

Strangely enough, her basic biographic data have only recently become known. Based on her christening certificate, we know that she was born on 2 March 1873, although her grave says 1 March 1879 (if that were true, she would have finished elementary school at the age of 5 and gotten married at 12). The referential website of the Miroslav Krleža Institute of Lexicography contained this incorrect date under the entry *JURIĆ, Marija (Zagorka)* until several years ago too (Kragić 2005). This is how the story of unknown Zagorka begins, to be continued by the mention of her numerous pseudonyms (M. Jurica Zagorski, Iglica or Petrica Kerempuh), which make the job of cataloguing and editing of her opus quite demanding. Also, the conditions of publication of her work, as feuilletons in newspapers, creates additional problems when the title of a novel changes, making it hard to put it together. These are some of the reasons why her biography and bibliography have not been fully systematized yet, although everything we do know about her inspires fascination and compassion. Her life was full of difficulties and abuse, starting with the abuse her mother subjected her to as a child, her forced marriage to a Hungarian railway officer when she was only 17, the experience of the psychiatric ward where she hid when she fled from her husband in Hungary, her imprisonment by Khuen Hedervary for organising demonstrations, and the insults she received from her highbrow cultured colleagues. They slandered her harshly, but at the same time used her popular writing to drive up the sales of their newspaper, insisting however that her name remains hidden and secret, like for example in the small attic room of the journal *Obzor*, where she produced texts as a kind of madwoman in the attic (cf. Gubar and Gilbert, 2000).

Zagorka could therefore be described as a *public secret* (Jukić 2012, 355). Let us compare the results of the ethnography of reading with official discourse. Namely, if you visit libraries in Zagreb and browse through their shelves, you will discover that Zagorka's novels are worn, torn, dirty, full of coffee stains and various marginalia – simply widely read! Some other titles, including canon and obligatory school reading list titles, remain neat, clean, and tidy for the most part. Passionately and widely alive in

the minds of her audience, Zagorka remained invisible in many official records. For instance, the entry for “Jurić, Marija” in the Volume 4 of the Encyclopaedia of the Institute of Lexicography (1959, 55) says “see Zagorka”, and the entry for “Zagorka” in Volume 7 (1964, 737) says see “Jurić, Marija”, making circularly invisible the author who is at the same time the writer of the most extensive opus in the history of Croatian literature and one of the most widely read authors throughout the 20th century (Nemec 2004, 651).

Apart from these encyclopaedic entries, the disgust for Zagorka can be inferred from the statements her esteemed colleagues made about her (cf. Lasić 1986; Jurić, 1997), describing her as an old lady with no name or reputation, or a peasant from Zagorje infected by socialist ideas and feminist novelties (by Šime Mazzura). In his journal *Agramer Zeitung*, Oto Kraus calls on the Zagreb audiences to finally reject this woman, who attacks everything that is noble and cultured in Croatia, and writes pulp fiction for cowgirls. Zagorka is frequently omitted, disputed, or aesthetically discriminated as yielding to the most vulgar and lowest of tastes (Nemec, 2004, 651).

However, there are instances of adoration, friendship, and support for Zagorka expressed by Masaryk, Strossmayer, Kranjčević, Antun and Stjepan Radić, Milan Hodža and Fran Supilo. Stjepan Radić explicitly asks *Obzor* to put Zagorka in charge of reporting about his political activities because of her professional journalistic qualities and moral attitude (Hergešić, 1983, 376). Even though politically opposed to Radić, Frano Supilo admired her too, claiming in his congratulations to her after she received and rejected a great offer from Pester Lloyd (for her political stories from the joint parliament in Budapest in 1906) that she is a really fine *man* (Hergešić, 1983, 376). Duboyer, a journalist from French *Figaro*, commented after seeing Zagorka advocate for her country during the Friedjung process in Vienna that she is a monster of talent and excellence that made Croatian Parliament one of the most advanced ones in Europe (Jurić Zagorka, 1953, 32).

To conclude this lengthy exposition of love and hate for Zagorka, she was neither unknown nor known. The dialectic of adoration and disgust expressed for her can be associated with different social circles and strata,

and this discrepancy is related to high and low tastes, which are relevantly mapped as gendered. The following chapter elaborates on this argument.

The power-culture nexus and its gendering

We have exemplified various tastes based on the reception of Zagorka's work, and pointed to the social generative place of different tastes: high-brow, learned, disinterested and pure art taste on the one hand, and low-brow, popular, vulgar, pulp taste on the other. Every aesthetic perception could be described as relational, historical and closely connected with ethical and political dimensions of our social beings. There is also a gender dimension to the discourse that values different kinds of literary production (Felski, 1995). The conceptual apparatus developed by Pierre Bourdieu (2011) (disposition, distinction, habitus, cultural capital) is useful in understanding this field and its history.

The assumption is that the ways of seeing and consuming cultural products lean against certain economic and social conditions, or in other words are tightly related to different possible positions in the social space, which makes them a part of the systems of characteristic dispositions (habitus) of different classes. Namely, taste classifies and at the same time classifies the classifier, which means that social subjects differ according to the differences they make between the beautiful or good and ugly or vulgar. Their position in objective classifications is manifested in these distinctions. Cultural consumption in a wider sense fulfils the social function of legitimating social inequalities. Oppositions inscribed in the habits of cultural consumption (of Zagorka's novels in this case) contain economic and social determinants and are manifested in other ways of living as well. They can all be brought into correlation with class and gender. Highbrow culture has a function in class relationships and its products tend to be seen as sacrosanct, autonomous, removed from daily needs, characterized by an accentuated form and denied an extra-literary function. To clear the aesthetic disposition means to forget that the definition of art and through it of the art of living are a part of the class struggle. The science behind cultural consumption must step over the border that turns high culture into a separate free-floating world, as if promoting it ontologically.

The critique of the negation of lowbrow and vulgar (which is sensational, gives pleasure, mostly to women and the vulgar *populus*), namely of the negation which includes the confirmation of the superiority of those who know how to consume and produce art in a sophisticated, free, and disinterested way. They create the so-called ideology of natural taste and of disgust that establish the unity of different classes in their daily struggle – which is why it is important to remember this when interpreting popular culture and popular romance written by a woman primarily for women in case of this paper.

As this interplay is a part of wider social power relations, it is worthwhile to note that power is no longer seen as productive or coercive, but as a part of discourse, in the habitus. This is how Bourdieu sees it too (Swartz, 1997). The notion of cultural hegemony is useful here too (Gramsci, 1971), as it is necessary to surpass the thesis of the dominant class ideology as well as the notion of subject as exclusively interpellated from a certain place in ideological conjuncture, i.e. from a certain position that determines what can and should be said (Althusser, 1971). Within a certain ideological discursive formation, a person's way of speaking is normatively connected to their position, because it is the source of their viewpoint, which is in turn the foundation of the way of speaking and is shaped by norms. Gramsci's notion of hegemony tries to go around the assumption that the mode of production has precedence over ideology. There is a distinction between coercive and consensual control, whereby hegemony presents a cultural and ideological tool for maintaining domination by securing spontaneous consent of the subordinate. This perspective enables a different view of the dynamic relationship between consent and resistance, here primarily referring to the consumption of Zagorka's popular literature.

Accepted negative views of popular culture and its harmful effects on entire society (Dremel and Matić, 2014, 160) can be applied to popular literature: it reduces cultural and artistic quality and genius, and the level of civilizational development (it is regressive), it is susceptible to totalitarianism as it creates manipulable audiences, and the character of the production of popular literature is led by the logic of profit and bad tastes of wide masses, raising passive and authoritarian followers (Strinati, 2004). However, gendered mapping of such divisions is often overlooked (Felski, 1995). At the first glance, this critique applies to Zagorka's literature – her representations are stereotypical, romantic love plays a big part, and

heroines often end up in happily married ever afters. The narrative structure is simplified and the same narrative model mostly perpetuated. However, if we take into consideration the context of her readers, we see that a story that seems naïve from today's perspective presented a significant breakthrough for a woman in the early 20th century in Croatia. Practicing the so-called ethnographic shift towards romance readers at the time (Radway, 1991) leads to the recognition that reading popular romances meant modernization for women because they started to read, even if the narrative relied on the patriarchal discourse. Pejorative views of popular culture fail to see the possibility of appropriating a certain discursive position – even if it is consumerist or patriarchal – with the purpose of mobilizing action and change. This can only be done if the discourse and the nexus of power and culture are conceptualized as social practices leaned against the notion of hegemony (Bourdieu, 1977). Even though Zagorka negotiates with the dominant discourse – she actually does something similar to what Spivak (1988) refers to as strategic essentialism or Luce Irigaray (1985) as mimesis – she does it in order to be able to act towards changing the meaning of gender roles and norms.

To see this type of strategy as naïve or antifeminist from today's perspective means to forget that literature has a live communication with its audience, as well as to forget about the real position of women in early 20th century – namely, women in Croatia did not read at all until they started reading Zagorka's novels. The act of reading itself had an empowering effect on women, which is Zagorka's contribution to the modernization and democratization of Croatian society.

In lieu of conclusion: new and old visibilities

In *serious* academic circles, the relationships between women and social change were not visible. Marija Jurić Zagorka, as the first woman journalist in the region, as a loved and hated novelist, critically disputed in spite of her popularity, is a neuralgic place of this invisibility. Her visibility has recently increased, which means that there is a shift in the orders of discourse (Foucault, 1971), though we should not forget that there is a political element to it as well. The recent move from social history to the history of the social, whereby foundational categories are examined,

is an important stimulus for revealing women's history, experience and perspectives.

The research approach followed here demands an autoreflexiveness regarding identity politics and binary distinctions we cannot escape – but the categories of gender or of highbrow/lowbrow were used here in order to critically analyze gender discourse within a specific regime of truth and power (Foucault, 1994), because it participated in the production and petrification of socially active divisions. The only claim thereby made about the nature of reality and society is that our knowledge of them is a part of discourse. Future research is therefore called upon to reveal discursive mythical constructs that both literary discourse and the discourse of social science theory rely on.

Popular culture was treated as the place of possible resistance and productive possession of many meanings. Although sociological theory tended to treat popular culture as passivizing and reactionary, we find this to bear monologist reading of cultural history and suggest a shift from the analysis of meanings of texts to the analysis of the social function of text and reader reception. Zagorka's novels are thus not necessarily places of system reproduction but can be seen as relevant modernizing agents for women and thus as places where both resistance and reproduction are at play. This is of great relevance for sociological theory too because sociology was established as the voice of fact versus literature as the voice of fiction. This is also one of the boundaries that modernity helped establish. The meaning of modernity can thus be interpreted as resting on the exclusion of gender via symbolic ascriptions. The analysis of Zagorka's reception has shown that if her reader is seen as a victim, one cannot see the important role of the figure of woman consumer in the imagination of modernity (Felski, 1995).

New disciplinary objectification of Zagorka and her opus can be useful in establishing new visibility of the role of female experience in the constitution of modernity. Although the social position of women has changed considerably, we can still witness resistant forms of inequality at home and in public discourse (Koludrović and Kunac, 2000), as well as unrelenting sexism and multiply intersected deprivation of women in Croatia (Galić, 2012). It is therefore useful to take the case of Zagorka into consideration when studying the processes of gendering history and history of gender in

the Croatian context. This research aspect is also important when we look into and try to disturb the still present normative hierarchies in theory, research and politics. Despite abundant criticism that Bourdieu received (Swarz, 1997), his theory of culture and power at its core is an intellectual project that boldly attempts to transcend the classic polarity between cultural idealism and historical materialism by proposing a materialist but relevantly non-reductive account of cultural life that embodies power relations.

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BOURDIEU O MOĆI, KULTURI I SOCIOLOGIJI: STUDIJA SLUČAJA MARIJE JURIĆ ZAGORKA

Sažetak

Zazirući od argumentacije koja propagira univerzalni ukus i univerzalno iskustvo lijepoga, kulturna sociologija tretira ukus kao kontingentan i konstruiran. Cilj je ova rada ocrtati društvenu kritiku različitih prosudbi ukusa po pitanju različitih tipova književne produkcije, na temelju teorijskog okvira Pierrea Bourdieua i na primjeru recepcije popularne književnosti, prvenstveno povijesnih romansi, koje je pisala Marija Jurić Zagorka. Metodološki pristup uključuje dekonstrukciju uvriježenih distinkcija na temelju Bourdieuove teorije kulturne reprodukcije, genealogiju visokog ukusa u doba modernizma, kritičku analizu rodnog diskursa u podlozi kulturnih evaluacija književne produkcije žena za žene i prakticiranje etnografskog zaokreta ka čitateljici u njezinom kontekstu. Ova empirijski smještena analiza književnih ukusa različitih recipijenata u hrvatskoj kulturnoj povijesti dovela je do rezultata koji otkrivaju dugu perzistenciju popularnosti i obožavanja Zagorkinih romana s jedne strane te intenzivnog, gotovo visceralnog, gađenja prema njezinoj produkciji u službenom diskursu s druge, potvrđujući tezu o društvenoj (i klasnoj) smještenosti sudova o ukusu. Ipak, ovi rezultati ne sugeriraju linearnu (kamoli kauzalnu) vezu između klasnog sustava i sustava kulturnih klasifikacija kao ni između potrošačke žudnje i ukusa. Povijesni romani Marije Jurić Zagorka, većinom napisani tijekom prve polovine dvadesetog stoljeća, sadrže fundamentalno snažnu upisanost društvenih slojeva, pružajući korisnu i relevantnu empirijsku osnovu za analizu složenih procesa kulturne modernizacije i pratećih oblika društvene moći.

Ključne riječi: Bourdieu, moć, popularna književnost, sociologija ukusa, Zagorka

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POWER AS THE FOUNDATION OF CULTURAL CAPITAL AND A PREREQUISITE IN CREATING THE VALUE OF AN ARTWORK

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Abstract

In his studious analysis of art in the context of its status and social function, French sociologist Pierre Bourdieu analyzed the problem of the distribution of power within the area that he refers to as the “field of art”. The habitus of the protagonists active in this field plays a decisive role in it, determining the perception of the value of artwork. The interests maintaining the field dynamics are essential elements of any field, making the field a battleground in which various interests battle for domination, nevertheless presupposing a consensus between the participants in the battle and their roles. Bourdieu, like Weber, believes that any social action is based on the interests of social protagonists, because no one will engage in something that has no material or ideal value and does not include a certain motive or profit, which does not necessarily have to be economic. Furthermore, aesthetic conflicts in the field of art often have a political dimension and are merely an embellished form of the battle fought in order to impose the dominant vision of the social reality on others. The field is an imaginary space where the real social power is generated. It is superior to the concept of institution, because institutions imply consensual relations within the society, while the field also includes phenomena that are not institutionalized or defined by firm boundaries at the given moment. The objective of this study is to analyze the role of critics and other protagonists in the field of art in the process of shaping values in visual arts, and to show the importance of power in the formation of symbolic capital in a broader cultural context. For the purposes of this research, the author will use the methodology that Bourdieu applies to literature in his book *The Rules of Art*, whose main theses help us better understand the economic, symbolic and cultural relationships in the fields of visual arts, with an emphasis on the situation in Croatia after the war.

Keywords: Bourdieu, art criticism, cultural capital, power, artwork

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On the significance of Bourdieu's "field of arts" and Danto's "world of art"

In a series of his texts, especially in the study *The Rules of Art: Genesis and Structure of the Literary Field*, French art sociologist Pierre Bourdieu tried to explain the relationship between art and social movements using the sociological method. The methodology Bourdieu uses to analyze the literary field represents a model of scientific research practice applicable to any social field. Pierre Mounier observed that Bourdieu primarily explores and analyzes how the literary field achieved its autonomy "as a specific field" (with its capital, its agents, and its specific stakes) in his book. After achieving this, it was officially established as a literary field, because it had previously not existed in such a complete and structured form. It is obvious that this is a case study, which means that a certain number of properties, or (to use the term used by this sociologist) 'rules' of the field are valid in all fields, and especially in the field of cultural production, the category to which the literary field belongs" (Mounier, 2001, 59). Through his study and analysis of the literary field and the writers and works that shape it, Bourdieu provided a methodological pattern applicable to the analysis of any other field. It should be recognized that Bourdieu's analysis was primarily based on the structure of French literature of the 19th century and that the functioning of art and theory changed significantly in the following century, especially in the visual arts. Changed forms of artistic expression, the emergence of new media, a different approach to artistic production, the problematization of the traditional aesthetic understanding of an art object, as well as numerous other circumstances, required a redefinition of concepts.

The first significant terminological problems arose with the historical avant-gardes in which the theoretical thought of romanticism experienced its practical realization. Not long after, a new turbulent epoch appeared as part of the strengthened neo-avant-garde practices in the 1950s, especially under the influence of the New York art scene. Along with Clement Greenberg, Arthur C. Danto was among the most notable theorists who understood the importance and tried to rationally understand and explain the logic of new movements in the field of aesthetics. In his 1964 essay *The Artworld*, Danto pointed out that earlier aesthetic theories could not adequately explain the new movements within the art world. He believed

that sometimes, as observers, we do not have to be aware that what we are looking at is an art object, because we do not know the specific theoretical base that would confirm this to us (Danto, 1964, 572). In order for something to be seen as art, sometimes it is not enough just to notice an object or a gesture, because the reason for the existence of the artistic dimension does not have to be recognized by our eyes, and can lie in the “atmosphere of art theory, knowledge of art history”, that is, in what Danto calls the *art world* (Danto, 1964, 580). The artistic character of an object therefore sometimes depends exclusively on interpretation. For this reason, it is undeniable that a potential interpreter must have a broad knowledge of art history and theory. It is the theory of art and the knowledge of the historical context that can transform things from their mere ordinariness into the realm of art, and thus determine the difference between a urinal and Duchamp’s “Fountain”, or between a “Brillo box” and an art object that Warhol made from Brillo boxes (Danto, 1964; Danto, 1997).

On Bourdieu’s concept of the field

The foundation for Bourdieu’s analysis of the concept of the field starts from the questioning of the efforts of the main character Frédéric in Flaubert’s novel *Sentimental Education*. Frédéric is an example of a character in whom the ambivalent idea of the incompatibility between two worlds – the world of art and the world of money – breaks down. One is represented by the experience of artistic activity out of pure love, and the other is based on profit (Bourdieu, 1995). Frédéric embodies this first segment of love for art that cannot be reduced to money or any other interest. It is, therefore, about the larparartistic ideology (Bourdieu, 1995). In the book *Distinction: A Social Critique of the Judgment of Taste*, taking into account Panofsky, he concludes that nothing happens when encountering a work of art that could be explained by the concept of love at first sight. The act of knowing someone’s work is a much more complex operation of “unraveling, decoding, which includes the application of cognitive heritage, cultural competence” (Bourdieu, 2011, 6). In addition, Bourdieu pays a lot of attention to the relationship of power factors between different fields and the way it is distributed in society.

In the article *Cultural Capital and Symbolic Power – Three Aspects of Bourdieu's Theory of Ideology*, Nenad Fanuko shows how the basic concepts of his theory derive from three sources. These are the sociological systems of Max Weber, Karl Marx, and Emile Durkheim (Fanuko, 2008, 10). Bourdieu explains the concept of field relationally since, according to him, the basis of the social world is made up of objective relations that are independent of the consciousness and will of individuals. The field is not a lifeless space consisting of a set of empty positions but represents a game area that can only function if there are players “who believe in the stake and actively strive to achieve it” (Fanuko, 2008, 10). In addition, he defines the field as a social stage on which habitus operates (Fanuko, 2008). The concept of habitus helps to understand the relationship with the perception of values, because “the ‘eye’ is a product of history that is reproduced through upbringing” (Bourdieu, 2011, 7). Upbringing is closely related to education, that is, the school system and its capital. Bourdieu devotes a large part of his analysis of *Sentimental Education* to the field of literature founded around 1880 in France, in whose shaping Gustave Flaubert and Charles Baudelaire played a substantial role (Bourdieu, 1995). Certain interests that maintain its dynamics are an integral part of every field, so every field is a “stage where interests battle for dominion, and all fields assume the consensus of the participants of the battle about the roles in it” (Fanuko, 2008, 15). At the base of this understanding is Weber’s thought that every social action is based on the interests of certain social actors, since no one will commit to something that has neither material nor ideal value and does not include a specific motive and profit. Bourdieu emphasizes that he is not referring exclusively to economic interest and monetary gain, so he extends his economic calculation to symbolic goods in which symbolic capital is registered. Protagonists in each field have a certain interest that is not exclusively of an economic nature. Aesthetic conflicts in the field of literature often have a political dimension, and are only an embellished form of the battle that is fought to impose a dominant vision of social reality. For this reason, Bourdieu rejects economism as the basis of the dynamics of the field, setting the basis for the elaboration of the distinction between the artistic and economic fields, viewing them as two opposites. In the artistic field, economic interests are completely reversed, because it emphasizes the disinterestedness of action. However, disinterestedness in the artistic field only implies the absence of economic interests,

while they are very much present symbolically. “In a game where it is necessary”, Fanuko points out, “to be ‘disinterested’ in order to succeed (as in the artistic field, where ‘authenticity’ is opposed to ‘commercialization’), the protagonists will spontaneously act disinterestedly in accordance with their interests” (Fanuko, 2008, 16). As an example, Bourdieu cites two professors in the scientific field who will fight for their own theory, perhaps even at the cost of death, regardless of monetary or other profits.

Analyzing the relationship between the artistic and economic fields, Bourdieu comes up with another important concept of “political economy of the symbolic” – cultural capital. Cultural capital means language competence, general cultural awareness, aesthetic preferences, information about the school system, educational certificates, and the like. In addition to cultural capital, Bourdieu mentions economic and social capital. Economic capital can be directly converted into money and become institutionalized as a form of property rights. In the case of cultural capital, the process of conversion into economic capital is limited by certain conditions, and it can be institutionalized in the form of educational competencies and qualifications. The last capital, the social one, consists of social obligations and can also under certain conditions be converted into economic capital and institutionalized in the form of noble titles. Finally, to these three types of capital, Bourdieu adds the form of symbolic capital, whose characteristics take on the three previously mentioned when they are perceived and recognized as legitimate. Capital becomes symbolic “only when it is unrecognized in its arbitrary truth as capital and recognized as legitimate. On the other hand, this act of (false) knowledge and recognition is actually an act of practical knowledge, which in no way means that the known and recognized object is set as an object” (Fanuko, 2008, 17). Although its foundations are derived from Marx’s theses, Bourdieu’s concept of capital is not based on the Marxist idea of exploitation of surplus value. Economic capital is at the base of all capital, since any other capital can be converted into it, which ultimately made it difficult for Bourdieu to distance his theory from Marxist economics. Conversions from one form of capital to another are not always of the same character, and Fanuko observes that individual capitals do not even function at the same level of sociality (Fanuko, 2008).

The French sociologist believes that there are no objective economic conditions that must be met in order to wage a battle for the acquisition of

profit in the field of art or literature, because economic profit is not the primary motive for engaging in art or literature. Financial support does not contribute to better status in the field, nor to faster acquisition of symbolic capital. Nevertheless, even within these fields, there are artists and writers who, in their pursuit of economic capital, adjust their production to the requirements of institutions that seek to legalize them at all costs in order to get capital themselves. It is rare for an artist and writer to gain symbolic capital in this way, because only the recognition of competent professional colleagues can provide it. In his capital study *The Western Canon*, literary historian Harold Bloom highlights only those writers who have already secured symbolic capital with their works or are likely to secure it in the near future. When he mentions previous writers and current writers who deliberately read them in a distorted way, he means powerful writers belonging to tradition whose works already have a confirmed symbolic value, and their strong successors who give them recognition and are competent. Picon very clearly describes this relationship using the example of Mallarmé and Joyce, calling them Promethean writers who write for an audience “to whose creation it will contribute” (Picon, 1965, 24). Art for the sake of art, therefore, can now also be characterized as art for the sake of the artist/successor, because inventive and original writers do not necessarily have to be original, but only need to know what they can borrow and how to skillfully revise it (Slabinac, 2006, 178). From this comes Bloom’s thesis that the canonization, i.e., the legalization of artistic/literary values, belongs exclusively to the field of art or literature, and not to something outside that field, as the members of the *school of resentment* thought. Bloom will therefore defend the interests of the text, which is exclusively an aesthetic fact which does not have value in itself but acquires its value status through constant conflict with other aesthetic facts (Slabinac, 2006).

Symbolic capital and its endangerment

The relationship between symbolic and economic capital is quite complex. Symbolic capital is just as important as economic capital because every activity, especially of economic nature, must be presented as legitimate. A group of individuals-specialists whose task is to monitor, develop and transmit the status culture contribute to the autonomy of the field. In the

field of visual arts, they include curators, critics, gallerists, editors of cultural magazines, and cultural columns in various media, collectors, and others. Outside that segment are the artists themselves. Bourdieu most often speaks of them as producers rather than artists because “the value of the work of art is not produced by the artist but by the field of production as a world of belief that produces the value of the work of art as a *fetish*, creating belief in the creative power of the artist” (Birešev, 2007, 191). Producers are specialists, but there is also a rivalry between them. The constant conflict between established actors and newcomers contributes to the vitality of the field. At the same time, those with greater status power try to completely appropriate the specific capital of the field, using the strategy of conservation and defending their dogmas. In contrast, new actors, who possess less capital, are more inclined to practice subversive strategies. The aesthetic outlawry of the newcomers forces the dominant class to act and shape the defense mechanism of orthodoxy, because it is in their interest to maintain and defend the integrity of the *doxa*, while the newcomers try to push the boundaries of this established *doxa* through direct rebellion or deliberately distorted reading. In mid-19th century, French society looked with approval at the bold transgressions that French writers committed in their works. Even if this approval could not be immediately measured in terms of adequate monetary profit, the market still provided a certain form of social recognition to individuals and groups that exceeded the demands of the bourgeois market by their actions. According to Bourdieu, the cultural revolution that occurred in the field of art and literature in the 1830s was possible because the great heretics could count, if not on full support for their activities, at least on the attention of all those who entered the field of art and literature and through their own formation in that field accepted that all options are possible within it. “Therefore, it is clear”, according to the author, “that the literary and artistic fields were constituted as such in opposition and because of opposition to the *bourgeois world*, which has never before so cold-bloodedly imposed its values and its tendencies to control the instruments of legislation in the fields of art and literature, and which now wants to impose a degraded definition of artistic production through the press and their tricks” (Bourdieu, 1995, 58).

The gradual revolution of symbolic capital led artists towards liberation from bourgeois demand, giving neither the buyer nor the market

legitimacy when deciding on the artistic value of a work. Artists could not defeat the bourgeois system in the battle over the control of the meaning and function of the work of art without eliminating the bourgeoisie itself from that struggle, i.e. the market system in which the bourgeoisie determines the price and demand without taking sufficient care of the supply. However, not all members of the bourgeois class can be viewed in the same way. Among the talented bourgeoisie, as well as the traditional nobility, there are also those who preferred and continued to cultivate aristocratic predispositions, alienating themselves from the demagogic declarations of the proclaimers of the so-called social art. Being “equally blessed with economic and cultural capital, writers from a central position in the very heart of the field of power, as sons of doctors or members of the intellectual and liberal professions (...), it seems that they were destined to occupy a corresponding position in the literary field” (Bourdieu, 1995, 86). The ruling social structures have never initiated major revolutionary movements since they have no problem with the existing order and are “usually condemned by their living conditions and destined for routine literary practice, and unable to provide troops equal to the heretics or those who are the guardians of the symbolic order” (Bourdieu, 1995, 111). Revolutions were initiated by members of unclassified milieu who, thanks to their aristocratic predispositions – and often privileged social origin – were the owners of great symbolic capital (like Baudelaire and Flaubert) and as such supported a deep intolerance of borders, whether social or aesthetic. In the period studied by Bourdieu, the hitherto unique literary field (and the same applies to the artistic field) begins to be organized in opposition between two independent principles. On the one hand, there are opposition writers who deal with “pure” production intended for producers – other writers and those whose aesthetic taste has been more refined, while on the other hand there are those who meet the demands of a wider audience.

Members of the oppositional, decadent artistic movement often came from the working class or belonged to the petty bourgeoisie and were not blessed to a large extent with cultural capital like, for example, members of the much bigger bourgeoisie, which was greatly influenced by the possibility of receiving an education (Bourdieu, 2011). Avant-garde writers and artists who had not yet acquired a privileged status, especially those of a biologically older age, had even more motivation to achieve the success

and recognition that younger avant-garde artists could obtain based on a long-term oppositional position towards the bourgeois order. Furthermore, Bourdieu claims, “I can rely on the fact that, although bourgeois commitment and economic profit or the momentary honors that mark them (*Academie*, prizes, etc) go primarily to writers who produce for the bourgeois and consumer markets, they also affect the conformist segment of the most dedicated avant-garde” (Bourdieu, 1995, 123). The growth of the market was also a key factor, since it determines the vitality of the artistic and literary fields. The increase in the number of cultural producers who could earn a living with their pen by doing the jobs offered by numerous cultural companies was linked to the increase in the number of potential readers who were ready to accept novelties and originalities in the field they were interested in. With painters, the situation was somewhat different. Having crossed paths with the ideals of the academy and the demands of the bourgeois class, they had to search for a different conception of the termination and acquisition of autonomy that was prepared in the field of literature with romanticism. The idea of art for art’s sake, which introduced new laws into the economy of the symbolic values of goods, i.e. works of art, helped transformed painters in their work on ethical and aesthetic transformation (Bourdieu, 1995, 136). Thus, the painters’ long-lived desire for liberation from even the most neutral and eclectic patronage revealed the possibility and showed the necessity of shaping a cultural production that carries within itself the principle of its own existence, freed from external influences and prohibitions.

Previously, there was already talk about the dominant and subordinate participants of the field and the way in which their antagonism affects the vitality of the field, because these are places of antagonistic coexistence of two modes of production and circulation in which the universal logic of relations is respected. At one end of the artistic and literary field stands the anti-economic economy of pure art, based on the recognition of the value of disinterestedness, which lacks commercial and economic profit that can be obtained in the short term. This cultural production, which cannot recognize any demand other than the one it can create, is nevertheless aimed at the accumulation of symbolic capital in the long term, which under certain conditions ensures economic profit in the future. Against this production stands the economic logic of the art and literary industry, which prioritizes distribution and temporary success and is content with

adapting to the existing demand of the clientele. The first described model shapes and creates the market for the future by anticipating its symbolic capital, while the second model serves the existing market (Bourdieu, 1995, 142). The first model needs not only artists, but also critics who will appropriately introduce new art into the area of demand and ultimately strengthen its symbolic capital. Avant-garde critics (but also gallerists and curators) are dedicated to the function of discovery, which often makes them spokespersons for artists and art, and, in accordance with their status, they are opposed to institutions such as the academy and museums. The task of such actors in the field is to skillfully highlight the connection between tradition and the moderate innovation of contemporaries and to justify the deliberate misreading of predecessors so that the work does not cease to be the subject of educational institutions *in principio*, given that the educational system recognizes a monopoly only for works from the past and for producers and intermediaries who have a degree, while new practices are often approved post mortem and after a long process that ends only in the most fortunate cases with canonization and inclusion of works in curricula. Economic capital cannot guarantee other specific capitals as well as subsequent economic profit, which often comes only with time, unless it is transformed into symbolic capital whose goal is not economic profit. It is a legitimate accumulation of capital, both for the author and critic as well as for the curator, publisher or director. The work on shaping a recognizable name is the basis of dedication in the field, and the dedication of a name implies the power to consecrate objects or people through a sign or signature, which ultimately contributes to making a profit.

In this context, Bourdieu also addresses the issue of the institutionalization of art, which was exhaustively dealt with by estheticians of the analytical line such as Arthur Danto and George Dickie. Dedicated authors strive to impose their dominance in the field in which they operate because their tendency is to enter the market. The solutions they provide are becoming more and more common and acceptable because constant encounter with them replaces the process of long-term familiarization through an institutional framework. This is hindered by respectable consumers of recognizable products, because the appearance of new and different producers often means the shaping and perhaps the imposition of new tastes, as a result of which a number of producers, works of art

and systems of taste are relegated to the past on the market, and there are changes in the hierarchization of their degree of legitimacy. It should not be ignored that in addition to artists, there are other actors within the artistic field who help discover and consecrate the artist or preserve the status of existing valorizations, namely critics, writers of forewords and introductions, publishers, dealers, curators. So, for example, curators, critics, directors or gallerists are people who are inseparable from the field. They take advantage of the artist's work, but they also raise its symbolic value by placing it on the market through exhibitions, publication or installation and ensure its possible sanctification. And according to Bourdieu, "the commitment will be greater, the more committed the trader himself is" (Bourdieu, 1995, 167-168). Bourdieu argues that the dedicated artist who discovers something does not discover anything that at least some other artists have not already discovered.

Attempts to shape the symbolic capital in Croatian visual art – example of the Venice Biennale

In Croatia, the problem of market formation is very long-standing, and the roots of this problem go back to the time of communist Yugoslavia. After the 1950s, there was no organized market system because the understanding of private property was based on the Marxist model. The state was the most common buyer of works of art, as confirmed by exhibitions of annual art purchases, which were managed by eminent, but mostly regime-friendly, art historians such as Vladimir Maleković or Grga Gamulin. The power of cultural policy was in their hands, and they decided what would represent valuable and high-quality Croatian art both at home and at international fine art fairs. More contemporary – and in a certain sense more problematic new artistic practice, based on the poetics of neo-avant-garde currents – remained mostly on the margins of the field of visual art. With the independence of the Republic of Croatia, things began to change because the state's attitude towards market relations changed, but even in the 1990s there was no stronger development of the art market. With the appearance of a few collectors whose affinity was more directed towards modern painting, there were no significant changes in the market domain, and the institutions, their directors and curators continued to strongly influence the distribution of power within the field.

Zvonko Maković, Tonko Maroević and Igor Zidić imposed themselves as intellectual authorities for the first half of the 20th century, striving to point out the European quality and value of Croatian modernity.¹¹³ The power of private gallerists and collectors was very limited, with the exception of the later appearance of the collections of Marinko Sudac or Tomislav Kličko, who had the help of curators with whom they worked to try to shape new valorization interpretations of the art they collected.

In addition to being forced to deal with the problem of appropriating a part of the power within the field for a long time, private gallerists did not have enough power and knowledge to appropriate a part of the monopoly over symbolic capital, so their role in the economic capital of the field depended on other factors as well. In the field of mass media and publishing, the situation was very similar. In addition to the terrible lack of media space for visual art in regular television news shows and daily newspapers, most of the texts about art could be found in specialized magazines such as *15 dana* (published since 1957), *Zarez* (published in print 1999-2016), *Vijenac* (published by Matica hrvatska), *Art Magazin Kontura* (since 1991), *Fantom slobode* (since 2003) or the recently founded magazine *Nemo*, which is published electronically. In addition to HRT's (national radio-television) very short programme *Vijesti iz kulture*, which prioritises the presentation of well-known and popular names of Croatian and international art, HRT 3 offers a large number of specialized shows on culture that are usually watched only by experts in the field. The contribution of these shows is certainly not negligible when it comes to the segment of non-economic development of art and its symbolic potential. It is understandable that the media aspect of the artistic field largely depends on the affinities of the editors because they decide which aspect will be emphasized, so their power in building symbolic capital is very great. On the other hand, the ideological orientation of certain media houses also affects the selection of what will be put in focus. One of the more pronounced examples of such editorial policy can be observed in the work of Patricija Kiš Trebovac from *Jutarnji list*, who, thanks to the readership of this daily newspaper, has a significant power in the selective presentation

113 In recent years, the Art Pavilion in Zagreb has hosted a series of exhibitions from the collections of Croatian collectors, where one could very clearly see which preferences are dominant in their selection of exhibits that they want to have in their private collections.

of current artistic movements in which quality and symbolic potential are put on the back burner.

The strength of the media in the field of visual arts in Croatia is very weak. The main lever of power in this context is held by two apparently opposing camps, which in practice are quite intertwined. On the one hand, there are directors and curators of larger museum and gallery institutions, and on the other hand there are non-governmental associations, i.e. civil society associations with a whole range of curators and experts in culture like BLOK, Kontejner, WHW etc. Although their *modus operandi* is quite different and somewhat opposite, within the framework of the Croatian cultural scene, they are strongly intertwined, and it is not uncommon for the same individuals to participate in parallel in both segments of cultural policy. The positive side of this situation is that they share the same aspiration towards certain symbolic values which, through institutionalization, are starting to get a certain economic equivalent. However, the downside of such built relationships is the generation of identical values of symbolic capital, which over time leads to the homogenization of valorization and ideological preferences and tastes. The formation of symbolic capital, therefore, is largely connected with the aesthetic ideology of individuals who have power in the field. The last editions of the Venice Biennale showed that Croatian representatives are increasingly striving to be represented by strong curatorial names from the Croatian scene or curators with international references. Artist Kata Mijatović presented herself at the 55th Venice Biennale with the project “Between Heaven and Earth”, which she designed with curator Branko Franceschi. At the next biennale, Damir Očko presented himself with the exhibition “Trembling Studies: The Third Stage”, curated by the French critic and curator Marc Bembekoff. The 57th Venice Biennale was curated by Branka Benčić (an independent curator at the time) with the project “Horizon of Expectations”, in which Tina Gverović and Marko Tadić were involved. The last two biennials are also signed by foreign curators, more precisely female curators. In 2019, “Traces of disappearance (in three acts)” by Igor Grubić was curated by Katerina Gregos, while at the 59th biennial the project “Untitled (Croatian Pavilion) 2022” by Tomo Savić – Gecan was curated by Elena Filipović, who is also the director of the Kunsthalle in Basel. The example of the Venetian presentations of Croatian artists shows how important it is that, in addition to the work of art itself, in the process of

its symbolic establishment, a number of significant participants from the field who possess the competence to shape the symbolic capital of works and artists and determine their status in a canon of visual arts should be included. The term canon is important because phrases like “canonical lists” and “objective valorization” are highly debatable and are formed due to the relationships that exist within the artistic field between actors who participate in it according to their own interests.

It is difficult for most literary experts to accept the increasingly widespread thesis about the relativity of literary values. Kant seems to have opened this Pandora’s box quite unintentionally. The solution was sought in the works of analytical aestheticians who at least partially tried to return to the objectification of literary values. Monroe Beardsley can be considered the originator in this area. In his work *Aesthetics: Problems in the Philosophy of Criticism*, he offered a middle ground between objectivity and relativism – the instrumentalist theory. According to the proposed understanding, “aesthetic value depends on the range of experiences that the aesthetic object arouses, or more precisely, on the range of aesthetic experiences that can be aroused, from the point of view of three main criteria, namely the *uniqueness*, *complexity* and *strength* of the potential experience” (Compagnon, 2007, 288 as cited in Beardsley, 1981, 529). Beardsley believed that these three criteria are sufficient for an objective evaluation of a literary work, that is, every reader can use them to logically conclude that one work is more valuable than another. However, even with Beardsley, the problem of establishing those three models remains. Even if it is accepted that *uniqueness* and *complexity* enter the objective domain, the question of *strength* still remains largely reserved for each individual.

At one point, the concept of time imposed itself as a very good ally in the conflict between objectivity and the relativity of artistic values. It was based on the fact that time will give the final verdict on the question of the quality of artwork. If it is truly valid, it will be studied and inspiring for a hundred years, and if it succumbs to the passage of time, it will be difficult to accept the thesis of contemporaries about its extraordinary quality. Numerous works of light or trivial literature, which are extremely popular and widely read in the beginning, lose the battle with time, and very few remain as legacy for generations to come. Goodman was also aware of this fact, admitting that most of the works of art were of extremely poor quality (Compagnon, 2007, 263). Hans Robert Jauß also accepted the future

as a valid criterion for assessing literary value. However, the problem with the inclusion of the concept of time in the parameters of determining the artistic value of an individual work lies in the fact that the artistic field needs to valorize a certain object or the artist's entire opus *hic et nunc* in order to determine as soon as possible its symbolic capital, which in market circumstances could begin to produce economic capital as well.

Conclusion

In his research on art, sociologist Pierre Bourdieu developed a very stimulating methodology for the study of different artistic fields, which is applicable not only to the period that Bourdieu himself focused on, but also to later movements in the field of the art world, especially after the development of the capitalist arrangement of the market system. Bourdieu perceives works of art as goods that possess a certain capital. However, he considers the concept of commodity to be a much broader term than, for example, Marx. For this reason, the French sociologist emphasizes the difference between different types of capital – economic, cultural, social and symbolic – already in his early analyses. Although all capitals are reducible to economic ones, money is not the only driver that operates within certain fields, especially when it comes to artistic and scientific ones. In this text, emphasis was placed on Bourdieu's analysis of the field and the relationships that prevail within it. Although he himself did not strictly deal with the field of fine or visual arts, the methodology he developed analyzing the literary field can be applied to this field as well.

The objective of this paper was to reflect on the role of curators and critics in shaping the field of visual arts, as well as to analyze their role in gaining and distributing power within the field. Within the framework of the Croatian visual arts scene, power is still traditionally distributed within institutions and its diversification is decided by curators and critics who managed to obtain their privileged status within the field and acquire a monopoly over the distribution of different types of capital. Using the example of the last few editions of the Croatian pavilions at the Venice Biennale, an effort was made to show the attitude of Croatian artists towards their own position within the field. Since the segment of market relations still does not contribute to a more favorable relationship between

symbolic and economic capital for the artist, the tendency of artists is to participate in market relations outside the borders of their own country, which is much simpler in the field of visual arts than, for example, in the field of literature. Finally, in the last section of the paper, using the example of canon analysis, an attempt was made to show that the monopoly of individuals and certain ideologies often has no direct connection with the objective value of a work of art, so that symbolic capital is often left to the phenomenon of time, which only in the future crystallizes a model of potential objectification of value whose objectivity is always woven into the relations between individual actors of the field and depends on them.

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MOĆ KAO BAZA ZA KULTURNI KAPITAL I PREDUVJET U STVARANJU VRIJEDNOSTI UMJETNIČKOG DJELA

Sažetak

Pri studijoznim analizama umjetnosti u kontekstu njezinoga statusa i društvene uloge, francuski sociolog Pierre Bourdieu osvrtao se na problematiku raspodjele moći unutar područja koje naziva “umjetničkim poljem”. U polju presudnu ulogu ima habitus aktera koji u njemu djeluju te određuje percepciju vrijednosti umjetničkog predmeta. Esencijalni su dio svakog polja interesi koji održavaju njegovu dinamiku pa je ono pozornica borbe različitih interesa koji unatoč svemu pretpostavljaju konsenzus između sudionika borbe i njihovih uloga. Tu se Bourdieu oslanja na Weberovu misao kako je svaka društvena akcija zasnovana na interesima nekih društvenih aktera jer se nitko neće angažirati za nešto što nema bilo materijalnu bilo idealnu vrijednost te u sebi ne uključuje određeni motiv i profit koji nužno ne mora biti ekonomske prirode. Nadalje, estetski konflikti u polju umjetnosti nerijetko imaju političku dimenziju te su samo uljepšani oblik borbe za nametanje dominantne vizije društvene realnosti. Polje je imaginarni prostor u kojem se generira stvarna društvena moć. Ono je superiornije od pojma institucije jer institucije podrazumijevaju konsenzusne odnose u društvu, dok polje obuhvaća i pojave koje u tom trenutku nisu institucionalizirane te određene čvrstim granicama. Cilj je istraživanja analizirati ulogu kritičara, ali i drugih aktera umjetničkoga polja u procesu oblikovanja vrijednosti vizualne umjetnosti te prikazati u kolikoj je mjeri moć važna pri formiranja simboličnoga kapitala u širem kulturnom kontekstu. U ovoj analizi autor će se poslužiti metodologijom koju Bourdieu u djelu *The Rules of Art* primjenjuje na područje književnosti, a čije osnovne teze pružaju mogućnost za bolje razumijevanje ekonomskih, simboličkih i kulturnih odnosa u područja likovnih i vizualnih umjetnosti pri čemu će naglasak biti na stanju u poslijeratnoj hrvatskoj umjetnosti.

Ključne riječi: Bourdieu, kritika, kulturni kapital, moć, umjetnički predmet

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COMPUTER AND INFORMATION LITERACY – A TOOL FOR ACHIEVING THE POWER OF NURSING PROFESSIONALISM IN GENERAL HOSPITALS

Scientific paper
<https://doi.org/10.59014/XXUS2914>

Abstract

According to Weber (1999), power is the probability of achieving a desired goal through social relations and is not necessarily related to coercion. There are several types of power, including the power of professionalism, which refers to the possession of certain knowledge, skills and competences. In this context, nursing holds the power of professionalism in relation to healthcare because it possesses specific knowledge, skills and competencies. Computer and information literacy can be a tool to increase this power by providing better patient care. This paper will examine whether computer and information literacy increases the efficiency and effectiveness of nursing, to what extent it reduces and speeds up the administrative work, whether nurses and technicians are satisfied with the formal education they have received in this context, what are the existing curricula like, and what else could be included to improve them. A self-assessment questionnaire regarding computer and information literacy was used for the purposes of this paper, which also includes a review of the available literature and an analysis of the existing secondary school and university curricula. The research showed that computer and information literacy helps achieve the power of professionalism. Also, the results indicate that it is necessary to introduce new content into the curricula related to computer and information literacy, and practice lifelong learning in this area.

Keywords: computer and information literacy, curricula, lifelong learning, nursing, power

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Introduction

According to M. Weber's definition, power is the probability of carrying out one's will in a social relationship despite the resistance of others, regardless of what this probability is based on. The application of the power of professionalism in nursing in general hospitals in the Republic of Croatia will be discussed below, bearing in mind the social relationship (health worker-patient) and the probability of materializing one's will in this social relationship based on knowledge, competences and skills. Computer and information literacy of healthcare workers (Hoffman, 2020; Špiranec, Banek Zorica, 2018; Eisenberg, 2008) implies the practical application of the knowledge and skills related to the use of information and communication technologies (ICT) that were learned in the course of one's education. It is the basis for effective communication with patients and the basis of successful communication of information to stakeholders in the healthcare system. If the level of communication is satisfactory, as a result of the knowledge and skills of health professionals, professional standards in the field of health care can be achieved. Computer literacy means knowledge of ICT, while information literacy means the application of ICT when recognizing important information, accessing it, processing it, storing it, structuring it (putting information in relation to each other) and sharing information with others. This paper focuses specifically on computer and information literacy in the context of creating the power of professionalism in the field of nursing. The objectives of the research were (Marković, 2021):

- to determine to what extent the power of professionalism is related to the information literacy of nurses in general hospitals in the Republic of Croatia, and whether the increase in the level of information literacy influences the reduction of the amount of administrative work in favour of health care
- to conduct an analysis of curricula and programs at all levels of formal education of nurses in the field of computer and information literacy in the Republic of Croatia in order to determine the actual situation related to the acquisition of the power of professionalism in computer and information literacy.

Bearing in mind the objectives of the research, the following hypotheses were formulated:

1. Information literacy enables nurses to gain the power of professionalism in providing quality health care through shortening administration.
2. Increasing the power of professionalism through information literacy of nurses is achieved by adapting nursing curricula and ensuring lifelong education in this area.

Through the research, the hypotheses were examined by studying the literature and conducting a survey related to the fulfilment of information literacy standards, and a survey by which nurses self-assessed their own computer and information knowledge. Below is an overview of the methodology, followed by a description of the research, a presentation of the results, and the discussion. The conclusions drawn from the research are presented in the end.

Methodology

The research spanned several phases (Marković, 2021):

- The basic research terminology and the questions for the self-assessment of knowledge and skills related to information literacy were identified through the analysis of literature related to computer and information literacy (Abunadi, 2018; Association of Higher Education and Research Libraries, 2013; Australian and New Zealand Institute for Information Literacy Adelaide, 2004).
- The analysis of the curricula provided a picture of the knowledge and skills related to computer and information literacy. The analysis determined which content related to computer and information literacy is included (Croatian Chamber of Nurses, 2017; Domitrović, 2016; Directive 2005/36/EC; Directive 2013/55/EU; Association of Higher Education and Research Libraries, 2013).
- A detailed study of information literacy models and standards was conducted. With the development of the process of information literacy, numerous models and standards that aimed to explain or interpret information literacy were distinguished (Working group of SCONUL for information literacy, 2018; Croatian Chamber

of Nurses, 2017; Domitrović, 2016; Bolek, Kokles et al., 2016; Association of College and Research Libraries, 2013; Adelaide Australian and New Zealand Institute for Information Literacy, 2004). Mandatory content of professional development curricula and programs in information literacy was suggested, building upon the analysis of curricula and the answers obtained in the surveys. By studying the model of information literacy, a theoretical framework based on scientific work was defined in all segment of the research (Špiranec, Banek Zorica, 2018; Abunadi, 2018; Project “The New Literacy Set” 2015-2017. EU Project” Erasmus +”, 2016; Meuleenmester, 2015; Association of Faculty and Research Libraries, 2013; Nursing in Croatia towards EU accession, 2011; Lloyd, 2010) in order to define the level of information literacy which could be raised to increase the power of professionalism in the field of nursing.

Research, results and discussion

The research was performed in the second half of 2020, and resulted in the following findings (Marković, 2021):

Survey analysis focused on computer and information literacy standards in nursing

Since the Republic of Croatia does not have its own standard related to information literacy, the Computer and Information Literacy Standards developed by the Association of Higher Education and Research Libraries (ACRL – Association) were used for the questionnaire of College and Research Library) – “Task Force on Information Literacy Standards for Nursing,” 2013 (ACRL, 2013). It consists of five groups of indicators (ibid) related to the outcome on the basis of which the level of information literacy can be measured, namely: the ability to define the need for information, the ability to effectively collect the necessary information, the choice of research methods and the application of search strategies, the ability to critically evaluate information and sources information, the effectiveness of using information to achieve goals, how much the nurse

understands ethical, legal and socio-economic issues related to information and communication technology.

Sixty-nine ward nurses and their substitutes filled in the questionnaire. The aim of the questionnaire was to get the respondents to assess their own computer knowledge. The surveys were distributed to heads of departments, following the assumption that due to their job description, they mostly deal with administrative work and use ICT (they possess certain IT skills). The structure of respondents according to qualifications was as follows: 31 respondents with secondary education, 25 with higher education and 13 with university education.

The scale for evaluation was as follows: 1-33% respondents are not computer and information literate; 34-66% respondents are partially computer and information literate; 67-100% respondents are computer and information literate. Observing the criteria of age, professional qualifications, job complexity and self-assessment of IT knowledge, the results presented below were obtained.

Table 1. Fulfilment of the information standard literacy

Criterion	Group	Compliance with standards (%)	Number of respondents	The result
Age	20-29	54.98	17	partially
	30-39	42.72	18	partially
	40-49	29,16	16	insufficiently
	50 and more	17.33	18	insufficiently
Qualifications	Secondary school qualifications	29.83	31	insufficiently
	Two-year university qualifications	37.66	25	partially
	Four-year university qualifications	39.18	13	partially
Complexity of business	HIGH	41.14	18	partially
	SECONDARY	26.67	51	insufficiently
Self-assessment of knowledge	BELOW AVERAGE	12.98	7	insufficiently
	AVERAGE	39.37	15	partially
	ABOVE AVERAGE	28.99	27	insufficiently

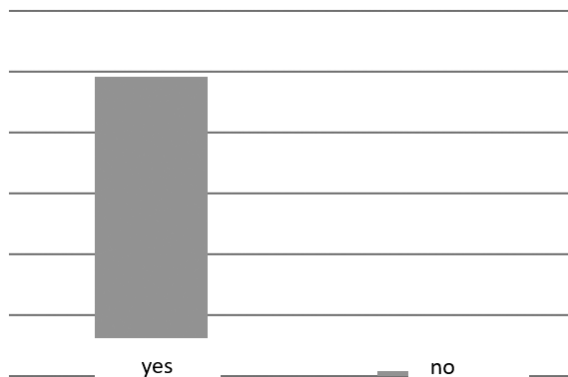
Source: author's research

Table 1 shows the results of meeting information literacy standards according to age, professional training, job complexity and self-assessment of ICT knowledge. The obtained results (ibid) confirm that faster changes are necessary in the process of formal education, because no age group has a sufficient level of computer and information literacy. The relationship between the age of the respondents and computer and information literacy is as expected. Younger respondents are more computer and information literate because the application of information and communication technology comes natural to them (they have always used it), while the older respondents do not possess a sufficient level of literacy because ICT was not included in their education process. Regarding the professional qualifications, it is evident that the level of computer and information literacy increases with the level of education, i.e. professional qualifications. This result is expected, because nurses with higher professional education do more administrative tasks for which they have to master ICT. The greater the complexity of work, the greater the need for specific knowledge and skills. The complexity of the job correlates with professional training. As a rule, a higher professional qualification goes hand in hand with greater complexity of the work, and nurses who do more complex jobs meet the standards to a greater extent (they have a higher level of computer and information literacy). The results of knowledge self-assessment show that nurses overestimate their ICT knowledge. Namely, it is evident that the respondents who believe that they have an above-average knowledge of ICT barely pass the threshold of sufficient literacy, while those who believe that they have average knowledge actually do not have a sufficient level of computer and information literacy. The obtained results prove that the research on computer and information literacy in the field of nursing is justified, because no results were obtained according to any criteria that would show that the respondents had a sufficient level of computer and information literacy. Moreover, research shows that even in those cases where they have a partial level of literacy, they barely exceed the 30% threshold.

Survey analysis aimed at self-assessment of information literacy

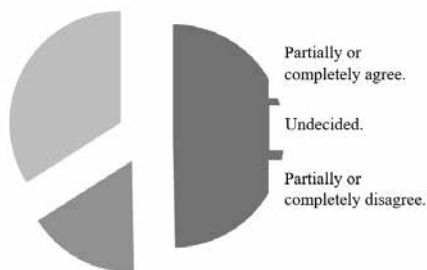
The results of the research on information literacy according to literacy standards in nursing justify further research regarding the level of

information literacy of nurses with regard to age, level of education, job complexity and self-assessment of ICT knowledge. The above is necessary in order to identify problematic areas of literacy and to propose activities to improve literacy (and thereby increase the power of professionalism in the field of nursing). The research was conducted by a questionnaire in four general hospitals in the Republic of Croatia (Marković, 2021). The survey was conducted in a Google form. Nurses participating in the survey had secondary school qualifications (254), two-year university qualifications (194) and four-year university qualifications (114). The answers to the survey confirm the hypotheses, as evidenced by the data presented below. Answering the question *Do you use a computer at work*, 98.2% respondents said yes, and 1.8% said no.



Graph 1. *Do you use a computer at work?*
 Source: Author's research

Answering the question *How do you assess the complexity of your job*, 0.8% respondents said “low”, 47.8% said “medium”, and 51.3% said “high”. Answering the question *How do you assess your IT knowledge*, 7.1% said “below average”, 79.4% said “average”, and 13.5% said “above average”. Answering the question *If you use a computer, do you spend too much time on administration compared to providing health care*, 49.7% respondents partially or completely agreed with the statement, whereas 16.3% were undecided.



Graph 2. *If you use a computer, do you spend too much time on administration compared to health care?*

Source: Author's research

Only 26.9 % respondents completely or partially agreed with the statement *Does knowing how to work with the hospital information system leave you more time to work with patients*. Answering the question *Does the automation of business processes speed up your administration (writing nursing documentation, patient records, conducting therapy)*, only 19.4% respondents partially or completely agreed with the statement. Answering the question *Do you think that you need continuous education in the field of application of information and communication technology*, 77.7% respondents said *yes*, and 22.3% said *no*.



Graph 3. *Do you think that you need continuous education in the field of information and communication technology application?*

Source: Author's research

Answering the question *Do you think that the knowledge in the field of information literacy that you acquired through formal vocational high school and/or higher education is sufficient to perform your job*, respondents answered negatively, stating that they believe that they did not get enough knowledge about information literacy during their formal education.

All the answers point to the need to increase the power of professionalism related to the use of ICT and computer and information literacy, either through formal education or through lifelong learning.

Analysis of nursing education in the Republic of Croatia (curricula and programs)

The second hypothesis was confirmed by the analysis of the national guidelines that are required for defining the curriculum (Marković, 2021). The analysis resulted in a recommendation for a concrete curriculum regarding the improvement of the level of information literacy. The quality of curricula and programs in secondary, higher and high education institutions for nurses was evaluated according to the following criteria: European Computer Driving License (ECDL), i.e. knowledge of office tools, e-mail and the internet for computer literacy; compliance of curricula with national guidelines; and the number of hours in subjects related to computer and information literacy against the total number of hours.

The analysis of the curricula of four secondary schools and higher education institutions resulted in the following findings: there are subjects dealing with computers in the above levels of education for nurses, and they are in line with the national guidelines (generally the content is too technically oriented and does not fit the needs of the nurses in their daily work); nursing schools do not have guidelines and therefore specific curricula are not uniform; in all three levels of education, elements of information literacy are completely missing or there are only elements of them.

Due to the lack of subjects related to information literacy, the author recommends introducing information literacy content into the education system based on the so-called ACRL (Association of College and Research Library) standard, either as a separate subject or as an interdisciplinary course, in order to increase the professional power of nurses in the field of information literacy. By introducing content related to information literacy (Rašidović, 2019), pupils and students would be trained for

independent learning and knowledge-building using distributed sources of information. At the end of the courses, the participants are expected to acquire the competence to independently access and browse information sources of analogue, digital and virtual origin in any form and format. Learners should be able to find, process, evaluate, study and manage relevant information. They should be able to analyze information, synthesize, organize, interpret and present it in order to responsibly create new knowledge through studying for tests, writing essays, presenting and submitting seminars and final papers. Therefore, they would increase their professional power related to information literacy.

Conclusion

The study of the sources revealed that information literacy implies the following skills: searching for information, advanced searching for information, organizing information, understanding text, using information, analyzing and creating graphs, evaluating information, creating structural information, creating online information, usability of information, intellectual property, data protection, and the use of social networks. The aforementioned knowledge is conducive to increasing the power of professionalism in nurses, which will lead to better healthcare, reduced consumption of unnecessary medical material and drugs, minimization of damage caused by incorrect treatment, improved focus on the patient, and follow-up possibilities and improvement of the quality of health care. Evidence for the statement that computer and information literacy of nurses increases the power of professionalism is provided through the research of information literacy standards as well as through the self-assessment of computer and information literacy of nurses. The results of the aforementioned research show that nurses do not meet all standards of information literacy, that they spend too much time on administrative tasks, and that they have not learned information literacy skills in course of their formal education (which was determined by a study of specific curricula in four secondary and higher education institutions). Therefore, they do not have sufficient power of professionalism in the segment of computer and information literacy. In order to realize the power of professionalism in the segment of computer and information literacy, it is necessary to: introduce a teaching program related to information literacy as a separate subject

or as an interdisciplinary course; for nurses who did not have a subject related to computer literacy in their formal education, it is necessary to introduce lifelong learning courses in the subject area; it is also crucial to improve the existing curricula in computer literacy. The research presented in this paper confirms the set hypotheses. Namely, if nurses increase the power of professionalism in the computer and information literacy segment, they will be more efficient in administrative work and have more time to provide healthcare. In addition, the conducted surveys related to the fulfilment of information literacy standards and the self-assessment of computer and information knowledge confirm the insufficient level of development of the power of professionalism in the segment of computer and information literacy through formal education, and stress the need for lifelong education.

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RAČUNALNA I INFORMACIJSKA PISMENOST – ALAT ZA POSTIZANJE SNAGE PROFESIONALIZMA SESTRINSTVA U OPĆIM BOLNICAMA

Sažetak

Prema Weberu (1999), moć je vjerojatnost postizanja željenog cilja kroz društvene odnose i nije nužno povezana s prisilom. Postoji nekoliko vrsta moći, uključujući moć profesionalnosti koja se odnosi na posjedovanje određenih znanja, vještina i kompetencija. U tom kontekstu, sestrinstvo ima snagu profesionalizma u odnosu na zdravstvenu njegu jer posjeduje specifičnosti znanja, vještina i kompetencija. Računalna i informacijska pismenost može biti alat za povećanje ove moći pružanjem bolje skrbi za pacijente. U ovom radu ispitati će se povećava li se računalna i informacijska pismenost učinkovitost i djelotvornost sestrinstva, u kojoj mjeri smanjuje i ubrzava administrativni posao, medicinske sestre i tehničari zadovoljni su formalnim obrazovanjem koje su stekli u tom kontekstu, kakvi su postojeći nastavni planovi i programi te što bi se još moglo uključiti da se oni poboljšaju. Za potrebe ovog rada korišten je upitnik za samo procjenu računalne i informacijske pismenosti, koji uključuje i osvrt na dostupnu literaturu i analizu postojećih srednjoškolskih i sveučilišnih nastavnih planova i programa. Istraživanje je pokazalo da računalna i informacijska pismenost pomaže u postizanju snage profesionalizma. Također, rezultati upućuju na potrebu uvođenja novih sadržaja u nastavne planove i programe koji se odnose na informatičku i računalnu pismenost te prakticirati cjeloživotno učenje u ovom području.

Ključne riječi: računalna i informacijska pismenost, nastavni planovi i programi, cjeloživotno učenje, sestrinstvo, moć

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