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New and old aspects
of sustainable development
and business ethics

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**Interdisciplinary theoretical and empirical studies
No. 2**

New and old aspects of sustainable development
and business ethics

**edited by
Aleksandra Kuzior**

Zabrze 2018

Business Ethics and Sustainable Development
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Aleksandra Kuzior

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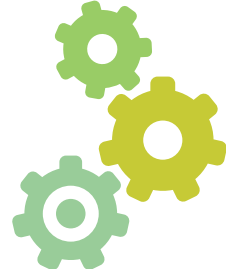
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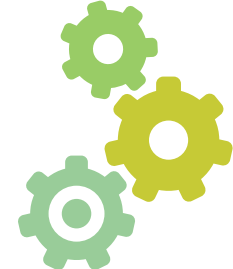
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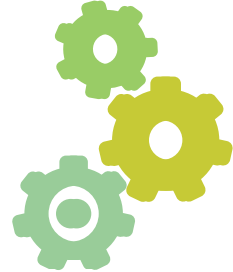
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Introduction

I present to the readers the next issue of the magazine „Business ethics and sustainable development. Interdisciplinary theoretical-empirical studies „, containing articles presented at the II International Congress of Business Ethics and Sustainable Development in Rybník in May 2018, and articles prepared for the „Debiut Naukowy 2018 - Zrównoważony rozwój” competition.

The participants from Poland, Slovakia, Ukraine and Switzerland attended the 2nd International Congress of Business Ethics and Sustainable Development. This issue includes the articles from Slovak guests.

Pavel Fobel in his article argues that ethical knowledge is now an important prerequisite for professional work and effective implementation of ethical tools. Ethics creates an appropriate framework for implementing good practices in enterprises and institutions, and thus builds a good reputation of the organization in society. All you need to do is prepare the right ethical tools and skillfully implement them.

The article by Daniela Fobelová was devoted to the problem of corruption. To deal with this problem, we need to implement systemic legal, economic, political and ethical solutions. An important role in the fight against corruption is played by organizational culture, if it is properly configured and supported, it can be an effective mechanism for ethical support and promotion of good practices and counteracting corruption. Promotion of the ethical culture in the organization has been written in the ISO 37 000 standard, to which the author refers and indicates ways to build the ethical culture of the organization.

Monika Klimentová Fobelová from the non-profit organization Centrum of Applied Ethics from Banská Bystrica states in her article that the risk of violation of ethical values applies to all business environments. Therefore, she postulates constant monitoring of the assessment and implementation of remedies in Slovak companies.

Daniela Kovaľová from the University of Matej Bel in Banská Bystrica evaluates the technological progress in the field of biotechnology from the perspective of applied ethics. She indicates that new technologies have double potential. On the one hand, they solve many civilization problems, but on the other hand they can also pose a serious threat to sustainable development. To avoid unnecessary risks, it is necessary to act with due care.

Daniela Kováčová also from the University of Matej Bel in Banská Bystrica writes about the crisis in the humanities, indicating that we are currently witnessing a radical underappreciation of the humanities. Humanities are depreciated both in education and in life. Meanwhile, there is no doubt that they should be a complementary component of economic and technical sciences. Turning away from humanistic values causes a re-emergence of anti-Semitism or nationalism and fueling hatred. The author argues that humanities are the key pillars of democracy, they also influence sustainable development.

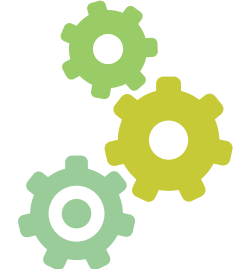
Lukáš Moravec deals with the issues of work as an important pillar of human life. He draws attention to the change in the nature of work and expectations related to the work process from both the employers and employees. The subject matter of the work is shown by the primacy of the concept of sustainable development. The author draws attention to an important aspect of the work related to social contacts and a way to self-fulfillment. In the context of progressive automation and robotization of production, these autotelic values of work may be at risk due to lack of work.

Eva Pechočiaková Svitačová from the Slovak University of Agriculture in Nitra, Slovakia deals with selected aspects of globalization and focuses mainly on the need for integration, responsibility for a sustainable future, as well as on the new shaping of the relationship between economics and ethics.

Other articles Vadim Efremov, Olha Sadlovska, Mateusz Lisak, Liliia Hrytsai, Zarina Kudabayeva, Piotr Sieniawski relate to various aspects of sustainable development and are the aftermath of the competition organized for the ninth time by the offices of a Member of the European Parliament, prof. Jerzy Buzek. The organizational side of the competition is Dr. Henry Kretek. The competition is important mainly because it allows young people to appear in the scientific community and gain experience in order to design their further academic career.

I invite you to read the articles contained in this volume.

Aleksandra Kuzior



Bartosz CZAUDERNA¹

Adaptive Management in Context of Sustainable Dam Development

Abstract

The author explores research done on sustainability and brings it towards the aspect of hydrotechnical investment. Hydrotechnical investments are ventures that have significant impact on the environment, society and economy. However, they are very often contested due to their unknown real costs for stakeholders. To better understand their cost, they must be properly evaluated. The goal of the research is to confront the existing knowledge in the literature and analyse the value of dams in the sustainability context, providing tools for evaluation of the dam in different stages. Comparing the current status of the literature, author analyses the context of the sustainability of dams and creates a conceptual model that connects their evaluation with dam life cycles by implementing adaptive management based on Stakeholder Theory. Using the proposed model for projects would build a base for further development and decision-making, providing sustainable development for future investments.

Key words: Sustainability, Dams, Hydrotechnical, Investments, Value, Developing Countries, Adaptive Management, Competition, Stakeholder Theory

¹

Zarządzanie adaptacyjne w kontekście zrównoważonego rozwoju tam

Streszczenie

Autor bada zagadnienie zrównoważonego rozwoju oraz sprowadza go do kontekstu hydrotechnicznych inwestycji. Hydrotechniczne inwestycje są przedsięwzięciami, które znacząco wpływają na środowisko, społeczeństwo oraz ekonomię. Jednakże ich

¹ Uniwersytet Jagielloński, Wydział Zarządzania i Komunikacji Społecznej.

opłacalność jest kwestionowana z uwagi na nieznane realne koszty dla interesariuszy. Aby lepiej zrozumieć strukturę kosztów muszą podlegać odpowiedniej ocenie. Celem badania jest analiza wartości tam w kontekście zrównoważonego rozwoju za pomocą narzędzi do oceny tamy w jej różnych etapach rozwoju. Porównując obecny stan literatury autor analizuje kontekst zrównoważonego rozwoju tam oraz tworzy model koncepcyjny, który łączy ocenę projektów hydrotechnicznych z żywotnością tamy poprzez wprowadzenie zarządzania adaptacyjnego opartego na teorii interesariuszy. Używanie proponowanego modelu dla inwestycji hydrotechnicznych stworzyłoby bazę wiedzy służącą do ewaluacji procesu decyzyjnego przy podejmowaniu tych inwestycji oraz ich dalszego zrównoważonego rozwoju.

Słowa Kluczowe: Zrównoważony rozwój, Tamy, Hydrotechniczne Inwestycje, Wartość, Kraje rozwijające się, Zarządzanie Adaptacyjne, Konkurencja, Teoria Interesariuszy

Introduction

Sustainability is a broadly explored concept. The author explores research done on sustainability and brings it towards the aspect of hydrotechnical investment. Most of the research done on dams is empirical²; however, there exist limited conceptual works for hydrotechnical constructions.³ Much research is conducted on the safety and reliability of dams based on analysis of cost and profits⁴. Most of the research methods used are case studies researching influence on society, ecology, and economy or different stakeholders. The most common case is conducting research directly at an affected region, which is also presented in this work.

Hydrotechnical investments are ventures that have significant impact on the environment, society and economy. However, they are very often contested due to their unknown real costs for stakeholders. To better understand their cost, they must be properly evaluated. Hydropower has been the leading source of renewable energy across the world, accounting for up to 71% of this supply as of 2016. Most of these hydroelectric projects were built between 1920 and 1970 in North America and Europe. However, big dams stopped being built in developed countries because the best sites had already been used and the associated environmental and social costs had made them less popular. With the lack of such infrastructure in these countries, investors found alternative locations that were less sensitive to associated environmental and social impacts.

² Halkos G., Assessing the economic value of protecting artificial lakes, 2012, Online at <https://mpra.ub.uni-muenchen.de/39557/> MPRA Paper No. 39557, posted 20. June 2012 13:46 UTC.

³ Palmieri A., Shah F., and Dinar A., Economics of reservoir sedimentation and sustainable management of dams, „Journal of Environmental Management”, 2001, t.61, no 2, pp. 149–163.

⁴ Beacher G., (1980), Risk of dam failure in benefit-cost analysis, Water Resources Research 16(3), June

Investing in hydroprojects in developing countries carries the same recurring issues: disrupting river ecology, losing biodiversity, releasing substantial greenhouse gases, displacing thousands of people, and altering people's livelihoods, plus affecting the food systems, water quality, and agriculture near them. Innovative sustainable solutions are required to meet the world's demand for energy, water availability and food security around the globe. In many cases, dams in developing countries are very often the easiest way in the short term to provide such measures. The goal of the research is to confront the existing knowledge in the literature and analyse the value of dams in the sustainability context, providing tools for the evaluation of the dam in different stages of its life cycle.

Through years of hydroproject investment development, there have been numerous cases that have been evaluated, providing good practices to create a product that will not only answer basic needs but create added value, becoming not only the short- but also long term-best sustainable solution. By comparing the current status of the literature, the author analyses the context of the sustainability of dams and creates a conceptual model that connects their evaluation with dam life cycle by implementing adaptive management. Using the proposed model for projects would build a base for further development and decision-making, providing sustainable development for future projects.

Sustainability and Management

In 1987, the Brundtland Commission defined sustainable development as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs." It is based on two main concepts – the concept of "needs" where the essential needs of the world's poor require a priority for development and the concept of limitation that is enforced by technology and social organization on the environment's ability to meet present and future needs.⁵ In order to ensure sustainable development, both the output of the economy and the underlying resource that gives rise to it have to be sustained. The goal of development should be to raise the standard of living while avoiding uncompensated future costs.⁶ The exploitation of renewable energy resources and technologies is a key component for sustainable development. By having a lower impact on the environment, being unlikely to deplete it and supporting locally applicable solutions, such exploitation becomes a desirable formula in different areas.⁷

Introduction of the sustainability concept has had a significant influence on different areas. In the practice of management, it aroused controversy, challenging existing theories. The development of different methods and strategies such as TQM, benchmarking, and

⁵ World Commission on Environment and Development (WCED), 1987. *Our Common Future* Oxford University Press, Oxford, UK.

⁶ David Pearce, *BLUEPRINT 3 measuring sustainable development*, 2013. Earthscan, UK

⁷ Dincer, I. (2000). Renewable energy and sustainable development: a crucial review. *Renewable and Sustainable Energy Reviews*, (2), 157–175

reengineering brought operational improvements, but rarely have these gains translated into sustainable profitability, as their value was focused on building competitive advantage⁸. Eventually, one of the most influential theories in the sustainability context came to be R. E. Freeman's theory of stakeholders. It is a major approach in social, environmental and sustainability management research. It integrated both resource-based and market-based approaches, adding to it the socio-political context. That become the basis for development towards sustainability in management. Based on Freeman's theory, Corporate Social Responsibility (CSR) developed, which directly implemented stakeholders' influence and possible benefits from sustainable practices where leaders believed that such practices affect value in a positive way. CSR is one of the most commonly used models for enterprises.

Adaptive Management is a tool used for sustainable cases relating to socio-ecologic issues⁹ but is used frequently in cases of multi-stakeholder situations in different disciplines¹⁰. Adaptive Management originated between multiple disciplines that were dealing with complex systems and have developed similar approaches for using applied science to deal with uncertain cases. In management, it can be linked with the concept of total quality management where it is based on continuous improvement and learning organizations.¹¹ The concept was popularized in natural resource management in 1978, with the publication of Holling's Adaptive Environmental Assessment and Management. It provides a model for approaching complex environmental management problems.¹²

⁸ Harvard Business Review. Nov/Dec96, Vol. 74 Issue 6, p61-78. 18p. 1 Black and White Photograph, 3 Diagrams, 1 Graph.

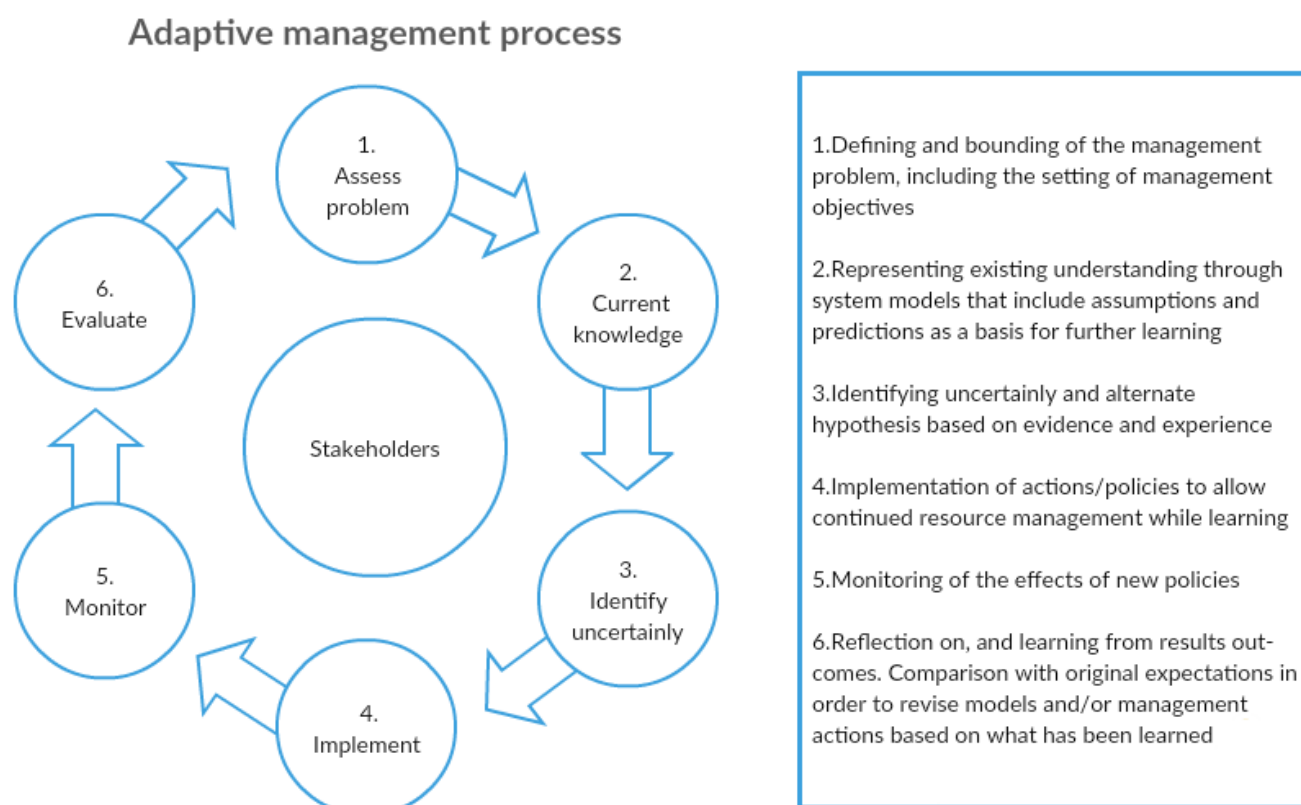
⁹ L. Rist, 2013. A new paradigm for adaptive management. Ecology and Society 18(4): 63.,

¹⁰ W. Allen C. Jacobson (2009) Learning about the social elements of adaptive management in the South Island tussock grasslands of New Zealand. Chapter 6 in Adaptive Environmental Management: A Practitioner's Guide. Book editors: Catherine Allan & George Stansky – Springer and CSIRO publishing pp. 95-114. Online copy available at http://www.learningforsustainability.net/pubs/Allen&Jacobson_AM_ch6.pdf

¹¹ Senge, P.M. 1990. The fifth discipline: the art and practice of the learning organization. New York: Currency Doubleday. 423 p.

¹² Stankey, George H.; Clark, Roger N.; Bormann, Bernard T. 2005. Adaptive management of natural resources: theory, concepts, and management institutions. Gen. Tech. Rep. PNW-GTR-654. Portland p. 4-8

Figure 1. The adaptive management process.



Source: Own elaboration L. Rist, 2013. A new paradigm for adaptive management. *Ecology and Society* 18(4): 63.,

On the presented graphic, the visible core of adaptive management processes are the stakeholders of the project, as the component that is responsible for the project's integrity with respect to the environment. The paradigm of adaptive management is a comprehensive set of tools to be used for evaluating sustainability and its constantly changing factors in a multi-stakeholders environment. Adaptive Management is an ongoing process based on learning and evaluation which interacts with stakeholders at each of 6 levels.

As ecological uncertainty is the main obstacle in achieving management goals for hydrotechnical projects, adaptive management is used as a recommendation for this project¹³. Adaptive management programmes generally include several learn–describe–predict–act cycles that should unfold over the 5–15 years of a policy cycle¹⁴.

¹³ Pahl-Wostl C., Transitions towards adaptive management of water facing climate and global change, „Water Resources Management”, 2007, t.21, no 1, pp. 49–62., A New Paradigm for Adaptive Management

¹⁴ Raadgever, G. T., E. Mostert, N. Kranz, E. Interwies, and J. G. Timmerman. 2008. Assessing management regimes in transboundary river basins: do they support adaptive management? *Ecology and Society* 13(1): 14.

Dams for Sustainability in Developing Countries

The roots of the sustainability concept could be associated with Freeman's Stakeholder Theory, as it is done in much research. Both concepts extend the view on the purpose of business beyond maximizing short-term shareholder value and creating synergies between different interests as one of the core challenges.¹⁵ Identification of that interpretation could be found in need of substitution of goals that had been recognized by the United Nations in 1987.¹⁶ Quantitative measures like economic efficiency should be compensated by social well-being and environmental care. Managing development in a sustainable way should differ from perceiving of the market from a perspective that prioritizes aspects of economic profit¹⁷ by focusing on foreseeing possible outcomes and implication of cooperation in order to provide the best outcome by moving forward from short-term pure financial optics to management of processes and values.¹⁸

The priority of large-dam construction is generating energy for industrial development and urban populations, which often overwhelms socio-economic and environmental considerations.¹⁹ Excluded from project evaluation are local communities, along with environmental damage and loss of livelihoods²⁰. It is common that they do not even gain access to electricity, because they are not provided the power from the large dams, and they are not sufficiently compensated for their disrupted lives.²¹

The raising of awareness and the establishment of sustainability seems to be improving global ways of thinking in a promising way. Unfortunately, the concept that has been crafted in European Union for over 40 years and implemented in the 2030 Agenda²² is not as easy to follow in developing countries.

An example of such is Uganda, where issues like education and training and availability of qualified labour create skill gaps that translate into difficulties for attracting investment that is essential to economic productivity and sustainability²³.

One of the ways to accelerate Ugandan development is cooperation with the Chinese government, which recently became the largest creditor in Africa. China engages mostly in infrastructure for resource extraction, telecommunications and transport. In Uganda, China helps with the construction of Dams Bujagali (2011), Isimba (2018) and Karuma (predicted

¹⁵ Jacob Hörisch, R. Edward Freeman, Applying Stakeholder Theory in Sustainability Management: Links, Similarities, Dissimilarities, and a Conceptual Framework Article in *Organization & Environment* · May 2014

¹⁶ <http://www.un-documents.net/wced-ocf.htm>

¹⁷ M. Porter, <https://hbr.org/1979/03/how-competitive-forces-shape-strategy>

¹⁸ Ansoff, H. I. (1957). Strategies for Diversification. *Harvard Business Review*. (Vol. 35 Issue 5, Sep/Oct).

¹⁹ Scott CA, et al. (2011) Policy and institutional dimensions of the water-energy nexus. *Energy Policy* 39:6622-6630.

²⁰ Stickler CM, et al. (2013) Dependence of hydropower energy generation on forests in the Amazon Basin at local and regional scales. *Proc Natl Acad Sci USA* 110: 9601-9606.

²¹ E. F. Moran (2018), Sustainable hydropower in the 21st century, PNAS published ahead of print November 5, 2018 <https://doi.org/10.1073/pnas.1809426115>

²² http://ec.europa.eu/environment/sustainable-development/index_en.htm

²³ Kamuntu, E(2012). Uganda Tourism Sector Situational Assessment: Tourism Reawakening, Kampala, Ministry of Tourism Wildlife and Heritage

to be finished in 2020), mandating Chinese construction companies to undertake the construction and fill the common knowledge and skill gap. In exchange, it benefits from provision on infrastructures. The borrowing government agrees to the Chinese companies' extraction of natural resources.²⁴

In order to achieve the global goal of providing sustainable energy in the global energy mix by 2030, it is estimated that 3,700 dams that produce more than 1 MW are either planned or under construction, primarily in developing countries²⁵. It is believed that the financial costs of the dams are enormous, and the benefits do not outweigh the costs. Negative consequences for ecosystem structures, function and human costs are often effectively avoided. Large dams are often promoted with ideas for local communities' benefits, such as free electricity and creation of working places. However, research performed by Moran suggests the opposite.²⁶

In order to maintain sustainable development, there must be performed large-scale optimisation of water management.²⁷ While dams are the most common way towards sustainable development²⁸ for developing countries, there are associated rentability issues regarding dam life span and their environmental impact. Both land and water management should be implemented along with them, as this is the only way for long-term exploitation of minerals, water, animals and plants for the changing production needs of humanity.²⁹

Functionality of the Dam

In order to understand what such a big investment as a large dam creates, we must look at it from the perspective of a product. A product is a set of both tangible and intangible values that must be recognised and understood to maximise received value. However, it must be kept in mind that it is a very complex project which creates a lot of different products with different clients. Basic value for the buyer is a product's core, which is intangible and provides basic value for the user. Real product is the sum of values suiting it for a consumer's needs, while broadened product provides all elements which make it more attractive for the client.

²⁴ H. Reisen (2017), Is China Actually Helping Improve Debt Sustainability in Africa? G24 Policy Brief No 9. Issue 10.

²⁵ Zarfl C, Lumsdon AE, Berlekamp J, Tydecks L, Tockner K (2014) A global boom in hydropower dam construction. *Aquat Sci* 77:161–170.

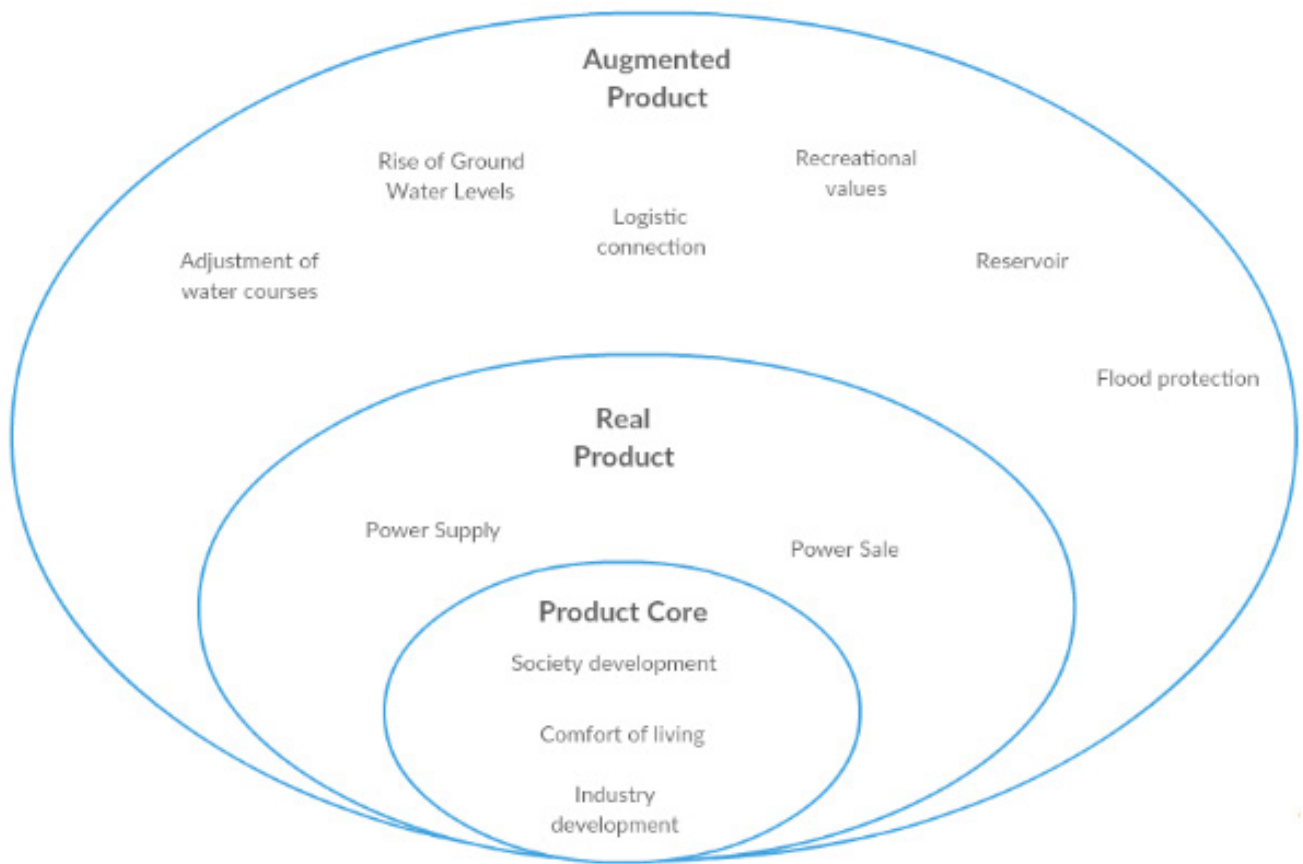
²⁶ E. F. Moran (2018), Sustainable hydropower in the 21st century, PNAS published ahead of print November 5, 2018 <https://doi.org/10.1073/pnas.1809426115>

²⁷ Bouwer H., Integrated water management: Emerging issues and challenges, „Agricultural Water Management”, 2000, t.45, no 3, pp. 217–228.

²⁸ WCD, Dams and Development: A new framework for decision-making, 2001, December

²⁹ Leucuta G., and Halbac-Cotoara-Zamfir R., Applied Hydrotechnical Measures in Sustainable Land Management, Case Study: Timis County, Romania, „Procedia Engineering”, 2016, t.161, pp. 1833–1837.

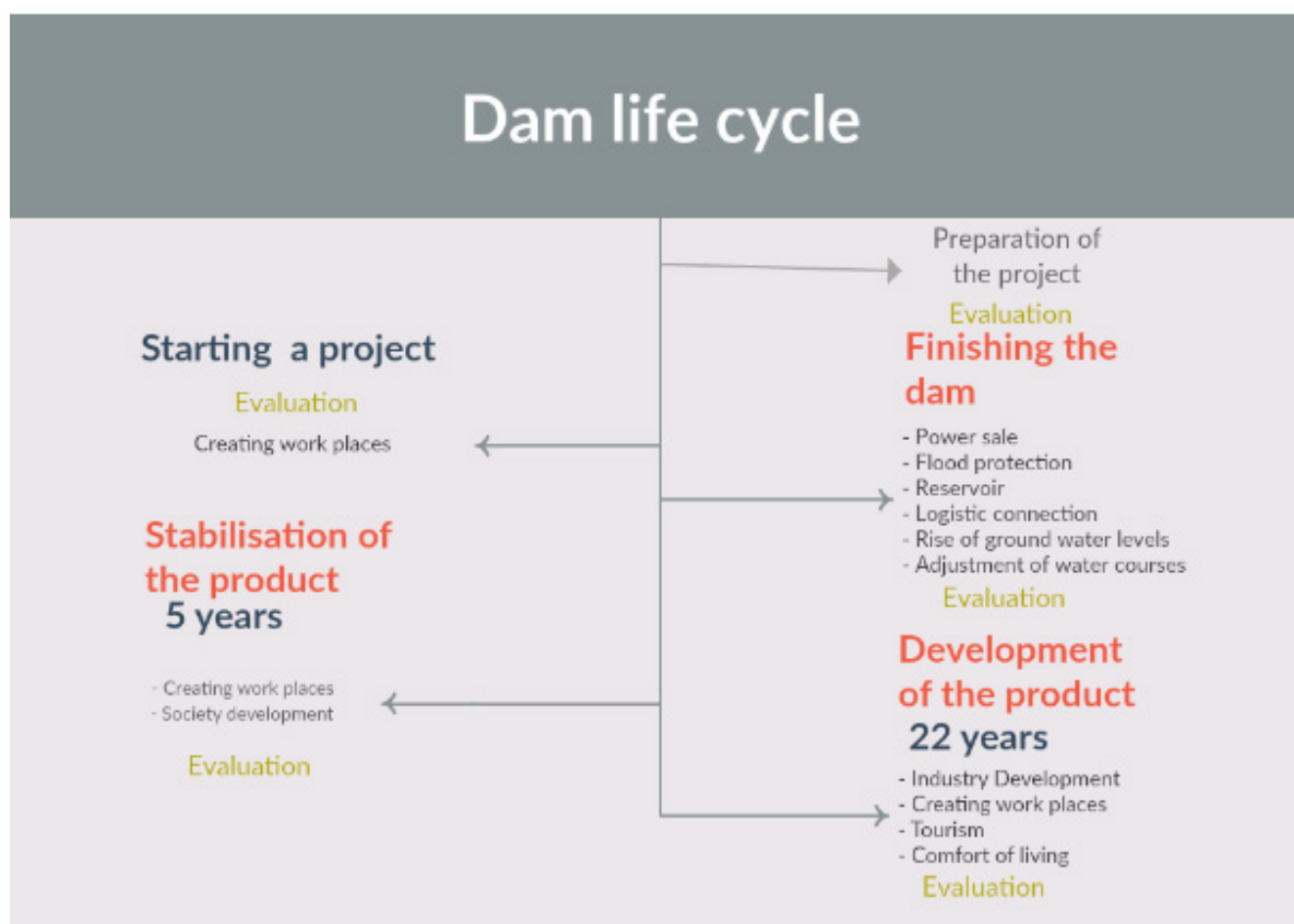
Figure 2. Dam as a product



Source: Own elaboration

To better understand such multi-stakeholder investment and get a broader scope of it in the long term, we will put it on a timeline in order to understand its infrastructural potential.

Figure 3. Dam Life Cycle



Source: Own elaboration

As presented on Graphic #2, a dam can be a narrow product itself; however, proper use of the infrastructure and opportunities it is creating might lead into development in more than the economic context, creating a product that will bring benefit not only economically by long-term planning but will fill the gap for short- and mid-term development for society by providing work spaces.

Value of the Dam

Artificial reservoirs are created in order to subsidise their natural functions. Additionally, often their target is to create added recreational or aesthetic values. Economic value of a dam is estimated to be high. It is difficult to measure the actual total value, which is why dams get undervalued despite the components they are providing.³⁰ Usually there are four value owners of reservoirs:³¹

1. Owner
2. User
3. Region
4. Society

There has been developed a concept of creating dam projects in order to increase their value through finding their additional use besides the real product elements³². Those are so-called multi-purpose dams that focus on extending the value of new and existing infrastructure. It is indicated how crucial is the recognition of the level of investment and their impact on the environment and the role of stakeholders in that process.^{33,34} A dynamic approach towards management of those projects involving stakeholders into the decision-making process can provide good methodology of value in the hydrotechnical investment process.³⁵ In some cases, investing in the increase of the quality of management and development of sustainability for a region's stability for the short term turns out to provide higher returns in the long term.³⁶ There occur dams with a life span shorter than average³⁷; however, due to their added value for the region, they become valuable projects economically thanks to the extended value they provide.

Evaluation for the value of the dam should be conducted based on research in three main areas: environmental, social and economic impacts and finding their stakeholders and influence of value on different areas. In much research, there are usually one or two aspects considered missing in the overall spectrum of considering society, environment

³⁰ Halkos G., Assessing the economic value of protecting artificial lakes, 2012, Online at <https://mpr.aub.uni-muenchen.de/39557/> MPRA Paper No. 39557, posted 20. June 2012 13:46 UTC

³¹ Leitch, Jay A. and Brett Hovde. 1996. "Empirical Valuation of Prairie Potholes: Five Case Studies." *Great Plains Research* 6 (Spring 1996):25-39.

³² Ledec G., and Quintero J.D., Good dams and bad dams: environmental criteria for site selection of hydro-electric projects, „Latin America and the Caribbean Region:Sustainable Development Working Paper No. 16", 2003, t.16, no November, p. 21.

³³ Zalewski M., Ecohydrology: Process-oriented thinking towards sustainable river basins, „Ecohydrology and Hydrobiology", 2013, t.13, no 2, pp. 97–103.

³⁴ Senzanje A., Boelee E., and Rusere S., Multiple use of water and water productivity of communal small dams in the Limpopo Basin, Zimbabwe, „Irrigation and Drainage Systems", 2008, t.22, no 3–4, pp. 225–237.

³⁵ Winz I., Brierley G., and Trowsdale S., The use of system dynamics simulation in water resources management, „Water Resources Management", 2009, t.23, no 7, pp. 1301–1323.

³⁶ Savovic I., Bacovic M., Pekovic S., and Stanovic T., Impact of Investment in Quality and Environmental Protection on Regional Sustainability, „International Journal for Quality Research", 1800, t.10, no 3, pp. 625–640.

³⁷ J. Voegelé, The Loess Plateau Watershed Rehabilitation Project, World Bank, Scaling Up Poverty Reduction: A Global Learning Process and Conference Shanghai, May 25-27, 2004

and economy.³⁸³⁹⁴⁰ Another issue is the fact that conducted research⁴¹, despite valuable observations, is not reflected in projects and future research. Worth noting is that research done in different geographical regions and different socio-economic level provides different results. (Brouwer, 2000).

Table 1. Dam Value Evaluation

Economic Impact Assessment ¹	Environmental Impact Assessment (EIA) ² (Including Climate Change)	Social Impact Assessment (SIA) ³
Quantitative		
Hectares flooded/MW After flooding: EIRR FIRR Employment Rate *Tourism Variable	Hectares flooded/MW*	People displaced / MW
Qualitative		
	Flooding of Natural Habitats Loss of Terrestrial Wildlife Involuntary Displacement Deterioration of Water Quality Downriver Hydrological Changes Water-Related Diseases Fish and Other Aquatic Life Floating Aquatic Vegetation Loss of Cultural Property Reservoir Sedimentation Greenhouse Gases	Effects on the rural economy Effects on culture, health and gender Effects on infrastructure, transportation and housing.

Source: Own elaboration

³⁸ Senzanje A., Boelee E., and Rusere S., Multiple use of water and water productivity of communal small dams in the Limpopo Basin, Zimbabwe, „Irrigation and Drainage Systems”, 2008, t.22, no 3–4, pp. 225–237.

³⁹ Minoia P., and Brusarosco A., Water Infrastructures Facing Sustainable Development Challenges: Integrated Evaluation of Impacts of Dams on Regional Development in Morocco, „The Berkeley Electronic Press”, 2006, no I.

⁴⁰ Halkos G., Assessing the economic value of protecting artificial lakes, 2012, Online at <https://mpira.ub.uni-muenchen.de/39557/> MPRA Paper No. 39557, posted 20. June 2012 13:46 UTC Halkos G., Assessing the economic value of protecting artificial lakes, 2012, Online at <https://mpira.ub.uni-muenchen.de/39557/> MPRA Paper No. 39557, posted 20. June 2012 13:46 UTC

⁴¹ Wildi W., Environmental hazards of dams and reservoirs, „Near Curriculum in Natural Environmental Science”, 2010, t.88, pp. 187–197.

⁴² OECD STATS, https://stats.oecd.org/Index.aspx?DataSetCode=REGION_DEMOGR

⁴³ Ledec G., and Quintero J.D., Good dams and bad dams: environmental criteria for site selection of hydro-electric projects, „Latin America and the Caribbean Region:Sustainable Development Working Paper No. 16”, 2003, t.16, no November, p. 21.

⁴⁴ Vanclay, F., 2002b. Social impact assessment. Encyclopedia of Global Environmental Change 4, 387–393.

In order to minimize adverse environmental and social impacts, assessment studies should be carried out in the early stages of project planning, and the resulting environmental mitigation plans should be fully implemented.⁴⁵ Conducting evaluations at each levels of dam life cycle (Graphic 2.) allows us to compare occurring trends and real value that has been created by the dam. Observation of changes will be a valuable source of knowledge for new projects.

Social and environmental evaluation are mostly qualitative. One of the key challenges of assessing the social impacts of dam projects is setting variables to measure. As Vanclay has noted⁴⁶, “The variables that are important must be locally defined, and there may be local considerations that a generic listing does not adequately represent”. This makes research very difficult to justify. Social Impact Analyses (SIA) analyses consequences on the human environment caused by investment process.

Environmental Impact Assessment (EIA) is the most difficult to perform, as it requires specialised knowledge from various areas. Also, it is the most difficult subject for which to predict the impacts, due to the

very complex nature of factors. Quantitative measures allow us to evaluate the cost of flooding. In specific cases, the same indicator as the economic one is used to measure the cost of flooded areas of unique habitats.⁴⁷

There are different ways of measuring economic value for hydroprojects; however, the most universal one for evaluating the project would be calculation of megawatt per square meter flooded. The most common evaluations post-dam building are the Economic Internal Rate of Return (EIRR) and the Financial Internal Rate of Return (FIRR). FIRR is conducted for the project owner in order to estimate whether the project is profitable, while EIRR is conducted to tell society if the overall welfare has improved. EIRR of over 10% is judged acceptable in the context of a developing economy. Additionally, the employment rate of the region should be measured.

An important issue is the lifespan of artificial reservoirs, which is estimated at 22 years before filling dead storage, which is estimated volume for mud sediment. As a dam is a big investment for economic, social and environmental aspects, creating ones that would last longer (i.e., using the channel for clearing sedimentation) would provide additional sustainability value. However these criteria might be difficult to meet in developing countries, as there are often no other ways of obtaining electric power.⁴⁸

⁴⁵ Vanclay, F., 2002b. Social impact assessment. *Encyclopedia of Global Environmental Change* 4, 387–393.

⁴⁶ Vanclay, F., 2002a. Conceptualizing social impacts. *Environmental Impact Assessment Review* 22 (3), 183–211.

⁴⁷ Ledec G., and Quintero J.D., Good dams and bad dams: environmental criteria for site selection of hydro-electric projects, „Latin America and the Caribbean Region:Sustainable Development Working Paper No. 16”, 2003, t.16, no November, p. 21.

⁴⁸ WCD, Dams and Development: A new framework for decision-making, 2001, December

It is a known fact that tourism is one of most often recognised positive value impacts for innovative added-value creation^{49 50} that is especially crucial in rural regions^{51 . 52} In France, reservoirs are called "Rural Points of Development" and are referred to as symbols of development⁵³. Proper management of hydrotechnical investment can stimulate growth in tourism⁵⁴, creating more opportunities for development and added value. The tourism variable has been added to proposed evaluation; however, it has to be adjusted according to the destination and its potential and current infrastructure.

Adaptive Management as an Innovative Solution for Hydropower

In order to develop multi-purpose dams, it is said that Adaptive Management should be implemented where prediction of influences scale is limited. Managing those resources must be a constant adaptation process ready for change based on the most recent research and improvements, which can develop new hypotheses that will help in evaluation of the dam as an innovative project and categorisation of its values.⁵⁵

⁴⁹ Leach M., Rockström J., Raskin P., Scoones I., Stirling A.C., Smith A., Thompson J., et al., Transforming innovation for sustainability, „Ecology and Society”, 2012, t.17, no 2.

⁵⁰ Hanley T., Science S., Kinner E., and Columbus U., GEOLOGICAL CONSIDERATIONS FOR CONSTRUCTING A RAFTING AND KAYAKING COURSE ON THE CHATTAHOOCHEE RIVER , 2012.

⁵¹ Kandefer, W., (2000), Usługi turystyczne a wiejski rynek pracy [Tourism services and rural job market] [in:] Dabrowska-Szeffler M. (ed.) Gospodarcza aktywizacja regionu Miedzyrzecza Wisły i Sanu przez rozwój turystyki i rekreacji [Economic mobilisation of the region between the Vistula and the San rivers through tourism and recreation development], Wyższa Szkoła Ekonomiczna w Nisku, Nisko, 72-83; Kandefer, W., (2006), Turystyka wiejska a rozwój lokalny [Rural tourism and local development] [in:] Sirko M., Bek J. (eds.) Rola turystyki w rozwoju gospodarczym obszarów wiejskich i lesnych [The role of tourism in the economic development of rural and forest areas], Wyższa Szkoła Ekonomiczna w Stalowej Woli, Stalowa Wola, 73-83;

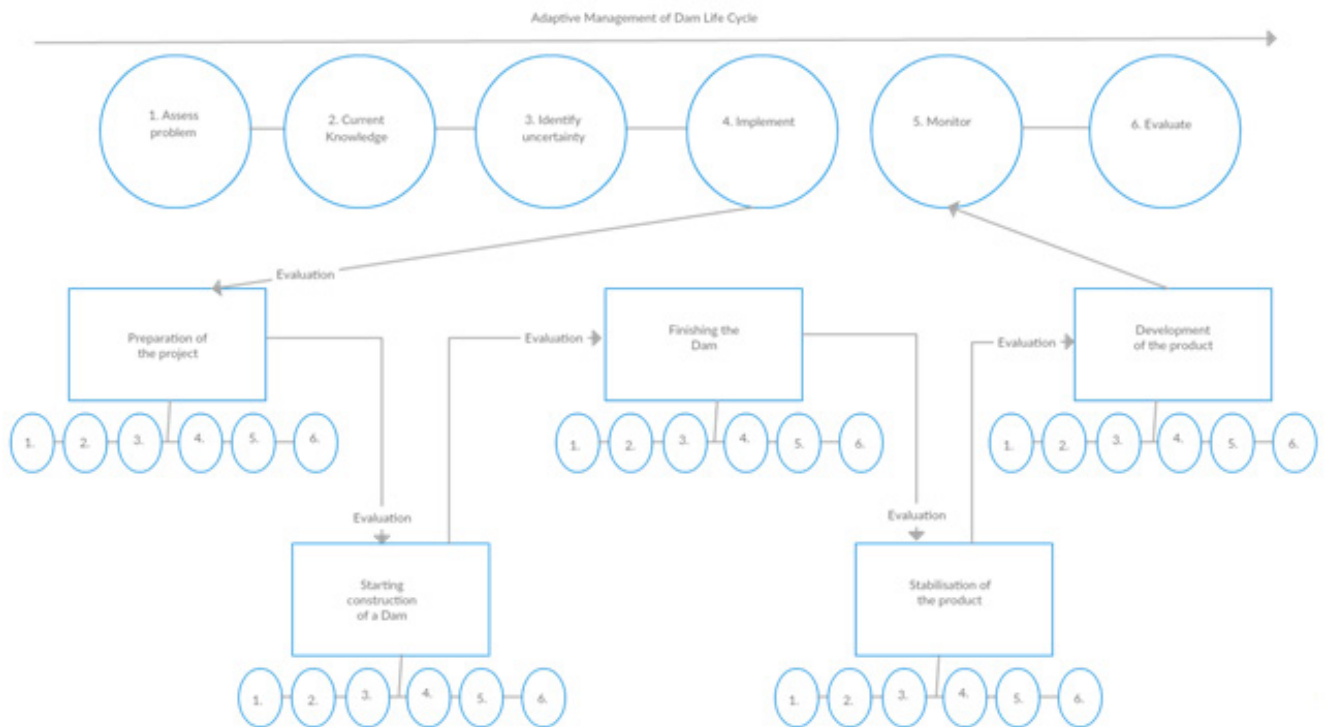
⁵² Wyzinska-Ludian, J., (2000), Związki agroturystyki z rozwojem ekonomicznym obszarów wiejskich [Connections between agritourism and the economic development of rural areas] [in:] Dabrowska-Szeffler M. (ed.) Gospodarcza aktywizacja regionu Miedzyrzecza Wisły i Sanu przez rozwój turystyki i rekreacji [Economic mobilisation of the region between the Vistula and the San rivers through tourism and recreation development], Wyższa Szkoła Ekonomiczna w Nisku, Nisko, 84-93.

⁵³ de Reparaz, A., (1991), Nowe przestrzenie wypoczynkowe powstające w wyniku budowy sztucznych zbiorników wodnych we Francji [New recreational spaces created as a result of the construction of artificial reservoirs in France], Acta Universitatis Lodzensis, Folia Geographica, 14, 55-70;

⁵⁴ Halkos G., Assessing the economic value of protecting artificial lakes, 2012, Online at <https://mprapaper.unimuenchen.de/39557/> MPRA Paper No. 39557, posted 20. June 2012 13:46 UTC

⁵⁵ Pahl-Wostl C., Transitions towards adaptive management of water facing climate and global change, „Water Resources Management”, 2007, t.21, no 1, pp. 49-62.

Figure 4. Adaptive Management of Dam Life Cycle



Source: Own elaboration

By connecting adaptive management model with Dam Life Cycle author had developed model that indicates constant evaluation of the project at it's different phases. Key components of it are overall aspect that present whole Dam Life Cycle and implementing Adaptive Management to it to create base of knowledge and generate value for another projects while at the same time each level of Dam Life Cycle has its own adaptive management model that connects previous level with current one estimating its change and value. Key element for this micro level is that in order to introduce adaptive management for each levels of Dam Life Cycle – Dam Value Evaluation (Table 1) should be implemented. Connecting both levels allows to provide detailed and statistically valuable results that can be used for further investments.

Through constant management and diagnosis, a big base of knowledge and common practice would be developed. By performing at least five key evaluations during the life cycle of the dam, there would be provided complex data answering questions on how to improve sustainability of the dam that could be implemented beyond the given project. To bring extended value of this practice, constant learning and re-evaluation process must be conducted.

Sustainability is a developing concept, and a lot of efforts are dedicated to it. However, the practice of building dams had been stopped in developed countries and has now moved to developing ones. The social and environmental costs paid were significant, and not

many empirical full-case studies have been performed. As the trend of dam building keep developing, it is necessary to provide efficient evaluation that will improve hydrotechnical investments in the sustainability context.

In order to reach sustainability, every project must be considered as a potential sustainable innovation through a process where sustainability considerations (environmental, social, financial) are integrated into project management from the early stages. Starting at idea generation through to research and development (R&D) and commercialisation ⁵⁶, it must be evaluated in order to transform the hydropower sector to achieve the benefits to exceed the costs.

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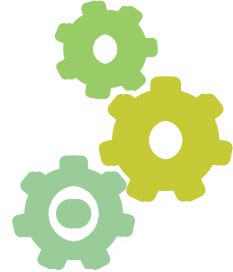
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Stylistic topos „...the hungry and thirsty...” as an element of the social component of the sustainable development concept

Abstract

In the article presented the function of the stylistic topos “hungry and thirsty” in the texts of Ukrainian medieval literature. Topos “hungry and thirsty” is an element of the social structure of society, representing different social strata. Topos “hungry and thirsty” is used as a nomination for social classes. It is the basis of the concept of sustainable development, which originates from the period of the Middle Ages. The use of the medieval authors of the topos of “hungry and thirsty” makes it possible to speak about the emergence of the idea of sustainable development from the 12th century.

Keywords: topos, stylistic topos, sustainable development, “hungry and thirsty”, social component

Stylistyczne toposy “...głodni i spragnieni...” jako element koncepcji społecznej zrównoważonego rozwoju

Streszczenie

W artykule zaprezentowano funkcję stylistycznych toposów “głodnych i spragnionych” w tekstach ukraińskiej literatury średniowiecznej. Topos “głodny i spragniony” jest elementem społecznej struktury społeczeństwa, reprezentującej różne warstwy społeczne. Topos “głodny i spragniony” jest używany jako nominacja dla klas społecznych. Jest podstawą koncepcji zrównoważonego rozwoju, która pochodzi z okresu średniowiecza. Wykorzystanie średniowiecznych autorów toposów “głodnych i spragnionych” pozwala mówić o pojawieniu się idei zrównoważonego rozwoju od XII wieku.

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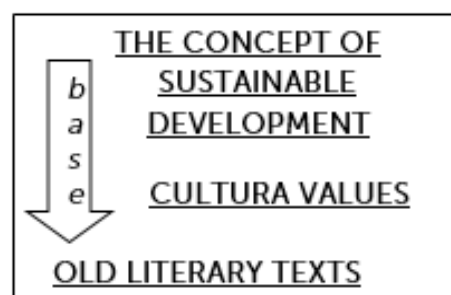
Słowa kluczowe: topos, stylistyczne toposy, zrównoważony rozwój, "głodny i spragniony", element społeczny

1. Introduction

The social aspect of the concept of sustainable development (hereinafter SD) is aimed at the individual and preserving the stability of their socio-cultural environment. A key aspect of this approach is the equal distribution of benefits, the preservation of cultural potential and diversity on a planetary scale. Basing on the increasing options for choosing people as the main value, the concept of the SD assumes that people should actively participate in the processes that form the sphere of their life.

To achieve the SD, modern society is to create an effective decision-making system that takes into account the previous historical experience, because history is nothing but a consistent change of separate generations, each of which uses the achievements inherited from the previous generations. As the knowledge of the history of the previous eras deepens, as well as the ability to appreciate the achievements of the past, humanity receives a unique opportunity to take the pre-acquired cultural heritage as a basis for the development course. In addition, all forms of social consciousness are ultimately determined by the material basis of culture and the mutual influence of different cultural layers.

That is why an objective study of the history of culture, including literature, is as important as the very preservation of cultural monuments in the context of the implementation of the sustainable development concept. One of the most important evidence of this is the development of «understanding» cultural values of the past and cultures of other eras, the ability to preserve and perceive their aesthetic value. In addition, the understanding of a different cultural era is not a refusal from the "alien" – choosing the best direction for development is constantly accompanied by the expansion of understanding of the system of cultures of the past.



2. Ukrainian medieval literature – base of the concept of sustainable development

Today, the question of studying medieval culture is gaining more and more importance. Society is getting to realize that the solution of many problems of modern history is impossible without the involvement of the historical experience of the middle ages. According to the researcher O. Slipushko, the political and cultural significance of the Ukrainian Middle Ages literature, especially the literature of the Kievan Rus, is determined

by its significant contribution to the development of "the foundations of statehood and the nation, formation of the political status of the people" [Slipushko 2009, p. 384]. Writing system of the Kievan Rus became the basis for the current understanding of the state-constituting processes, spirituality and culture.

Special role of Ukrainian Medieval literature was underlined by the scientist P. Bilous, who notes that "this is a significant stage in the development of our writing, this is the source of many literary traditions, our artistic and historical memory" [Bilous 2013, p. 55-60]. The Study of Ukrainian Medieval literature includes reconstruction of a multifaceted cultural system, some components of which had their own unique features and characteristics and were imprinted in the works of literature.

In regard to the medieval writing culture it should be noted that the literature of the specified period belonged to the traditionalist type. During its existence it was developed on the basis of constant reproduction of a limited set of figurative, ideological, compositional, etc. structures – *topoi* (Latin *locus communis*, 'common place'), that found their expression in the constancy of epithets, stylistic clichés and motifs. On the basis of these clichés stylistic *topoi* were formed, having their own semantic, thematic and expressive canon.

The point of the *topos* functioning in literature was brought up in 1948 in the book by E.R. Curtius *European Literature and the Latin Middle Ages*, which defined a literary *topos* as a way to design the entire complexes connected with typical situations. Curtius drew attention to the fact that the *topos* "tends to have formal character and most often corresponds to a specific verbal form" [Makhov 2001, p. 176].

The literary critic D. S. Likhachev was one of the first to draw attention to the fact that repetitive elements of poetics in ancient Russian works are not only verbal formulas, but "also the situations in which these formulas are used" [Likhachev 1961, p. 96]. Many researchers call for distinguishing between these two types of "common places", but they hold different opinions as to what terms they shall be referred to with. Scholar A.V. Tvorogov suggested calling the repetitive elements of the plot "traditional/sustainable literary formulas", and the stylistic clichés – "stable combinations" [Tvorog 1964, p. 29-40]. Scholar L. Koniavska believes in the necessity of retaining the very term *topos* "in order to refer to common places, and use the term formulas to designate repetitive phrases" [Konyavskaya 2004, p. 80-92]. The problem is that quite often common places as plot elements correspond to clichés. In its second, more narrow meaning, *topos* is a unit of artistic space of the work, which occupies a certain place in the style of the text. Scholar Yu. Lotman defines this notion as "the spatial continuum of text, which displays the world of the object" [Lotman 1970, p. 82]. The researcher calls the system of the spatial relations arising in the literary text the structure of *topos*, which acts as a language for the expression of other, complicated relations. That is especially important in the context of the study of the SD concept social component.

3. The history of the stylistic topos "hungry and thirsty" as an element of the social component S.D.

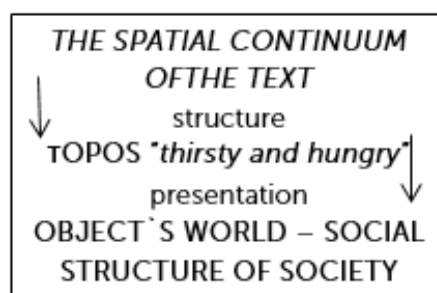
This topos originated in Antiquity; it was first mentioned by Plato in his work *The Republic*. Thus, in one of the dialogues of *The Republic* written in 360-370 BC (book 4), the philosopher highlights the discussion on the question of human desires, posed by the Adiman to Socrates: "To **be thirsty, to endure hunger** and generally to long something, as well as to desire and to want – will you not

refer it all the phenomenon we have just talked about? Will you not say that, for instance, that a soul of a human being, who always strives something, either fights for what they strive, or embraces what they want to obtain?" [Plato 2000, p. 355]. On the example of hunger and thirst, Socrates explains that each of the human desires in its essence, in a separate case, is aimed at what corresponds to its nature, and its specific implementation depends on those desires that accompan the main desire. If it is thirst, satisfaction of this desire means consuming some liquid; and in this case question "how" is already minor. On the example of satisfaction of the simplest human instincts, thirst and hunger, the ancient philosopher convinces that all human desires are inherently natural, because they are only what they are by nature.

In the Middle Ages this topos acquired a Christian connotation. Christ says that to feed the hungry and to give to drink the thirsty is one of the greatest Christian traits: "For I was **hungry**, and ye gave me meat: I was **thirsty**, and ye gave me drink..." (Mat. 25: 35). Matthew reads "Blessed are they which do hunger and thirst after righteousness: for they shall be filled" (Mat. 5: 6). One of the Beatitudes relates to the Sermon on the Mount of Jesus Christ, the center of which is the word "justice". The hungry and the thirsty from the fourth Commandment are those who seek justice. Believers should seek justice in the first place, like the hungry wanting to satisfy their hunger and thirst. In this context justice coincides with Christian righteousness. Therefore, the hungry and the thirsty are those striving for justice and longing for righteousness. Like hunger and thirst, righteousness is eternal. Longing for righteousness should accompan people throughout their life.

The explanation of Christ's words evolved over time in a social direction meaning the **desire for social justice** for the poor (to be helped) and for the unfair (to be punished for their misdeeds).

In the Bible one often finds functioning of this topos to denote the desire to know the Christian faith:



<p><i>"The days are coming," declares the Sovereign Lord GOD, "when I will send a famine through the land – not a famine of food or a thirst for water, but a famine of hearing the words of the Lord.</i></p>	<p><i>For I will pour water on the thirsty land, and streams on the dry ground; I will pour out my Spirit on your offspring, and my blessing on your descendants. They will spring up like grass in a meadow, like poplar trees by flowing streams.</i></p>	<p><i>Therefore, this is what the Lord GOD says: "My servants will eat, but you will be hungry; my servants will drink, but you will be thirsty; my servants will rejoice, but you will be put to shame..</i></p>
<p>Book of the Prophet Amos 8:11</p>	<p>Isaiah 44: 3-4</p>	<p>Isaiah 65:13</p>

Similar desire is expressed by the topos in the figurative language of King David: *"As the hart panteth after the water brooks, so panthes my soul after Thee, o God. My soul thirsteth for God..."* (PS. 42, 2-3).

These examples demonstrate the paradigm of topos "hungry and thirsty" and the change of its symbolism with the advent of Christianity. It can be traced how the imagery of the topos "hungry and thirsty" is used by Plato in the figurative meaning of "human desires" acquiring the symbolic meaning of the "life of the righteous" in the spirit of Christianity.

Functioning of this topos in the texts of Ukrainian medieval monuments is to be explored next.

3.1. Kievan Metropolitan Hilarion «SERMON ON LAW AND GRACE»

"The Sermon on Law and Grace" is an outstanding work of eloquence of the Kievan Rus, written by Metropolitan Hilarion. The main idea of the work, according to the researcher of old literature S. Vysotsky: "to prove that Christianity in Russia was accepted due to the wisdom of Volodymyr, and not under the outside influence" [Vysotsky 1989, p. 113-115]. A striking confirmation of this hypothesis is a fragment of the text, when the author admires of this act and sounds genuinely surprised: "How was your heart opened?... You have not seen the Apostle, who would come to your land and through his poverty and **hunger and thirst** make your heart in humble..." [Electronic resource: litopys.org.ua/oldukr/ilarion.htm. access 29.01.2019]. Topos "hunger and thirst" in this context acts as an assessment of the characteristics of the physiological state of the Apostles. Ilarion emphasizes that Volodymyr accepted Christianity as a unique gift, without knowing beforehand about the deeds of the Apostles, their sermons and miracles. The technique of amplification is skillfully applied to list the whole complex of actions supposed to encourage the ruler to be baptised. When the Apostles preached the idea of Christianity in other lands, from Rome to Syria, and the local rulers subjected them to persecution, Vladimir decided to be baptized HIMSELF, and then chose Christianity as the official religion of the Rus. Topos "hungry and thirsty" is quite consistent with the realities of medieval life, when the Apostles were persecuted and murdered sacrificing their own life for the faith.

Though in the analyzed fragment the topos of «hunger and thirst» designates physiology of wandering preachers, in the next part of the same text «hungry and thirsty» denotes a separate social class of the medieval poor: «...*not only spoke, but also turned them into action, giving to the poor, clothing the naked, **nourishing the thirsty and hungry**...*» [Electronic resource <http://litopys.org.ua/oldukr/ilarion.htm>. access 29.01.2019].

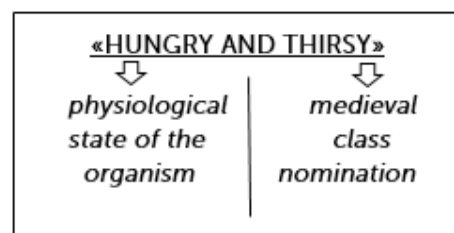
In the slave-owning period begging was not as common as in the Middle Ages – free people in a desperate situation could fall into slavery and worked for food, while the poor could be enslaved against their will. In the Middle Ages seigneurs were not obliged to feed the peasants and therefore poverty and hunger became common. The European Chronicles mention 28 years of famine (907-1040). Crop failure took place three years in a row that devastated Greece, Italy, France and England in the 30s of the 12th century.

It is also impossible to cast away the religious factor of the phenomenon of poverty: the Christian faith paid much attention to the poor, because it was believed that the prayers of the poor reach the Heaven faster. Archbishop John Chrysostom of Constantinople proclaimed love for the destitute as a duty for every righteous Christian back in the 4th century. As a result, “professional” beggars appeared quite soon; all in all those people just did not want to do anything else. They moved from one place to another, singing mournful songs and demonstrating various injuries and illnesses.

Thus, the “thirsty and hungry” represented the social layer of the population, which the Prince Volodymyr supported since the very beginning of his reign. In the 3rd part of the *Sermon* Illarion glorifies the reign of Volodymyr Sviatoslavych, who was “like clothes for the naked, **like food for the hungry, like water for the**

thirsty” [Electronic resource <http://litopys.org.ua/oldukr/ilarion.htm>. access 29.01.2019]. In this context, Vladimir’s charity to “thirsty and hungry” is understood as a feat worthy of Church honoring, guaranteeing the Prince eternal memory and life in the heavenly Paradise. The donation resulting from the personal mercy of Prince Volodymyr has been important in Christianity since the time of Christ himself. Alms, in the Christian sense, for Volodymyr became one of the forms of conversion to Christianity: if baptism in the Dnipro River is associated with the physical ritual designating acceptance of Christianity, along with prayer and fasting, alms is understood as a spiritual element of conversion to a new religion. It should also be remembered that, in the light of Christian morality, giving alms becomes a form of redemption for one’s former sins.

The practice of charity is prominent in the old Testament. The Prophet Isaiah says: “share your bread with the hungry, let it go to the house of poor, the homeless...” (Is. 58:7-8), or, for example, we find in the book of Tobit the speech of Archangel Raphael: “it is better to do alms than to accumulate gold. Mercy from death will save, cleanse from sin” (Tov. 12:8).



4.2. Theodosius of Kyiv «WORD ON LATIN OR VARANGIAN FAITH»

Monk Theodosius of Kyiv the author of the work *Word on Latin or Varangian Faith*, which is focused on the idea of observance of the virtues of the Orthodox faith and escape from the temptations of the Latin faith, that is Catholicism. The given literary text features of modification of the stylistic topos "hungry and thirsty", which the author replaces with the option "eat and drink": *"The Latin neither **eat or drink** with them from one dish, nor take bread from them..."* [Electronic resource <http://litopys.org.ua/oldukr2/oldukr17.htm>. access 29.01.2019]. However, this does not change the task of topos: demonstrating another medieval social strata – the clergy. Christians believed that the salvation of the soul of the believer is possible only through the Church, so it is no accident that the clergy was one of the main medieval society classes. Christian priests were treated with respect, as their duty was to pray for sinful souls. They did not pay taxes, the Church itself existed at the expense of Church tithing. The clergy was believed to be a medium between God and man; obeying the teaching of the priests was regarded as the only way to escape torments of hell.

This text written by Theodosius of Kyiv was addressed to the Kievan Rus ruler Prince Iziaslav Yaroslavych as an encouragement to protect Christianity from the threat of the Catholic influence. According to V.Ya.Petrukin, Theodosius' encouragement was aimed at Christians who hesitated choosing between the Greek and Latin devotions. Initial emphasized unacceptance of "foreign faith" by the Christian Church even in the rituals received a shade of unsteadiness, shakiness, which had to be strengthened by the encouragement: *"Give to those, who for the sake of God, plead to **eat and drink**, but in their own dishes; if there are no dishes on them, give in your own, and then wash them and make a prayer; because they believe wrongly"* [Electronic resource <http://litopys.org.ua/oldukr2/oldukr17.htm>. access 29.01.2019]. Since Christian dogmatism denied the manifestation of aggression and supported giving alms, the stylistic topos "eat and drink" refers also to one of the Christian Commandments – "Love your neighbor as yourself" (Mat. 22: 39). A Christian has no right to prevent a person following different religion from satisfying their physiological needs for food and drinks, however, extreme conservatism does not enable direct contact and understands giving alms in one's own dishes as desecration of the Christian faith, which may be avoided through saying prayer.

4.3. Jakob Monk «THE MEMORY AND PRAISE OF PRINCE VOLODYMYR»

Memory and praise to the Prince of Rus Volodymyr is considered to be one of the masterpieces of the Kievan Rus era, its author, however, is still undefined. Some scientists suggest that it could have been written by Jakob the Monk mentioned under the year of 1074 in the *Tale of bygone years*. Others believe that there were several "Jakobs" and that they lived not only in the 11th century, that is, the work is a compilation. The texts

describes how Prince Volodymyr was baptized and how the Rus was baptized by him. Author describes the process of adoption of Christianity in the Rus, and according to his point of view, it happened quite natural, because even Princess Olha glorified God.

A special place in the text is called *Life of Prince Volodymyr*. Written in the spirit of classical hagiographic works it depicts Volodymyr as «an Ascetic and a Saint», although the Church canonized him much later. A set of stereotyped schemes and motives is used in the work, for instance, stylistic topos «*hungry and thirsty*» that denotes a specific type of religious behavior of the Prince: «*In cities and villages everywhere he did deeds of mercy: the naked were dressed, the hungry **were fed and the thirsty got water***» [Electronic resource litopys.org.ua/oldukr2/oldukr56.htm. access 29.01.2019]. Topos designates of largest layer of medieval society – the poor, who were not perceived as an economic and social anomaly, but on the contrary, were considered to be a kind of moral education objects, as helping them was a condition for the salvation of the soul.

Alms as a kind of aid for socially vulnerable layers of the population became known in the Rus due to Volodymyr the Great. He was the first Christian Prince to pay so much attention to the poor and the miserable; his concern for the poor and his gentleness, according to the chronicler Nestor, “*was beyond the state benefit*” [Electronic resource litopys.org.ua/litop/lit01.htm#page9. access 29.01.2019]. Prince Volodymyr created a system of social protection of the population, which provided that every beggar and pauper could come to the court and get food and drinks, and money from the Treasury. Furthermore, he developed the first individual social assistance ordering to make carts, load them with bread, meat, fish, and vegetables, and travel around the city and handing the products to the poor and sick.

3.4. Danylo the Confined «THE WORD HE WROTE TO HIS PRINCE YAROSLAV VOLODYMYROVYCH»

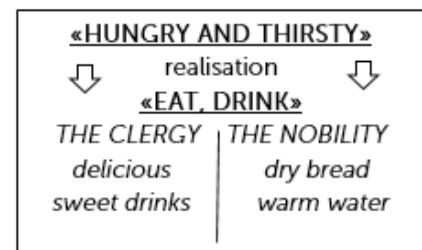
The Word by Danylo the Confined is an outstanding text of world cultural heritage, addressed to Novhorod Prince Yaroslav Vsevolodovych; it was written in the 13th century. It bears a deep philosophical and socio-political meaning, where the voice of a human being, a spiritually liberated person is quite distinct. The author boldly addressed the Prince with the list criteria for the ideal ruler: moral (full compliance of personal qualities to the norms of Christian ethics), legal (respect for the rule of law in the acquisition of power, and in the ways of its implementation), political (the ability to ensure governance, peace with neighbors, union with the Church).

The author advises the Prince to build effective social policy on the example of creating a successful family: “*Do you say to me: “Find a rich father-in-law and marry for great hon-or – there you shall **drink and eat**? I’d rather have a brown ox entering my house than marrying an angry wife. Since an ox does not speak, does not plot evil, and an angry wife, when beaten, – rages, when loved – fancies herself, being wealthy – boasts, being*

poor – judges the others” [Electronic resource <http://litopys.org.ua/oldukr2/oldukr62.htm>. access 29.01.2019]. Once again the reader sees a variant of topos “hungry and thirsty” – “drink and eat”, which highlights the well-being of the rich and noble people, who later formed a powerful layer of feudal lords. These were large landowners who later on formed a dominant stratum of society, on which the royal power relied. The use of topos “drink and eat”, as signs of the availability of food, became an indicator of the social origin of a certain social group, the feudals, for a hungry Europe.

For Danylo the Confined, who was a Christian author, wealth is a social disadvantage, and rich people are nothing more than a social evil, which should be eliminated. That is why he does not advise to create a family with representatives of the rich, “evil wives”, because social inequality will lead to a rapid termination of these relations.

The Sermon on the Mount presents the conditions for entering the Kingdom of God; Jesus encourages to collect treasures of higher quality, not just material things, which may be very often spoiled: “do not collect treasures on the earth, where moths and chrobotstvo, and where thieves dig up and steal. Lay up for yourselves treasures in heaven...”



(Mf. 6: 19-20). Moreover, Christians find it impossible to serve God and wealth at the same time: “No one can serve two masters: either one will hate, and the other will love, or hold on to one, and other will be neglected. You can’t serve God and mammon.”(MF. 6: 24). (Mammon – God of wealth).

As opposed to the feudal class representin the antithesis of the clergy, the author appeals to the Prince: “So, when you rejoice with a lot of treats, think of me, who eats dry bread, when you drink sweet beverage, think of me, who **drinsk warm water**” [Electronic resource <http://litopys.org.ua/oldukr2/oldukr62.htm>. access 29.01.2019]. Thus, we see one more variant of the topos “hungry and thirsty”, which allows us to differentiate the state of the clergy and the feudal basing on the type of foods they consume.

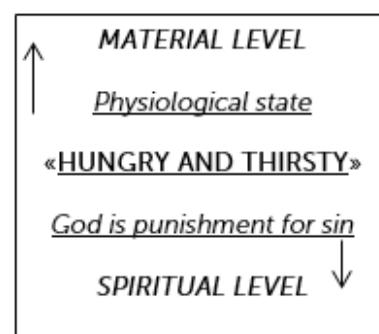
4.5. KYIV-PECHERSK PATERICON. Word 35

Kyiv-Pechersk Patericon is one of the most important literary works within the period of the Kievan Rus. It was created in the second half of 11th – the first half of 12th cen. spread out in manuscripts for a long time. It contains a set of stories about the emergence of the Pechersk Monastery and its first figures, as well as information on economic, social and cultural relations in the Kievan Rus. It is based on the *Message* from the former Kiev-Pechersk monk Simon to Polycarp (with the application of the *Lives* of the first Pechersk monks) and the *Word on the Creation of the Pechersk Church*, the *Message* from Polycarp to Archimandrite Akindin and his story about the Pechersk monks. The collection of the texts was finished mainly in the 15th century.

One of the Paterikon stories (Word 35) tells of the monk Pimen, who at first was just a common man suffering from illnesses for a long time, who later was sent to the monastery for treatment. His rich parents prevented him from taking monastic vows, so he prayed fervently about staying at the monastery as long as possible. The monks of the monastery had an aversion to Pimen's disease, so they often «left him **hungry and thirsty** for two or three days.» However, Pimen was thankful to God for such a humiliation. Topos «hungry and thirsty» demonstrates in this context the social inequality between the sick and the monks.

As a spiritual environment, monastery cannot be a place of manifestation of any differenceS between social groups; there is punishment for negligent monks within its territory: «A healed from his disease brother aversed Pimen and left him **hungry and thirsty**. He lay down in a separate building, and suddenly a fever broke out in him, and he could not get up for three days» [Electronic resource <http://litopys.org.ua/pvlyar/yar09.htm> access 29.01.2019].

A monk who has neglected his duty to obediently serve Pimen suddenly finds himself in a similar situation – suffering from thirst caused by fever. Reader has an opportunity to observe how the social roles of those who previously needed help and those who provided it are changing. Pimen, representing an ideal life of monks, does not repeat the act of his predecessor, and according to the spirit of Christianity forgave the abuse, and repeated that equal retribution awaited those being ill and those serving the ill. This example of the topos usage confirms the possibility of its functioning on two levels: material – characterizing the physiological state of man, and spiritual symbolizing God's punishment for sin.



4.6. Volodymyr Monomakh «HOMILY»

Homily is a unique work in which Volodymyr Monomakh expresses thoughts of national character, teaches his children to be reasonable rulers and to protect the interests of the Rus. He urges to fight against civil strifes among the Princes, to learn and spread education, to set an example to others by their own behavior. He reinforces the instructions with examples from his own life, talks about the numerous campaigns caused by the necessity to strengthen the unity of the Rus and ensure its protection from external enemies: "go to war, do not be lazy, do not rely on the warlord; give in neither to **drinks nor to food** or sleep..." [Electronic resource <http://litopys.org.ua/pvlyar/yar09.htm>. access 29.01.2019]. During his reign, the Prince managed to restore order on the borders of the Rus, and Polovtsi tribes were feared to attack, remembering the sad fate of the khans of Itlar and Kitan, which were captured and assassinated by the warriors of Monomakh. Fighting against the tribes Monomakh reached the Don River and drank its cool water using the "golden helmet".

One of the instructions of the Prince listed in the text of the *Homily* is devoted to fostering military valor in descendants. He convinces them that military operations is to be initiated with diligent preparation avoiding laziness (another medieval topos). None of the material things can intervene with the victory in the same way stylistic topos “drink and eat” supposes. Thus, it depicted another medieval class – “those who are fighting”, composed of the princes and their retinues, which were given the responsibility to protect Christendom from foreign and domestic enemies. Monomakh emphasizes the inferiority of everyday needs as compared to achieving a military goal, and the physiological need for food and drinks is understood by the author as a disadvantage that should be overcome by a warrior, and as a result – getting the desired victory.

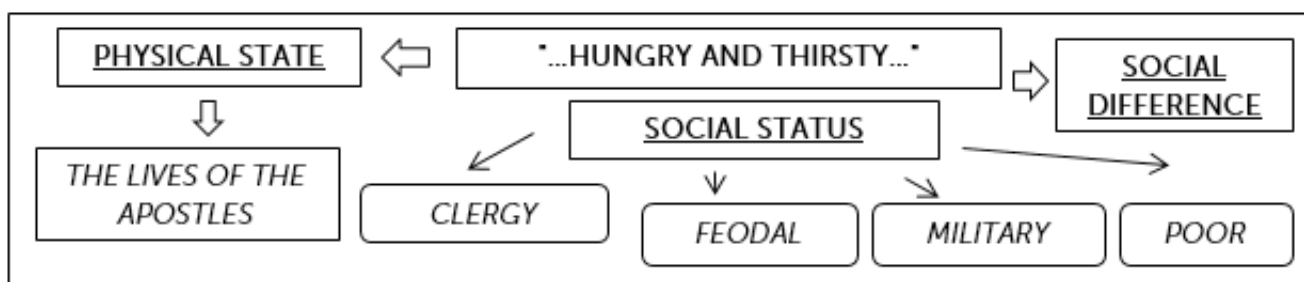
5. Conclusion

So, having analyzed the topos of “hungry and thirsty” in ancient literary works, we can come to the conclusion that it is an element of the social structure of society and functions as:

- **evaluation of the characteristics of the physiological state** – *difficult economic situation and uneven distribution of resources (natural, human);*
- **nomination of social classes: clergy, princes, soldiers, beggars** – *in the structure of the topos we learn about the social classes of the medieval society;*
- **a marker of social inequality** – *the topos represents the system of social inequality of the Middle Ages.*

The study of medieval texts gives people of the 21st century an idea of the structure of the medieval society, and the topos of “hungry and thirsty” demonstrates its social stratification. The efforts of the princes of Kievan Rus to implement social policy and reduce the social distance between different social strata gives us the right to speak about the origins of sustainable development in the territory of Ukraine from the 10th-11th centuries

In general, it should be added that the functioning of the stylistic topos of the “hungry and thirsty” in the analyzed works was significantly influenced by the historical context and traditions of Christian culture.

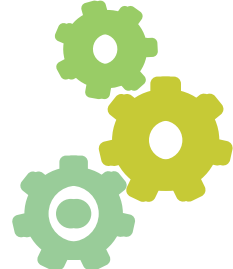


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Pavel FOBEL¹

Increasing the professional prestige of ethical expertise as an assumption of good practice

Abstract

Ethical expertise is at present an important prerequisite for professional work and the successful implementation of ethical tools. The basis for social acceptance must be ethical analysis and expertise. Designing appropriate ethical tools and integrating them into the social and institutional environment can guarantee their success and create adequate frameworks for good practice, good reputation and ethical issues. Ethics can then be accepted as an effective form of influencing the social atmosphere and promoting good living.

Keywords: ethical expertise, applied ethics, ethical analysis

Zwiększenie profesjonalnego prestiżu etycznej ekspertyzy jako założenie dobrej praktyki

Streszczenie

Problem dzisiejszej korupcji to nie tylko problem prawny, ekonomiczny czy polityczny, ale nawet jest to problem etyczny. Jego rozwiązanie wymaga systemowego i kompleksowego podejścia, synergii różnych narzędzi i mechanizmów. Kultura organizacyjna odgrywa ważną rolę w środowisku korporacyjnym. Jeśli zostanie odpowiednio skonfigurowana i wspierana, może służyć jako skuteczny mechanizm etycznego wsparcia i promowania dobrych praktyk. Przyczyny korupcji mogą być osłabione, a nawet wykluczone, postrzegane raczej jako nieodpowiednie i oceniane

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jako niezgodne z oczekiwaniami. Odpowiednie narzędzia promowania kultury etycznej się również zapisane w standardzie ISO 37 000. Wskażemy atrybuty kultury etycznej i odpowiedni sposób jej budowania w organizacjach.

Słowa kluczowe: ekspertyza etyczna, etyka stosowana, analiza etyczna

Instead of the introduction: theoretical theme of the problem

The establishment of applied ethics and their entry into the portfolio of scientific or educational fields of study at universities raised the question how the graduates of this study can apply in practice. This fact subsequently provoked the issues related to the designation of this profession, possibilities of ethical expertise and mission of experts in ethics. We will try to respond to this problem and express our opinion.

The issue of ethics expertise

An expert is generally defined as the holder or bearer of qualified, expert information, respectively a role that can be admitted by a well-educated individual approaching the role of consultant, counselor, respectively arbitrator in professional matters [e.g. see Sociological Dictionary I, p. 298]. This role can be performed by the very expert in the field (e.g. ethics), and moreover, he can use knowledge and skills of experts from other fields of expertise to get specific information on practical problems. For example, he can cooperate with managers, mathematicians, psychologists, teachers, etc.

Expertise is also a specific activity. It can be perceived as a professionally written report, report, evaluation, analysis or project. Talking about expertise, we should answer the question: Who is actually an expert? His position depends, in particular, on the nature of the task which he / she is solving and assessing, and, of course, on his / her relevant erudition. However, the meaning of the word *expert* has a wider scope. It includes also his reputation gained in vocational and professional community (both formal and informal). More important than his erudition and recognition is often an expert institutional classification (the form of co-operation, professional co-operation in the problem area, realistic and professional estimates for practice, ability to respond to a social or important organizational requirement, etc.). Expert activity is generally understood as:

- Requested, mostly narrowly targeted, expert analysis of the problem, or more extensive judgment or report, which reviews a specific situation
- Specialized prediction
- A system of recommendations related to theory as well as practice

- Expert material developed by the team or individual
- Informational material on the results of a research intention, a specific expert analysis
- Information material based on theoretical knowledge in combination with practical (or (practical - research) experience
- Creative confrontation of different perspectives of professionals who are interested in solving the problem in the given area

Expertise is the basis for situation modelling, innovative projects and practices, the practice of change, and unconventional conceptual decisions. Of course, applied ethicists also feel the need (either from the professional point of view or towards the public) to demonstrate the possibility of ethical expertise. In a philosophical field, it was tried by P. Singer, B. Szabados, followed by the others, J. Gaa (1993), J. Dienhart (1995), Z. Bauman (1995), J. Ladd, B. Myskja (2007). The question of expertise is closely related to the development of applied ethics, advocacy of their specific status and professionalization.

As to the conceptual combination of the words expertise and ethics themselves, respectively ethics and counseling, it is very important to understand specific professional competence and to determine practical purpose of each notion. From our point of view, an acceptable and relevant expression for the specific activity of applied ethicists should be *expertise in ethics, counselling in ethics*. Unlike conceptual denotations -ethical expertise, ethical counselling- which express ethical practices in various kinds of expertise and types of counseling, in our case, we place emphasis on professional activities to improve the ethical environment, address specific ethical issues related to practice. The confusion of these terms (ethical expertise/expertise in ethics or ethical counselling/counselling in ethics) can cause not only terminological ambiguity, but also various educational strategies, and finally, the purpose of expertise and counseling. That is why we point out the methodical and methodological importance of the both expressions – counselling in (the field of) ethics and expertise in ethics. This exchange (including translations) can cause serious chaos in preparing specialists for their specific mission, gaining relevant competencies, working in practice. Therefore we always need to clarify the type of ethical expertise or ethical counseling (in our and foreign literature), so we have to realize the basic mission of the given type. Uncertainty, on the contrary, can cause serious problems in determining goals or professional activity in practice.

Subsequently, we will understand expertise in ethics as a versatile analysis of the current moral or ethical problem that causes dissatisfaction or some moral hazard, fear of goals failures or humanity protection. The result of the expertise is a system of recommendations aimed at improving the moral climate, moral respectability of the institution, elimination of risks, proposals of measures concerning the prevention of unethical practices in practice.

Professional competencies and ethical expertise

Today's discussion also focuses, among other things, on the possibilities and usefulness as well as professional competencies of ethical specialists (experts). Basically, the whole issue is about the extent to which we, ethical experts, have the competence to participate in good practice projects. Here we can ask following questions: Are the professional skills of a doctor, engineer, or manager sufficient or is appropriate ethical facility necessary, or is the help of ethical specialists really needed? Skeptics question the role of ethics as a professional competence. For example, J. Ladd takes the view that there are no ethical experts in ethics in the sense of an expert or a professional with some special expertise that other experts do not share. Bjorn Myskja [Genomics, Society and Policy, 2007, Vol. 3, No.1] advocates the view that laic expertise is sufficient, practically effective and fully applicable within the medical field (e.g. in the case of bio-bank management). He justifies its rehabilitation by the fact that professionalism is experiencing the crisis. According to him, the laymen are interested in acquiring some ethical knowledge. He claims that professional and lay knowledge has the same value, although in terms of theoretical demands, lay knowledge does not require special ethical education and skills. In contrast, professional ethical experts meet the requirement of theoretical knowledge, but they may not be more successful (effective) in practice. According to him, expertise can be applied by both types of actors (at lay and professional levels).

Optimists hold the opposite view - an opinion in favor of the concept of ethical expertise. They argue that an ethicist, an ethical expert, should concentrate rather on procedural and formal issues, such as analyzing and clarifying concepts or arguments. The advocate of ethical expertise is also Z. Bauman. He declared, "... the formulation of ethical judgments is (has to be) entrusted to a special kind of people - who can reasonably be presumed to have a status in life that allows them to come easily to universal, timeless and trans-local truth. For this reason, it is desirable for these special people, the ethical experts, to admit a position from which 'common people' have pleasure with special respect". [Bauman: 116]

The expert in the field of ethics can be called *an ethical expert*. "Moral expertise is needed when we find ourselves in a situation where proper negotiation is not possible without the provision of special services." [Bauman: 118] According to him, an ethical expert is a scholarly specialist who is professionally available and able to conduct competent discourse, to use ethical (theoretical) knowledge in solving current moral problems of a serious social nature. Such a problem must be identified, formulated, evaluated as an ethical issue and subsequently solved.

We often meet the view, that experts are people who are well acquainted with practical problems and can make ethical decisions on the basis of a certain set of ethical knowledge. Many experts in the biomedical and business fields share this opinion, too. Professional practice also proves that a specialist in a particular area does not always

have the competence to make ethical decisions. It is not his job unless the certain competencies and positions (work in ethical committees) entitle him to provide professional recommendations or definite decisions. More important, therefore, is an expert institutional role, its admission of an institutional position in accordance with (binding / non-binding) ethical standpoint. However, it is the result based on necessary or appropriate knowledge, targeted ethical discourse, assessment of cases in a paradigmatic context, perception of ethical limits and risks, cultural-value preferences, the ability of balanced consensus, etc. This mechanism is applied, for example, by practices and work in epistemic communities (EU commissions). In terms of professional impact, ethical support, practical efficiency as well as strategic importance, we emphasize the need for knowledge of certain rules, procedures, methodologies, and so on. Good practice is usually the result of rational decisions, professional co-operation, moral responsibility, reflection of the moral importance of decision-making towards future practice, certain balanced positions of moral practice and ethical theory. This approach also reflects the concept of postfundacionalism as a methodological paradigm that has been promoting in applied ethics for the last decade.

On the other hand, even the most erudite ethical theoretician with excellent philosophical disposition will fail or will be hardly accepted if he does not have adequate skills needed for application and institutionalization of ethics as well as if he misses knowledge of concrete practice.

In principle, therefore, we can talk about following two types of experts:

1. Persons whose expertise depends on what they should know (epistemic expertise) - expertise in normative ethics, descriptive ethics, metaethics; they should focus rather on understanding goods in historical continuity, the imagination of good life and human acceptability of activities, the possibilities of ethical theory for practice, the formulation of ethical frameworks, more general ethical recommendations to practice.
2. Persons whose expertise is related to what they have to do (performative expertise). In essence, it is about their knowledge of good life in practice, good practice.

Applied ethicists as experts in ethics should learn and know how to use both sides of expertise and gain both competencies.

By addressing the issue of experts in ethics in accordance with their specific dispositions, they are often called epistemic authorities. This term is used to express a distinction from the so-called laic experts. This way of thinking also deserves our attention, mainly in relation to the mission of applied ethics. For the purposes of this consideration, the relationship between the expert and layman is based on epistemic inequality. When comparing the amount of expert knowledge, we find out, that an expert - specialist has got more of it than an expert-lay (practitioner). And if a layman refers to an expert's judgment, he usually does so because he recognizes its superiority. So the relationship between the expert-specialist and expert-layman should be based on rational respect for epistemic authority

or on seeking balanced positions of theory and practice. The notion of rational devotion presupposes that a layman refers to a specialist and recognizes the expert's rational authority. It is clear, that we sometimes have to contact an expert. In such a situation, a layman should recognize the authority of an expert otherwise the knowledge of an expert may be socially labile and practically irrelevant. So appealing to epistemic authority and rational devotion also has a social dimension. An expert's opinion can change the lives of many people and also require a certain amount of knowledge, ethical knowledge.

Ethical expertise is still problematic not only in professional communities, traditional professional and profession fields, but also in public life. Paradoxically, ethics in its verbal form is accepted as a positive phenomenon and a formal value requirement. From an expert point of view, it is still at the periphery of professional, profession and practical interest. However, we still declare it - in public politics, social efforts, public- as a condition of social prosperity or better practice. Applied ethics as a practical strategy is not about declaration or identification of problematic areas in moral practice. It is about active support, ways of solving moral problems, institutionalized service for practice. The idea of good life, ethical strategy, happiness is still absent in national strategies, important organizational documents, social and corporate visions. It is evident that we are inadequately aware of the importance related to moral imagination, imaginative sympathy, and a vision of good life. On the other hand, it is positive that the idea of happiness is being promoted today not only within the framework of indicators and assessments of social credibility, but also at the institutional level (we have already registered three ministries of happiness).

We should also be aware that we are going through complex value changes in the economic, cultural and technological spheres. They highlight the urgent challenges of coping with cultural pluralism and migration processes, the formation of a new paradigm known as Society 4.0, or the risks of intelligent technology. We should take them in account as basic changes of an innovative nature requiring original approach and solutions. These are serious challenges for ethics. They can help to minimize or rationally master the moral risks. Traditional ethics without an application strategy can hardly offer constructive solutions and institutional procedures. Qualitatively more demanding and epistemological ideas with higher constructive efficiency require for new interdisciplinary dialogue in completely new areas and dynamic processes of changes.

It is not possible to strive for a good life without the idea of good and moral imagination, but it is more important to combine this idea and effort with appropriate ways related to transformation of values and norms into practical life. We are convinced that the implementation option is real and significant. However, it must meet the conditions of professionalism, knowledge of implementation procedures, theoretical knowledge and skill levels. Like any other professional areas, it needs systematic preparation and expertise at the required level. This disposition is called ethical expertise or expertise in ethics as a specific professional quality.

Professional dispositions in applied ethics

We can say that expertise or expertise in ethics is promoted on several levels:

- Expertise in the field of ethics is not only the theoretical and methodological disposition but also application-practical ability. Therefore, we emphasize, that ethical expertise includes besides the theoretical and ethical aspects, the disposition to transform these theoretical starting points into practical life and a real mechanism of social life as well as to integrate them flexibly with practical requirements. It is, therefore, rather a specific competence concerning to the application of ethical knowledge, a creative disposition of specialists to integrate ethical-theoretical knowledge, and expert evaluation of their functioning in a certain area of practice. This goal should also be addressed by the specialized training of ethical experts. Such an expert should have the ability to give an advise how to implement a certain intent with ethical support and which way is suitable for implementation of ethical prevention tools. His dispositions should be helpful in addressing the issue how to introduce the tools into active life and gradually strengthen their effectiveness. It is necessary to identify with the fact and the professional role that the creation of ethical support mechanisms (moral and social integrity, ethically responsible behavior, moral credibility, etc.) is a long-term issue related to organizational development, the development of ethical culture, the preparation of personalities for ethical decision making, the formation of an ethical environment, the supervision of unfair practices and their solutions, personal trust as well as trust towards the stakeholders and the public. To fulfill this task of expert activity means to master and manage ethical analyzes, have knowledge of what to analyze, know how to judge in the context of the latest knowledge from applied ethics (knowledge of tools, methods, value preferences and contextual specificities, real possibilities, transformation cycles in setting ethical mechanisms). Additionally, an application specialist should have some communication and psychological ability. He should be restrained in evaluating and assessing the current state of ethics in that area, he should express his judgements and proposals only when he gains sufficiently strong conviction and arguments for ethical change. In other words, he can act so only when he gets rid of doubts about ethically - theoretical and practical inconsistency. The quality of the expert ethical behavior depends on the following circumstances: on our effort to remove communication barriers to ethics and overcome the atmosphere of distrust, and gradually acquire people for ethical policy. Setting ethical mode therefore lasts for several years and requires endurance, coaching, and training. Expert and consultancy activity in ethics requires a fairly complex catalog of dispositions obtained not only by the study but also by his own appropriate complete profiling. A person becomes an expert after studying offers related mostly to the theoretical-methodological frameworks and proven methodological recommendations, presentation of his creative work, mainly in the final thesis.

- On the conceptual level of application-ethical efforts, we emphasize another professional aspect and competence - the ability to respond to current social problems. Social sensitivity should therefore be an attribute of professional competence in applied ethics. Identifying key issues and knowledge of social trends and risks are the prerequisites for successful application of an applied ethicist as a professional actor of change. A variety of issues are usually presented in the area of social ethics or global ethics or its sub - disciplines. Applied ethics has to shape its position in the relation to the political field, macroeconomic trends, legal sphere, migration and multicultural trends, integration processes, developing world, environmental situation, human and animal rights, revolutionary changes in the world (e.g. "Industry 4.0" or "Culture 2.0"), the formation of artificial intelligence and the impact of social networks up to biomedical trends and manipulative risks. The range of topics and issues is broad and requires not only the implementation capability but also the search for arguments with regard to decision-making within social strategies. Therefore, an applied ethicist in his preparation overcomes practical and close professional trends. We must deal with particularism, one professionally framed disciplinary area, but also with theoretical universalism - an idea of the validity of only one ethical theory, or of a universal catalog of principles.
- Despite criticism of particularism, we are promoting the methodology of open, wider and balanced approach to moral problems in professional training. It is a matter of ethical theories as well as the interactive influence of individual fields of applied ethics. Individual applied ethics promote open discourses, intersections of methodologies, and a common strategy - the possibility to apply ethics. Therefore, ethical expertise should be built on multifunctional training and the acquisition of the best methodologies of applied ethics sub - disciplines. For example, issues including sustainability or Industry 4.0 should be reflected in a multifaceted approach way because theoretical reductionism with its particular scientific claim can create risks in the other area. Processes are deeply interconnected and require broader interdisciplinary perceptions and solutions. Therefore, we see interdisciplinary openness as an important part in the preparation of specialists for the application of ethics and in elimination of ethical risks.
- This does not mean that an expert in applied ethics is a specialist in all areas. In this case, it is important to have a specialization for the expert role in ethics, for a certain area of activity, for deeper profiling in a certain area, acquiring a stronger theoretical potential, gaining application technology in some important area. Respectively, an expert can confirm his attestation in the scientific community, international associations, professional communities and networks. He should be able to perceive the wider context of professional competence, the practical utility of methodical paradigms and strategic tasks in applied ethics.

He should have to deal with some partial theoretical and practical questions on ethics. For example, he is considered as an expert in our field when he is able to take and advocate his own view on discussed issues in applied ethics, the dilemmas related to theoreticians and anti-theoreticians, particularists and universalists, fundacionalists and post-functionalists, and so on. This problem is about a solution of application strategies and can deform the social role of applied ethics and their acceptance. The success of good practice projects depends on sensitive choosing the right concept, from all the given, that should be applied in our strategies and can also be effective in real-life practice.

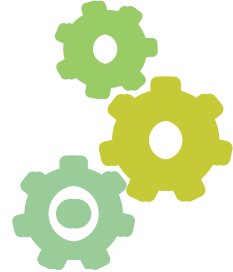
Basically, we have outlined a catalog of preferred disposition important for the implementation role of applied ethicists. Similarly, as in economically advanced countries, we also feel very seriously the preparation of professionals in this field as well as the claim of our more important role in the frame of influencing social processes. Our effort is still not reflected as an active component of transformational change, social strategy, innovation processes, and interdisciplinary research. The catalog of job positions also misses our implementation role because organizations perceive this professional qualification or ethical investment as something extraordinary, over-standard, secondary. Therefore, we support, for example, the adoption and acceptance of the Law on Ethical Audit, Investment Ethics, and establishment of Ethical Ratings Agencies. We believe our efforts to help practice and ethical revitalization of the society will be sufficiently convincing and accepted as soon as possible.

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Daniela FOBELOVÁ¹

Implementation of anti-corruption tools – the path to increasing ethical culture

Abstract

The question of corruption today is not just a legal, economic or political problem, but even if not an ethical problem. Its solution requires a systemic and comprehensive solution, the synergy of various tools and mechanisms. Organizational culture plays an important role in the corporate environment. If properly set up and supported, it can serve as an effective mechanism of ethical support and the promotion of good practice. The causes of corruption may be weakened or even excluded, perceived rather as inappropriate and rated as incompatible with expectations. A suitable tool for promoting ethical culture is also becoming the ISO 37 000 standard. We will point out its attributes and the appropriate way of building ethical culture in organizations.

Keywords: applied ethics, negotiation culture, ISO standard 37001

Wdrażanie narzędzi antykorupcyjnych - droga do podwyższenia kultury etycznej

Streszczenie

Problem dzisiejszej korupcji to nie tylko problem prawny, ekonomiczny czy polityczny, ale nawet jeśli nie jest to problem etyczny. Jego rozwiązanie wymaga systemowego i kompleksowego rozwiązania, synergii różnych narzędzi i mechanizmów. Kultura organizacyjna odgrywa ważną rolę w środowisku korporacyjnym. Jeśli zostanie odpowiednio skonfigurowany i wspierany, może służyć jako skuteczny mechanizm etycznego wsparcia i promowania dobrych praktyk. Przyczyny korupcji mogą być osłabione, a nawet wykluczone, postrzegane raczej jako nieodpowiednie i oceniane jako niezgodne z oczekiwaniami.

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Odpowiednie narzędzie promowania kultury etycznej staje się również standardem ISO 37 000. Wskażemy jej atrybuty i odpowiedni sposób budowania kultury etycznej w organizacjach.

Słowa kluczowe: etyka stosowana, kultura negocjacji, norma ISO 37001

Instead of the introduction

We have fairly enough historical sources to confirm that people have always been giving each other gifts. This was not just a matter of personal relationships. Gifts were an integral part of official missions, visits, meetings. Differences in receiving and giving presents can be seen in different cultural and moral contexts. Of course, our Christian culture is, without any side intentions, connected with the three sages from the East who brought symbolic gifts (gold, myrrh, incense) to the newly-born messiah as a manifestation of respect and thanks for his coming to this world. Both in ancient times and today, the role of gifts is to make a welcoming atmosphere more pleasant - in relationships or negotiations of any kind. In the „western” countries of the world, the gift mostly causes joy to the gifted person, while in the „eastern” ones greater joy is brought to the donating person. The bond between the donor and the gifted person is always the deliberate act of giving. However, each activity has two sides of action - positive and negative. The negative one is a form of coercion, coinciding (demanding) reciprocity. From a moral point of view, this affects the instrumentalization of relations between people and, in this case, consequently devalues ethical values such as solidarity, honor, selflessness, responsibility or respect. Gifts become so easy bribes. Their only goal is an effort to avoid an increasing investment (required in normal circumstances) through an unofficial and often illegal way. Ultimately, bribes may not only be money or material gifts, but especially beneficial favors, transfers of deficient sources, convenient places, etc.

Corruption is as old as humankind itself. Only its forms have changed, but it still remains in two classic forms. Direct one (in passive and active form) runs face to face or hand-to-hand. Indirect one goes through a negotiator or related persons. Criminal law takes into account all those forms. Even though all the parties involved are affected, corruption does not lessen. In contrast with some Asian countries where they have zero criminality and are punishable in this area by criminal law, we, applied ethicists, try not to “extinguish” but rather prevent this unfair, immoral acting. The situation, however, seems that people in western civilization have lost their shame and therefore have no barrier to warn against immoral actions such as corruption, bribery. Corruption continues to be a serious social issue affecting politics, government and public administration with their subsystems, as well as the private sector. From the legal point of view, Europe has been looking for an effective legal instrument to fight corruption since the end of the last century or millennium. Beginning with the

Maltese Conference of European Ministers of Justice (1994) through the establishment of the Committee of Ministers of the Council of Europe with its Anti-Corruption Action Program (1996), the Criminal Law Contract on Corruption (1999) as well as Civil Law Treaty on Corruption (1999) we can see the effort to fix on a legislative basis for corruption mistreatment on a transnational scale. But how to prevent this global social problem from being able to manifest itself in some form, we can find in none of those documents. The form of whistleblowing is only understood as an „extinguishment“ - „inhibition“ of premeditated corruption.

Another region - another morality or guanxi in theory and practice

Countries of the world focused on „good relations“ with a partner, on so - called pro-partner cultures follow the rule that any matter is negotiated through relatives, friends, acquaintances, through a connection - thanks to the existence of good relationships. The Chinese call these useful links by a well-known word throughout eastern and southeast Asia: guanxi. As the world market research suggests, there are definitely more pro-partner cultures (the Arab world, Africa, Latin America, and most of the Asia Pacific countries) dependent on interpersonal relationships with a complicated network of personal contacts than pro-transactional ones that emphasize only the transaction itself. Acquaintanceship with the right people, ownership of the corresponding contacts helps to negotiate matters in other cultures. Even in the US trade (transaction) market there are such people who „pull on laces“ or „use the influence“ to gain something. Whereas in pro-partner culture it is perceived positively, and naturally, in pro-transactional culture it can be considered bribery and corruption.

Getting familiar with the right people in this part of the world is really necessary for the beneficial proceedings. It is impossible to implement business, culture, or any activity without ownership or use of „guanxi“. In pro-partner-oriented cultures, people usually plan the way of penetration into a potential client or partner. There are several ways to achieve this goal - during a mission (business, cultural, political), meeting on the events (market, cultural events, etc.) or using an intermediary, the third person who „owns“ guanxi. If someone tries to make direct contact, he will not succeed. This rule is valid twice for foreigners. The only way how to „get around“ is to prepare for „special costs“, that means, to give bribes that make officials´ work easier, plus official costs, which will be increasing (for example, during a several-month or year´s registration) and eventually they can reach a considerable amount. Finally, what seems to the Westerner immoral - the connection, the „ownership“ of corresponding acquaintanceships that is equally natural for both parties in the eastern culture. Two worlds different in cultural and moral contexts strive for success and, of course, for benefit. Who will be the judge in a different understanding of moral rules in another cultural context, cultural environment?

Organizational culture as an effective mechanism of ethical support for the promotion of good practices

An organizational culture, presented as a set of values, attitudes, standards and patterns of behavior experienced in the organization, affects the internal functioning and efficiency of the organization. However, if we understand the organizational culture as the way of perception and thinking prevailing in the organization, we can say that it also fulfills the external function by influencing the organization's strategic behavior and its adaptation to the environment.

Organizational culture therefore has a normative meaning, which is reflected mainly in the behavior of its members. The organizational standard determines what behavior is expected from members of the organization, what behavior will be treated as undesirable and what behavior, on the contrary, will be judged desirable and therefore rewarded. Corruption, bribery will definitely be included in the undesirable one, mainly from the long-term intention of the organization and the effort to preserve its good name. At present, organizational culture is an indisputable key component related to implementing the organization's mission and strategy, and improving efficiency as well as managing changes or innovations. We know that each organization has its own culture, so we can also claim that it has a certain ethical strategy, we mean, its own an ethical approach to solving moral problems, ethical dilemmas. The ethical orientation of the organization can be reflected in a clearly defined and accepted form of the ethical program.

One of the most important elements of organizational culture is value. As we have emphasized several times, it is necessary to distinguish two following basic types of values:

1. Organizational values that are defined as the organization's work goals (eg. customer service, team work, product and service quality, value of money, profiting - profit, shareholders' interests).
2. Ethical (moral) values in an organization related to the organization's ethical approach to the stakeholders (eg. decency, responsibility, principle, respect, transparency, justice, etc.).

The first responsible step in creating an ethical organizational culture should be to recognize the culture the organization wants to create, change and innovate. Ethical tools written on paper only without their application in practice are just a breeding ground for the moral failure of people. The relationship between organizational culture and organizational ethics has an innovative character for every contemporary modern organization. We perceive organizational culture as theory and practice, too. Practice follows the way of behavior characterized by the maintenance of symbolic forms as well as acting oriented towards the culture of relationships in accordance with the realization of the organizational goals. Organizational ethics is aimed at affecting ,good', ,blessing', ,happiness', ,better life' by learning about the ethical values and norms that support its

achievement. An intersection between organizational culture and organizational ethics is the joint management of soft instruments and the declaration of important intangible factors. Organizational culture and organizational ethics are in an interactive dialectical relationship. Organizational ethics represents a higher quality of organizational culture, its moral acceptance as an important part of behavior and the achievement of organizational goals. Organizational culture is an important part of the organizational system and thus a prerequisite for successful change. Anti-corruption premises include compliance with ISO 37 001:2016 Anti-Corruption Systems - Requirements with Guidelines for Use. As stated in short annotations, it is a document defining a management standard to help organizations combat corruption by creating a culture of integrity, transparency and compliance. The anti-corruption system can be a stand-alone system or it can be integrated into an already-implemented management system and the ISO 9001 quality management system. The organization may implement an anti-corruption system along with other systems such as, for example, quality, environmental or safety systems. Many critics or skeptics of the mentioned standard see it as a legal document that should be clear and unambiguous. Critics claim this standard is concerned only with management systems and do not evaluate it as a comprehensive standard for combating fraud or anti-corruption. Proviso in the legal assessment is an acceptable feature for applied ethics. If many requirements are qualified as „appropriate“, this is consistent with the requirements of ethical balance (coherentism) and cultural and moral context (contextualism), as stated, for example, when applying guanxi. The principles of cultural and moral ethnocentrism or universalism will not work and will not help anyone.

A suitable tool for promoting ethical organizational culture is now the ISO 37 001 standard which can serve to strengthen the fight against public and private corruption, bribery. It is an international standard specifying the requirements but also providing a guide for the creation, introducing - implementation, maintenance and improvement of the anti - corruption system. In the European area, it creates following advantages for implementers:

- Minimum requirements and guidelines for the implementation or comparison of the bribery management system (this standard is based on the high level ISO standard for management system standards). It can be easily integrated into other existing management systems (such as, for example, quality, environmental protection, safety)
- Guarantees for managers, investors, business partners, employees and other stakeholders in the sense, that the organization is taking appropriate steps to prevent corruption. (although the organization cannot ensure 100% guarantee for bribery elimination, certification might help to introduce reasonable and appropriate measures, which can significantly reduce the risk of corruption or deal with it if it occurs)

- Judicial evidence that the organization has taken reasonable and appropriate measures to prevent corruption (the introduction of an anti-corruption system requires a moral model for top management, a presentation of an organizational strategy and policy, an ethical program that must be communicated to all employees, external parties - suppliers, partners and the others.)

The most important moments of ISO 37 001 can be summarized into following concrete, reasonable and proportionate recommendations:

- Create and implement anti-corruption program.
- Get familiar with it all those involved in the organization.
- Mandate the compliance officer/ program supervisor.
- Provide training on anti-corruption (of specified professional type).
- Evaluate the risks of corruption, including adequate protection.
- Introduce reasonable and proportionate measures to ensure that organizational bodies, as well as their partners, perform adequate controls related to anti - corruption.
- Verify which employees and the extent of their share in the anti-corruption program.
- Provide control in accordance with gifts, attentions and other benefits received by employees, their relatives and thus preventing corrupt purposes.
- Introduce reasonable and appropriate financial, commercial and public procurement to avoid the risk of corruption.
- Implement reporting procedures - (whistleblowing).
- Investigate any suggestion of corruption or action that would lead to corruption.

Conclusion

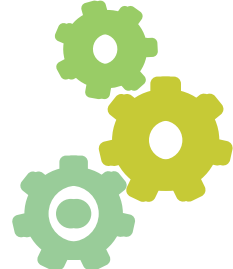
Of course, it should be stressed that, in the case, if the measures were in conflict with the applicable law in the jurisdiction, the regulation will introduce an exemption. It is no secret that corruption is booming worldwide. The World Bank estimates that each year more than \$ 1 trillion is paid for bribes having catastrophic consequences including disruption of political stability, increase of business costs and contribution to greater poverty. At the global level, corruption is a major barrier to international trade, while in the frame of the organization it has a fundamental negative impact on (working) morale of employees. Fighting corruption is a long-time effort for many organizations. Systematic changes against corruption, hand in hand with a corresponding ethical organizational culture can make a significant contribution to combating bribery and significantly complement national as well as international measures related to ISO 37 001. In such a way we can ensure the sustainable development of countries, organizations and humankind at all.

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Liliia HRYTSAI¹

Contemporary consumerism vs sustainable consumption

Abstract

In the contemporary world we can distinguish two types of consumer behavior, which opposed each other. The first one is the currently prevailing consumerism, that is, the excessive appreciation of material possessions, while the second type is sustainable consumption, which refers to the high social responsibility, green economy and various environmental-friendly attitudes. The main purpose of this article is to present sustainable consumption ensuring sound planet's conditions for future generations as a solution on contemporary consumerism, which provokes inequalities, overuse of natural resources and moral degradation.

Keywords: consumer behavior, consumerism, sustainable consumption, sustainable development

Współczesny konsumpcjonizm vs zrównoważona konsumpcja

Streszczenie

We współczesnym świecie możemy wyróżnić dwa rodzaje zachowań konsumentów, które są sobie przeciwstawne. Pierwszym z nich jest obecnie dominujący konsumpcjonizm, czyli nadmierna koncentracja na dobrach materialnych, drugim zaś, jest konsumpcja zrównoważona, która wiąże się z wysoką odpowiedzialnością społeczną, zieloną gospodarką i przyjazną dla środowiska postawą. Główny cel niniejszego artykułu to przedstawienie zrównoważonej konsumpcji zapewniającej zdrowe warunki planety

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dla przyszłych pokoleń jako rozwiązanie dla współczesnego konsumpcjonizmu, który wywołuje nierówności gospodarcze, nadużywanie zasobów naturalnych i degradację moralną.

Słowa kluczowe: zachowania konsumentów, konsumpcjonizm, zrównoważona konsumpcja, zrównoważony rozwój

1. Introduction

Consumerism as a social phenomenon appeared at the end of the 19th century as an effect of mass culture and industrialization. Economic development and increased production of goods and services made these goods available not only to the higher social stratum, but to the broad masses of the population. Starting from the 1950s, the role of consumption in human life constantly grew. It becomes an attribute of modern civilization and the consumer is its key figure. Manufacturers have come to the conclusion that the product should be constantly improved to increase its final value.

Consumption is understood as a determinant of the quality of life of a modern man who feels a constant desire to acquire new products and use new services. Consumerism means excessive consumption of material goods and services, and is driven not by real human needs, but apparent needs [Marron 2009, s. 727].

Nowadays, consumption ceases to be associated only through the prism of goods used – it is a complex social communication process related to the exchange of meanings and symbols, indicating specific consumer practices emphasizing the lifestyle of consumers. Theories regarding consumption and consumer behavior are becoming more and more focused on the recognition of individual actions and are under the strong influence of social sciences and humanities. The understanding of the consumer category itself is also changing. One of the contemporary ways of interpretation is to consider the consumer as a sender of a message or specific signals to other people, but also to himself. In the socio-psychogenic sense, it is designing different dimensions of the reflected and subjective self, often associated with the image of a consumer seeking his own identity. Thus, consumption becomes not only an economic, but also a cultural process through which individuals and groups design self-esteem, establish and maintain social relations and communicate meanings. Interdisciplinary approaches to consumption and its comprehensive conditions allow to avoid the often simplified way of analyzing complex phenomena in consumer behavior [Glickman 1999, s. 100].

The main aim of this article is to discuss the idea of Sustainable Development as a solution to the modern-day consumerism. Nowadays, consumerism is not only an economic pattern, but it became a complex social phenomenon determining lifestyles of

millions people worldwide. The study argues consumerism has negative impact on both communities and individuals, i.e. consumerism's extravagance, creation of inequalities, high environmental and social costs, moral degradation, collapse of traditional values, etc. Consumerism leads to the mass over-consumption and waste of resources globally, which strongly undermines the future of mankind. The article suggests sustainable consumption as the most appropriate and reasonable solution to the contemporary consumerism. Transformation from consumerism to sustainable consumption requires a high social responsibility and environmental awareness. Promotion of sustainable development as a new lifestyle will increase the rational choices for the current generation as well as the chances for a healthy and peaceful life for future generations.

2. Contemporary Consumerism

Consumption is an elementary necessity of life, the basic fact of life, the goal and means to maintain it. Satisfying the basic human needs was replaced by the pursuit of satisfaction through consumption. This applies to needs that exist in different dimensions, both material and non-material. It also applies to services, places or experiences. Consumption has entered such areas of social life as family, religion, leisure or art. It determines the shape of life aspirations, dreams and desires. As a result of economic growth, consumption was promoted to the rank of the basic value and determinant of life success. It is the engine of the capitalist economy. Consumption does not only penetrate our lives, but it absorbs more and more. The possession of goods and the orientation of life focused on gathering becomes an end in itself. The most important rule is to earn money and spend it [Goodwin 2008, s. 2-3].

Consumerism is blamed for many negative phenomena, such as lack of relation to real needs or disregard to individual, ecological and social costs. Consumption in this approach concerns satisfying secondary values related to the desire for power, prestige or a higher social position. Treating consumption as a value in itself leads to the development of such phenomena as mass entertainment, the commercialization of sports spectacles, development of the enveloping and apparent needs [Goodwin 2018, s. 4-5].

Consumptionism evokes the cult of objects, removes such values as solidarity, community, mutual interest in the fate of others, determines the hierarchy of values subordinated to the tendencies of acquiring and possessing. It leads to competition, dissolution of personal ties, deficit of deeper spirituality, and according to some scientists, to disorganization and many deviant phenomena. Consumption, becoming the dominant tendency of life, transforms these phenomena of disorganization into a norm and lifestyle [Denisoff 2008, s. 10-12].

In the modern world, however, consumerism has also many defenders. They emphasize that consumption is conducive to achieving happiness, saving time and energy that has been used in unnecessary activities. Consumption enables the exchange of opinions,

leads to the social communication system, as well as the common consumption of intangible goods, i.e. literature, film, music, etc. It also provides individuals with stability and self-determination. Defenders of consumerism ensure that by acquiring noticeable goods, we have more time for family, friends or regeneration of the body's own strength. Contemporary consumer is not a mindless creature manipulated by advertising and media, but the creator of culture and civilization, which is directly influenced by consumption [Marron 2009, s. 80-82].

Consumption determines the social position, shapes the image of the individual in the society, defines the values that guide him. These values determine human behavior, and differentiate between aspirations and individual choices. In today's societies, the sphere of consumption has taken over most of the functions that have been carried out so far in other areas of human life, such as work, family, culture or religion. Consumption and desire to possess have become the highest value. A man who does not have an economic dimension does not exist. Contemporary society sees man through the prism of the consumer, who efficiently and without delay responds to market temptations and contributes to the development of the economy. People with limited resources who are out of this standard are stigmatized and pose a problem for the development of consumption [Vincenzo 2018, s. 68-70].

The budget constraints are increasingly a hindrance to continuous consumption, because the consumer can easily bypass them by borrowing. Consumption „on credit“ has created the illusion of unlimited consumer possibilities. You can apply for a loan not only in financial institutions such as banks or credit units. According to the Credit Information Bureau Report, loan companies tempting people with advertising slogans such as „cash on hand“, „credit for everyone“ or „loan for any purpose“. An equally popular form of consumption for loans is the installment sale offered by retail outlets [Vincenzo 2018, s. 80-81].

The means of consumption were once far away. Most people had limited resources for consumption, and the promotion of Sunday as a day of rest limited the possibility of consumption. Night was a powerful obstacle. Today, thanks to modern forms of transport, the invention of electricity, as well as new forms of consumption, such as 24-hour shopping centers and online sales, consumption barriers have been ceased to exist. Consumption is possible from dawn to dusk, at any time of the day or night. In addition, you can do shopping without leaving your home [Chatriot, Chessel 2006, s. 57-59].

3. The future perspective

Excessive and unsustainable consumption is the result of rapid economic growth, initiated in the second half of the 20th century, industrialization and urbanization of individual regions and countries, and increased wealth of societies. Growing quality of life and technical progress in production processes have led to consumption to a large extent

exceeding the actual needs of the modern consumer. Uncontrolled consumption leads to the degradation of the environment through excessive exploitation of renewable and non-renewable natural resources, contributes to the waste of goods and human labor, as well as creates significant economic disparities between people [Miles 1998, s. 12-19].

These disproportions are particularly noticeable between the inhabitants of highly developed countries, who constitute only one-fifth of the world's population, and the inhabitants of the countries of the global South. According to the World Business Council for Sustainable Development – WBCSD report, the vast majority of inhabitants of the developing countries are people living in poverty. Half of the world's population spends less than \$2 a day. Almost a billion inhabitants of the Earth suffer from malnutrition. On the one hand, there is a constant desire of developed countries to increase the level of production and consumption, and on the other to exploit natural resources in the least developed countries. The effect of this is degradation of the planet's ecosystem at 60% in the last 50 years. At the same time, the world's population is increasing every year. It is estimated that by 2050, the number of inhabitants of our planet will exceed 9 billion. This population will have to adapt to the conditions that will then prevail on Earth [Wasilik 2014, s. 68].

Nowadays scientists warn about the negative effects of human activity, such as climate change, limited access to drinking water associated with rising sea and ocean levels, the problem of hunger and malnutrition in the world, the spread of diseases, the extinction of many plant species and animals or weather anomalies. According to the World Wide Fund for Nature – WWF report, by 2030, natural resources from at least one more planet will be needed to meet human needs at the current level. There are many opinions on this issue, however, regardless of the level of risk realities, it is certain that the model and structure of consumption require global changes [Wasilik 2014, s. 68].

4. Sustainable consumption as a solution

The scale of the threats resulting from excessive consumption has led to the creation of a new model of modern consumption – conscious and sustainable consumption. Sustainable consumption is an element of the idea of sustainable development, i.e. development that seeks to improve the quality of life while maintaining social equality, biodiversity and wealth of natural resources. This idea combines economic development, environmental protection and social justice on a local, regional and global scale. Sustainable consumption means, therefore, meeting needs in a way that does not diminish the ability to meet the needs of future generations [Morawiak 2015, s. 290-291].

The practical implementation of the concept of sustainable consumption has become the primary objective of the European Union's activities in the area of environmental protection policy and consumer policy, aimed at striving to raise consumer awareness,

as well as strengthening their rights in accessing product and producer information and ensuring the safety of the products offered. Consumer education is also needed, which would be focused on the goals and objectives of sustainable development, as well as on the implementation of sustainable consumption principles in everyday life [Morawiak 2015, s. 292].

One of the most important factors leading to sustainable consumption is the growing awareness of consumers. A conscious consumer is a person who collects information about a product and at the time of purchase has a lot of knowledge about it. It is a person inquiring about the origin of the purchased product, its composition, production methods or social responsibility of the producer. A conscious consumer is also a reasonable person with respect for the natural environment. Increasing awareness has contributed to the creation of a new consumer profile that is demanding, rational from the point of view of purchase optimization and more mobile, both in the real and virtual world. This affects his purchasing decisions, which in the longer term shapes demand as well as generates changes on the market [Miles 1998, s. 20].

Another trend that brings contemporary consumption closer to sustainable consumption is eco-consumption. It is consumption oriented towards environmental protection. The production of organic food takes place in a way that does not damage the ecological balance, using natural methods, without the use of artificial fertilizers, synthetic plant protection agents, antibiotics or genetically modified organisms. This method of production ensures the purity of groundwater, protects the soil from pollution and limits the leaching of nutrients from them. The main goal of organic farming is the production of high quality food, while caring for the natural environment [Glickman, 1999, s. 108].

Among the current trends in consumption convergent with the idea of a balanced development, we can also mention consumer ethnocentrism, or preference for domestic and local products. This is not about the complete cessation of trade between countries, but about the rational selection of imported products. Ethnocentric consumption encourages both the selection of regional products and the consumption of products according to their seasonal nature, thus supporting the natural environment and local food producers [Morawiak 2015, s. 292].

5. Transition from Consumerism to Sustainability

The preference for simple life promotes conscious and responsible consumption, not limited to here and now. Does a simple lifestyle make us give up everything? Of course not, we give up what is beautiful externally, but artificial and empty, in favor of the beautiful inward. We save, but do not become misers; we buy wisely according to the needs and then the quality of our existence. Simplicity solves many of our problems, frees us from prejudices, limitations and stressful situations. Minimalism teaches us to care about details.

A simple lifestyle is a counterweight to consumerism, teaches the consumer to search for information about products, not a capricious, thoughtless satisfaction of their desires [Marron 2009, s. 730].

The desire to limit excessive consumerism, exceeding the limits of rational choices, caused that deconsumption trends also began to appear. The factors promoting deconsumption are the rejection of unhealthy and irrational life for pro-health awareness, slowing down the pace of life, treating consumption as a means of life, not a goal, as well as protection of the natural environment and its non-renewable resources. Such a civilization could be called a „civilization of optimal consumption“, which is economical, but satisfying the need of real units of society, as well enabling development in all dimensions of human existence. Sustainable consumption emphasizes our needs and our style, combining what we have with who we are. Our style can say „no“ to fashion excesses, it is a mainstay of simplicity, beauty and elegance. Fashion could change, but the style remains. Our consumer choices are to improve the quality of our lives, and not to harm future generations or the environment [Vincenzo 2018, s. 90].

Consumption is an integral part of the individual's functioning in society. We do not live in isolation, we imitate the patterns functioning in the environment, also those related to consumption, which creates the possibility of getting infected with consumerism, the excessive desire to have everything that others have. The desire to possess fills the existence of the individual and spreads very fast. This attitude leads to the disappearance of humanity, deprivation, frustration and degradation of our environment and natural resources [Chatriot, 2006, s. 73].

The limitation of consumption and its rationalization will ensure security and development for future generations. This requires the society to change the lifestyle, increase awareness of buying and consuming. It also requires some effort to reduce, recover or re-use products. The promotion of a simple lifestyle indicates that a man should have the necessary amount of things, so that they do not become a trap and limitation for him, on the contrary – they were the foundation and the guarantor of spiritual development [Wasilik, 2014, s. 70].

Sustainable consumption is not a temporary fashion, it is a necessity of our time, and it is the last bell before the destruction of the environment in which we live. Our planet's resources are limited, so it is the responsibility of every individual to turn towards sustainable consumption. Limiting new needs and changing their character and structure will allow responsible consumption of all existing goods. Satisfying basic needs will minimize the use of natural resources, allow for a strategy of social responsibility and will not limit the rights of future generations to conscious consumption [Wasilik, 2014, s. 70].

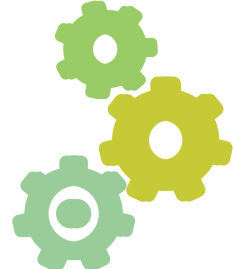
6. Conclusion

Excessive consumption leads to the satisfaction of unwarranted needs and overuse of natural resources, which results in the deepening environmental degradation. To prevent this we need to impose changes in the structure and model of contemporary consumption, which would take into account the consumption needs of both present and future generations through the conscious use of the benefits of the natural environment. The sustainable consumption model assumes consuming products and services in such a way as to minimize the consumption of natural resources, especially non-renewable ones, as well as to limit the amount of waste generated during consumption. If we would be able to control our consumption, we would gain a chance to increase the quality of our life, i.e. healthcare, safety, education, work and social status, the state of the natural environment and social justice.

To increase the importance of sustainable consumption, it is necessary to educate the society, leading to a change in the perception of the quality of life exclusively through the prism of consumption. It is necessary to realize that the constant satisfaction of material needs only provides an apparent sense of happiness and life satisfaction.

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Attributes and trends of ethical policy in business environment in Slovakia

Abstract

The value environment in Slovakia requires systematic assessment and constructive solutions. The ethical risk is considered especially the business environment in Slovakia, where the value changes as well as the adaptation processes are taking place in the context of the new standards of the modern style of entrepreneurship. The penetration of business culture from abroad requires a sensitive response to multicultural challenges as well as the promotion of good ethical standards and regimes. We will offer our results from the assessment of the ethical business environment in Slovakia, its main problem areas as well as suggestions for solution.

Keywords: applied ethics, business ethics, postfundational paradigm

Atrybuty i trendy polityki etycznej w środowisku biznesowym na Słowacji

Streszczenie

Środowisko wartości na Słowacji wymaga systematycznej oceny i konstruktywnych rozwiązań. Ryzyko etyczne dotyczy przede wszystkim środowiska biznesowego na Słowacji, gdzie zmieniają się wartości, a także procesy dostosowawcze odbywają się w kontekście nowych standardów nowoczesnego stylu przedsiębiorczości. Penetracja kultury biznesowej z zagranicy wymaga wrażliwej reakcji na wyzwania wielokulturowe, a także promowania dobrych standardów etycznych i reżimów. Nasze wyniki przedstawimy

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na podstawie oceny etycznego środowiska biznesowego na Słowacji, jej głównych obszarów problemowych oraz sugestii dotyczących rozwiązania.

Słowa kluczowe: etyka stosowana, etyka biznesu, postfundamentalny paradygmat

Instead of the introduction

The business environment is currently confronted with several challenges. Although Slovak business has to face not only the competition subjects, but also complex legal mechanisms, it is expected to adapt to the European and global market. As to international trends, the ethical issues and the adoption of ethical policy standards in companies are increasingly being promoted. In this regard we should mention an important document entitled the Global Agreement that was adopted in 2000 and aimed at deepening socially responsible behavior [EUROEKONOM].

Business Ethics - International and National Context

UN Secretary-General Ban Ki-moon presents this agreement as a means "to ensure that companies comply with universal rules and co-operate with the United Nations" [UNITED NATIONS]. In our opinion, this initiative is quite successful. It also demonstrates the fact that more than 6000 companies and 120 countries have joined it. The Slovak Republic is also a member of the aforementioned initiative. Its Slovak network consists of the following founding members:

- Business Leaders Forum Slovakia
- Dexia banka Slovensko, Inc. (the current Prima Bank)
- Microsoft Slovakia, Ltd.
- ÖMV Slovakia, Ltd.
- University of Economics in Bratislava
- and others

All these companies are committed to obey the principles of this initiative (the Global Agreement). This means that they have adopted, promoted and integrated a set of core values related to human rights, labor standards, the environment and anti-corruption into their sphere of influence. So we face the question: how to implement these ambitions into the business environment?

The national strategy should represent a broad value consensus. It should be the subject of a longer-term line that should be directed to the fulfillment of key human values, to sustainable development and humanity, social stability and prosperity - simply to a better

life. Thus it appeals to various social actors to become part of an integrated effort. These actors should be highlighted and are expected publicly declare a prime interest in the self-assessment mode or present it in the form of adopted measures related to adhering to moral standards.

But this means that every social strategy and vision (at a societal, sectoral, organizational or group level) is more than just an agreement or a formal declaration of a certain interest. At the corporate level, it is linked to the basic purpose and direction of the business interest. But each business also has a moral responsibility towards owners, different stakeholders, shareholders, employees and society as a whole. Each of these categories affects the organization. Every shareholder involved in the company has his own opinion on what the company should do and how it should be implemented. For example, the owner - the shareholder legitimately expects return on investment. Investors may differ individually in the supposed "expenditures or profits", risk tolerance, and enthusiasm for social responsibility. Nevertheless, in relation to the strategy, there are still quite many ethical problems of different nature and intensity. For example, it is morally unacceptable if the seller does not inform the consumer about the actual content of his products, especially if they contain harmful ingredients. Ethically controversial is also the issue of selling different quality products in EU countries, or the prevention to export company profits outside the country in which they are created. If we have to talk about social responsibility, it is natural that companies should use profits to promote a higher quality of life and support social programs in the region. Therefore, morally controversial issues such as: Is it ethical to fund alcohol for high school celebrations if you know that its use on campus is forbidden? Is it ethical to advertise to tobacco companies?

In the context of current business ethics, it is a preferred such a principle that companies should be good citizens: they should be subject to similar rules and obligations - to pay taxes properly, to ensure waste collection, to maintain order and good working conditions as well as a healthy life. "I must say that moral persons are very important to good organizations, but also that good organizations help people become moral. It helps them in the sense that it allows to merge a decent life with a good life. "(Hartmann, 1996, p. 9) Companies are expected to support various communities, participate in public activities and collaborate with public institutions.

The practical implementation of moral responsibility assumes that a firm will comply with ethical behavior and meet certain ethical expectations. Therefore, owners or managers should think about their acting not only in economic or pragmatic terms, but they should try to find a rational, objectively equitable balance of interest between different interest groups.

Institutionalization of ethics in the Slovak business environment

We can say that business in Slovakia depends both on internal and external conditions. We believe that economic and social strategies, the specific nature of our business environment as well as implementation tools including inevitable ethical education play an important role for higher ethical business credit. It is also important for the business environment not to exhibit value-undesirable elements and to promote national cultural-value determinants more strongly. We also have to accept the fact that the business environment is increasingly internationalized and globalization is characterized by an increase of foreign investors and companies, their models and value impacts. Despite the fact that business ethics is relatively widespread and implemented in Slovakia in various areas of social life (education, alliances, non-profit sector) it does not achieve the required efficiency. A critical point of ethical caution is insufficient perception of ethical aspects related to strategies and visions, the importance of international ethics in business, as well as of the impact of business ethics in general or in its individual segments (management ethics, ISO quality, corporate social responsibility, organizational culture and negotiation cultures, marketing, etc.). The cause may be seen also in the application of educational methods following the old paradigm. Eliminating these causes or setting up mechanisms to support ethical policy can increase interest in it and promote the integration of ethics into business. Finally, ethical policy confirms that the company is a good member of the community². From this point of view, we should prefer applying the most recent methods and methodologies based on the post-foundational paradigm. The starting points for our subsequent reflections on the ethical business revitalization in Slovakia are also the significant facts about the Slovak business environment as well as the specifics in the education in business ethics. Our task is to implement an ethical approach to business at different levels – nation-wide or even global, organizational or corporate and individual. As we have already addressed the issue of global business ethics and global strategies, in this section we will deal with the organizational (corporate) level.

Specifics of Business Environment in Slovakia

Our business environment has a specific structure that requires appropriate education strategies and implementation practices. The current structure of Slovak business entities in comparison with average in EU is as follows:

² As stated by A. Klimková, for organizations, businesses, businesses, the key question is „what are the norms, values and standards that we should establish, accept, institutionalize not only for employees of the enterprise but also as reasonable expectations for all stakeholders”? Klimková, 2016, p. 88).

	Number of firms			Number of employees		
	Slovakia		EU-28	Slovakia		EU-28
	Number	Quotient	Quotient	Number	Quotient	Quotient
Micro-enterprises	377 379	96,4 %	92,7 %	552 381	39,0 %	29,2 %
Small enterprises	11 474	2,9 %	6,1 %	224 291	15,8 %	20,4 %
Medium - sized enterprises	2083	0,5 %	1,0 %	224 789	15,9 %	17,3 %
Small, medium – sized enterprises	390 936	99,9 %	99,8 %	1 001 470	70,7 %	66,9 %
Large enterprises	469	0,1 %	0,2 %	415 365	29,3 %	33,1 %
Total	391 405	100,0%	100,0%	1 416 835	100, 0 %	100,0 %

Source: SBA, factsheet 2015: www.mytvorimehospodarstvo.sk/stav-malych-a-strednych-podnikov-na-slovensku/ (edited version)

These estimates for the year 2008 were compiled by DIW Econ and based on data for 2008 - 2012 from the Structural Business Statistics Database (Eurostat). These data are related to "non-financial sector" including industry, construction, trade and services, but they neither include agriculture and fisheries, nor enterprises in predominantly non-market services, such as education and health. Attention is drawn to the fact that 99.9% are small and medium-sized enterprises in Slovakia and only 0.1% are large companies. The average of European countries exceeds Slovakia, especially in the area of micro-enterprises, where almost 40% of citizens are employed. Despite the low share of large enterprises, this segment employs almost 30% of people. As to the impact of corporate culture and ethics on employees, this sector affects approximately 1/3 of all employees. This fact suggests that despite the low share of the corporate market, the impact of large enterprises is also quite substantial and important in Slovakia. In principle, the tradition of business ethics has long been formed only towards large companies, influential firms that play an important role in the labor market, also in terms of economic strength or prestige. Entrepreneurial ethics in small and medium-sized firms has no tradition in the west, even though it is also becoming a subject of interest. Ethics has been favored in this area through national or regional associations, unions, incubators or on an individual level. The creation of ethical programs in these organizations (micro- and small enterprises) has had no tradition or real forms yet. The formation of ethical platforms is suitable and conceptually designed especially for large companies or medium-sized companies. These disproportions form a basis for strategic intentions in education, ethical counseling, or ethics-based partnerships. It is necessary to create unconventional formats of ethical influence, ethics implementation and involve them in the process of ethical revitalization³. From this point of view, national politics should be projected into local forms of ethical work, specialization

³ Under ethical revitalization we will be in agreement with prof. Fobel to understand activities aimed at the ethical change and recovery of the moral climate in organizations as well as in society as a whole

of entrepreneurs working in small firms and regional business spheres, for example, also into the form of trustworthy formats at the level of a higher territorial units, regional chambers, or municipality. In addition, ethical counseling (such as regional counseling centers, special counseling services by specific regions, etc.), educational models and support (valuation) will also need to be adapted in cooperation with committees dedicated to entrepreneurship⁴.

Otherwise, individual interests, unfair practices or their non-profit - activities without their evaluation will be promoted in creating unprofessional methodologies or interests. An important basis for advice and implementation projects focused on ethical support is also the acceptance of the specifics and specificities related to the micro-enterprise profile of small and medium-sized enterprises. Micro-enterprises (with between 0 and 9 employees) play an important role in the "non-financial corporate sector". They represent a specific social environment and a distinct climate that make relatively easy to find out relationships and identify conflicts, influence the situation in this environment, train managers, and set up ways of support. Strategically significant is to overcome individual opportunism, promote regional sympathy, support competition in this difficult environment, to convince leaders about the importance of ethics in entrepreneurial endeavor. Suggestions for projects and schemes for such activities will often depend on individual coaching, personal courage of the owners or low financial dispositions in this area. However, we need to realize the scope of this category because it represents a working environment for almost 40% of all jobs. Climate improvement will affect not only the working confidence in such an enterprise but also support the corporate reputation in the region as well as a competitive advantage and stability. In these enterprises, like in small and medium-sized ones, corrupt behavior has specific expressions and prevention has to take the different form than in a large enterprise. Support for small and medium-sized enterprises should be aligned with the EU's policy on the SBA, the Europe 2020 strategy and the 2020 Entrepreneurship Action Plan. According to the EU, Slovakia has introduced several instruments to prevent corruption, but we miss the political will and the ability to enforce these rules. Therefore, we welcome our government's activity - to establish an anti-corruption government office and implement 'ISO quality 37,000' within the business environment and public institutions. Also the initiative to train specialists with anti-corruption skills and offer governmental scholarship is a manifestation of an active approach to tackle corruption in Slovakia. Accepting this situation itself, endeavoring to support ethical approaches, advice and project creation is for us – ethicists, very important. From our point of view, we can understand these enterprises beyond both the micro-firm and the implementation of some basic tools of ethical development. It can be an ethical statement (regarding corrupt practices), an ethical vision, or a simple code of

⁴ An example can be a nonprofit organization, the Center for Research of Client Opinions (CVNZ), which grants, under its own uncertified license, certificates "Trustworthy Company" in Slovakia for a financial payment. In many cases, they are companies with dubious public reputation. (www.aktuality.sk)

ethics with the ways of accepting and dismissing employees, fair behavior towards other firms and institutions, customers, the environment, ways of possible social support or manifestations of humanity. Such companies can form their own organizational culture, image and reputation, values and tradition, alliances (with educational institutions) and partnerships, models of responsible behavior, present moral patterns and symbols. It is important for leaders to be credited here as moral personalities, leadership in its modern style and patterns of behavior. This task is a great challenge for ethics, which allows us to succeed in a competitive environment and deal with models of similar companies abroad. In terms of regional support and cooperation, it is essential to link to public institutions and regional marketing, to evaluate and present companies, to obtain economic as well as public benefits or support in possible economic collisions. This ethical role requires actors with a conceptual moral effort, the use of an arsenal of business ethics, experience with foreign affairs, and the creation of value-based perspectives.

Large companies in Slovakia also have some specifics. To illustrate the specificities of ethical help, whether through counseling or proposals for solutions, we did a survey that focused on the minimum requirements of ethical business policy. For the representative selection of large enterprises in Slovakia, we have chosen the following criteria in terms of ethical requirements:

- Foreign companies in Slovakia;
- Economic success in Slovakia;
- Economic success in Slovakia in individual sectors and national priorities;
- Meeting the ethical parameters in terms of the ethical program elements (at least three ethical elements - tools);

BUSINESS ETHICS AND SUSTAINABLE DEVELOPMENT

Our analytical conclusion on the assessment of the ethical infrastructure in leading companies in Slovakia is as follows:

SLOVAK FIRMS FOREIGN	SECTOR	DEFINED GOALS, VALUES, VISIONS	INTERNAL DOCUMENTS, ETHICAL CODES	TRAINING OF EMPLOYEES	INTERACTION WITH COMPANY	ENVIRONMENTAL PROTECTION	HOTLINE, COMPLAINT SOLVING	PARTNER ZONE, STAKEHOLDERS ISO 9001	ANNUAL REPORTS ISO 14000	ISO STANDARDS					
										ISO 14001	ISO 50000	ISO 50001	ISO 18001		
1.	U.S. Steel Košice, Ltd., Košice	Metal production and metallurgy	A	A	A	A	A	A	A	A	N	A	N	A	N
2.	Volkswagen Slovakia, Plc., Bratislava	Automobile industry	A	N	A	A	A	N	A	A	N	A	A	A	N
3.	Slovnaft, Plc., Bratislava	Chemistry and plastics	A	A	A	A	A	A	A	A	A	N	N	N	A
4.	Slovak gas industry, Plc, Bratislava	Gas industry	A	A	A	A	A	A	A	A	N	A	N	N	N
5.	Samsung Electronics Slovakia, Ltd., Galanta	Electrical engineering	A	A	A	A	A	A	N	A	N	A	N	A	A
6.	Kia Motors Slovakia, Ltd., Žilina	Automobile industry	A	N	A	A	A	N	A	A	N	A	N	N	N
7.	PCA Peugeot Citroën Slovakia, Ltd.	Automobile industry	A	A	A	A	A	A	A	A	N	A	N	N	N
8.	Sony Slovakia	Electrical engineering	A	N	N	A	A	N	A	N	A	N	N	N	N

Source: own proposal

Explanation:

red field - there are very few monitored indicators on the web site

green field - all monitored indicators are posted on the web site

A - this indicator is located on the web site

N - there is no given indicator on the web site

The quality of ethical counseling and the effectiveness of ethical policy have not been examining yet. We wanted to demonstrate the basic idea of the ethical environment and the implementation of ethical standards in accordance with our environment (in Slovakia). In this area, we could also play an important role in the counseling centers, respectively, BB CAE (Advisory Center), which I personally represent. Our nonprofit organization focuses on methodological assistance – advice for those who express an interest in increasing the organizational culture (e.g. Higher Territorial Unit, Municipal Office, small and medium-sized companies in the region, First Building Company, Banská Bystrica, Police Body). At the same time, we are interested in regional presentation of those companies that demonstrate good practice and have a high level of credibility.

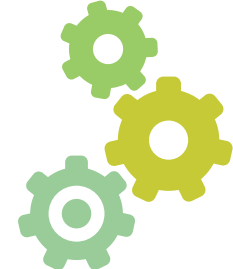
Ethical policies are implemented without deeper public response and support. Companies in Slovakia respond to these challenges differently, they use professional services in the given area very rarely. Even though, the advanced economic world already requires ethics in business, we still do not feel that sufficiently enough or, in other words, we underestimate it as a preventive tool that serves to minimize potential failures and build high trust. Probably, it is the result of the incomplete market development, respectively, its ethical level. Anticorruption behavior is rather declarative. There is no solution to the question of ethical prevention and there is a clear absence of ethical policy in the top state authorities themselves. It is important to note the moment and recommendations of applied business ethics that until there is the mechanism for ethical protection (ethical commissions) and for reporting (ethical audit), the ethics system will not work completely. According to our experience, we can find out, that our companies often underestimate it. Basically, this mechanism is not just a matter of implementing ISO standards or codes of ethics. Of course, they must be included, but it is necessary to form an own cultural-value and instrumental framework for enforcing ethical requirements in business.

Conclusion

In this respect, it is important to establish a nationwide organization as well as regional branches taking care of the implementation of ethics, ethical advice and supporting the ways of highlighting those companies that actually reinforce a certain form of ethical regime. This process also includes the adoption of ethical advice as official professional competence, adoption of the ethics audit act and mechanisms of ethical behavioral guarantee.

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Andrea KLIMKOVÁ¹

Ethical Issues Industry 4.0 and Strategic Alliance for Ethics

Abstract

The main objective of the contribution is to theoretically explain and justified the role of applied ethics for vision of Industry 4.0. as economic policy strategies and concept of future. Why do we need transdisciplinary scientific teams and strategic alliances for ethics? What role they will play in the communication interactions between people, machines and people, and between machines themselves. The literature preview provide evidence of the role that strategic alliances for ethics should play as networks in promoting technological and digital innovation for policy-makers, individual and organisational moral actors.

Keywords: applied ethics, Industry 4.0, strategic aliances for ethics; expert for ethics

Etické otázky industry 4.0 a strategické alianice pre etiku

Streszczenie

Hlavným cieľom príspevku je teoreticky vysvetliť a zdôvodniť úlohu aplikovanej etiky pre víziu Industry 4.0. ako stratégie hospodárskej politiky a koncepcie budúcnosti. Prečo potrebujeme transdisciplinárne vedecké tímy a strategické alianice pre etiku? Akú úlohu budú zohrávať v komunikačných vzťahoch medzi ľuďmi, strojmi a ľuďmi a medzi samotnými strojmi. Prehľad literatúry poskytuje dôkaz o úlohe, ktorú by strategické alianice pre etiku mali zohrávať ako siete pri podpore technologických a digitálnych inovácií pre tvorcov politik, individuálnych aj organizačných morálnych aktérov.

Słowa kluczowe: aplikovaná etika, Priemysel 4.0, strategické alianice pre etiku, experti na etiku

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1. Subject matter and the research question

The main aim of this article is to present theory which justifies and advocates the involvement of applied ethics in the discourse as well as specific implementation practice known as Industry 4.0. Economic, technological and social policies based on the vision of the fourth industrial revolution in the forms of technological transformation and high-tech strategy application are taking place in all areas of the society and global practice. Paradoxically, although technological success and innovation help solve partial issues related to the ecological crisis (e. g. waste recovery), at the same time, they continue to threaten the eco- and biospheres. Risk generation and accumulation as well as the failure to deal with the uncontrolled consequences transfer conflicts into the social, decision-making, ethic, axiological and other areas related to human rights, social and environmental justice. The unlimited effectiveness of the interconnection between science and technology results in innovations in the policy management. Industry 4.0 and technological thinking integrate not only new technology, work organisation and management, but also new institutional procedures and institutions themselves. Innovation cycles in different areas of industry have brought upon the Internet of Things (IoT); the principle which will guide the digital world can be formulated as follows: technological transformation cannot be implemented without an ethical purpose and instruments.

There are important reasons why transdisciplinary research teams and strategic alliances in ethics are needed – they will play a role in the digital world, knowledge management as well as the communication between humans, humans and machines, and machines. Various social practices in which technology and technological concepts, projects and programmes are implemented provide data (descriptive level of ethical evaluation) on the fact that conflicts of values generate problems and negatively affect specific areas. The findings provide arguments about the role of strategic alliances in ethics as implementation networks for ethical management, sustainability promotion, ethical performance and social innovations in different social areas. It clearly indicates that policy makers must require ethical performance and ethical management from institutions, organisations and corporations; there is empirical evidence that networking, strategic alliances for ethics and support are meaningful and advantageous. Strategic alliances with experts in ethics may help and provide efficient ethical screening and ethical project management, technology assessment and introduction of social innovations.

Technology assessment (TA) represents a response to the technical advancement; it is an examination process focusing on the social consequences of the significant new change in technology, also perceived as the relationship between technological changes and social issues with a powerful political dimension. Today, ethics of technology as a field of applied ethics as well as technology assessment face the Industry 4.0 challenge. For the scholars

in applied ethics as experts, becoming a part of the strategic communities represents a challenge – however, it is necessary to evaluate concepts, projects and programmes and help eliminate ethical, social and environmental risks. According to Ľ. Vladyková (2013), TA formulates alternative policies in order to promote desired consequences and mitigate the negative ones. Gradually, social technology assessment develops a multicriterial nature; it struggles to overcome traditionalism in TA which prioritises technical-economic criteria, utilitarian pragmatism and values resulting from technological and instrumental rationality (Vladyková, 2013, p. 207).

So far, few articles addressed the ethical questions or ethical assessment related to the Industry 4.0 concepts. In Central Europe, mainly Germany² and among the V4 countries, Poland did so (Kuzior, 2017; Kiepas 2017). Their growing interest is materialising into initiatives such as panels, scientific conferences, projects; building of interdisciplinary teams can be observed. The strategic alliance for ethics can be initially defined as an alliance or epistemic community in which independent organisations are involved in one or more key strategic areas such as technology, Internet of Things, sustainable development, Smart Cities concepts or technology implementation assessment in a range of social areas (economy, health care, environment) and organisations. The other problem which calls for ethical service and the help of applied ethics is the process of globalization. According by Svitačová – Pechočiak (2017), this process goes hand in hand with the technological development and substantially changes the university education. The current demands on the graduates of the economic faculties and universities are connected with the development of the global market and a new global economic and social environment. The growing global market provides the possibilities for putting forward economic interests in a whole world rate, for increasing the economic growth or business development as well as for meeting the human needs. At the same time, the technological progress, reaching the economic growth and a growing well being of people are in the shadow of the risk production (Svitačová – Pechočiak, 2017).

2. Industry 4.0 – the fourth industrial revolution and its main pillars

The concept of Industry 4.0 has gained great importance in recent years. The increase in usage of computerized systems after the 3rd Revolution, Industry 4.0 deals with creating more digitized systems and network integration via smart systems.

The vision of Industry 4.0 is described through nine concepts, previously defined by Boston Consulting Group (Rüßmann et al, 2015). Rüßmann et al. (2015) shapes the vision of Industry 4.0 on defining nine aspects related to the concept; these are big data, autonomous robots, simulation, horizontal and vertical integration, Internet of Things, the

² Highly qualified experts were available in Germany as early as in the 19th century – it was one of the most technologically advanced countries which paid considerable attention to the social technology assessment. It is closely related to the concepts of responsibility.

cloud, additive manufacturing, augmented reality, and cyber security. These aspects are analysed in Applied ethics on descriptive level of ethics, especially in specific subdiscipline of Applied ethics, for example in ethics of technology, social ethics, ethics of information, etc.

According to Gizem Erboz (2017), big data concept takes the important role on Fourth Industrial Revolution. The framework of Big Data could be described as data as a tool (solve traditional value chain problems by existing capabilities), data as an industry (new ventures and develop software systems for handling big data) and data as a strategy (building data resources by developing new innovative business models). The usage of more industrial robots in factories accelerates with Industry 4.0. Robots could be used in several areas such as production, logistic, distribution activities could be controlled remotely by humans thanks to the human robot cooperation. Vertical integration refers to the flexible and reconfigurable systems inside the factory and the extent to which they are fully integrated with each other achieving agility: horizontal integration deals with the integration of partners (Erboz, 2017). And other aspects are also fundamental and important and they need ethical analyses. For examples, cyber security is another important ethical issue, which could have "a destructive impact on business environment due to the harmful intents of terror attacks" (Erboz, 2017, p. 765).

These are just a few reasons why we need ethical analysis and technology assessment before and during the implementation of Industry 4.0 concept and strategies in different spheres.

3. Technology assessment (TA) and alternative technology (AT)

Until recently, technology assessment and ethics of technology developed separately; however, the recent trend indicates convergence towards a prospective synthesis in applied ethics. The elementary limits of the current technological actions in the world technological practice have been set by the social technology assessment (TA) as well as the environmental impact assessment (EIA). The main tasks of the international environmental policy regarding sustainable development include assessing the side effects of technology and classifying them (economic, political, ecological, legal, moral, ethical)³. In the technocratic eudaimonism of the 20th century described by D. Bell, science brought order into the chaos (1976)⁴, however, in the 21st century it has been reformulated into new normative instruments, albeit of exclusively technological nature. As an example,

³ Based on the current environmental standards and instruments, the environmental impact should include secondary, cumulative, synergic, short-term, mid-term and long-term, permanent or temporary, positive as well as negative consequences.

⁴ Theoretical reflections on the positions in the philosophy of technology cover a range of approaches (F. Rapp, G. Ropohl, U. Beck, L. Tondl, A. Kiepas In: Stekauerová, 1999; Fobelová, 2005; Vladyková, 2013). Today, technology assessment and ethics of technology synergise into the current ethics of technology as one of the applied ethics subdisciplines.

the Protocol on strategic environmental assessment has been institutionalised in practice with the aim to provide a high-level environmental protection including public health by e. g. policy-making support, legislation, setting out clear and transparent procedures for strategic environmental assessment and sustainability integration.

Technology assessment is a scientific, interactive, and communicative process that aims to contribute to the formation of public and political opinion on societal aspects of science and technology. TA was first institutionalized in 1972 and basically centers around four groups of questions: regarding technology, involved actors, social impacts and policy options to address those impact. „Classical TA is a form of expert-based policy analysis to identify and evaluate in an early stage the potential secondary consequences of technology“ (van Erst – Brom, 2012, p. 306). We can see various ways in which TA institutionalised. Currently, there are TA programs in universities, research institutions, industry, and so forth. For example, in the context of applied ethics and democratic practice, TA is categorised according to: tasks and functions (e.g. policy support and technology forecasting), methods (e.g. participatory TA, constructive TA, health TA); field of action (energy, nanotechnology); target groups (policy-making, community, industry). Constructive technology assessment is a mode of TA that wants to address social issues around technology by influencing design practice. According by van Est and Brom, parliamentary TA is an aim to strength representative democracy by timely informing hen about potential social impacts of technological changes. Participatory TA is a mode of TA that aims to enrich the political and public debate around the social aspects of science and technology by organising the involvement of experts, stakeholders, and citizens to identify and evaluate the societal impact of technological change (van Erst – Brom, 2012, pp. 306–307). Alternative technology (AT) as a project also enters the dialogue in response to the insufficient axiological, ethical and praxeological TA base. The AT project not only adopts technology assessment, but also targets ecology, pro-nature strategies and barriers for the use of technology. AT also requires supervision with the implicitly present principle of carefulness. L. Tondl interprets social technology assessment as a combination of TA and AT in which AT takes into accounts risk assessment and environmental impact assessment. According to the currently valid Slovak legislation addressing science and research, the whole field of technical sciences⁵ is purpose- and operation-oriented, constructive; it integrates projects from different scientific fields (as defined by OECD). It applies to technical sciences which “research technology, analyse technological systems, systematise and synthesise or provide ideas and anticipate new technological objects, processes or technologies” (The Ministry of Education, Science, Research and Sport of the SR, 2014). Technical sciences and related engineering practice provide an axiological field and generate moral problems and dilemmas since they significantly affect people, environment, culture and society on all its levels (systemic, organisational, and individual).

⁵ Technical sciences are the second of the six fields of science and technology as defined by OECD. In the same form they have been incorporated into the valid Slovak legislation.

A. Kiepas suggests that during the Industry 4.0 period we are experiencing a normative return and technology assessment transformation. He also states that multiple factors determine TA changes. The most important of them include: changes in technology, related adverse effects and their extent; the way scientific technology emerges and spreads – often globally; understanding of technology and its place in the world as well as its relationship towards the nature, humans, culture and society. Based on the TA and ethics of technology synergic theoretical concept, A. Kiepas states (2017) that in normative approach, the assessment of activities, methods, groups and consequences take place on two levels: (1) effects in a specific area which also require area-specific criteria (e. g. ecology, health care, SMART CITIES, security, quality of life, etc.); (2) at the overall level (global criteria and measures). Kiepas (2017) points out that issues related to the very nature of values as well as the necessity to combine them emerge at this level.

Ethics of technology as an applied ethics subdiscipline as well as ethics of engineering as a type of occupational ethics continue to face low discourse quality as defined by E. Stoker in one of the first anthologies on philosophy of technology ten years ago. Elizabeth Stoker coined the term “paradox of constant beginning”. Today, a large number of ethical studies is available and all of them could be characterised as pure (common) introductions to the discipline. Stoker sees the solution to this problem in the adoption of a rigorous interdisciplinary conceptual framework and cooperating among philosophers (experts in applied ethics – added by A. K.) who study technology and real scientists who are involved in research, development and production of new technologies.

4. Strategic alliances for ethics

Science may or may not be able to quantify the risk, but even if we have risk estimates, discerning how much risk we should take, if any, is not something science alone can answer. Ultimately it is a moral assessment we need to make collectively. The prognostic visions and current surveys indicate that in all areas of social practice applied ethics plays a crucial role; it is involved in dialogues and projects in practice. Ethical standards are adopted, ethical commissions established as well as interdisciplinary and transdisciplinary teams. Today, applied ethics is a recognized area of ethics and inter/transdisciplinary efforts of contemporary sciences. As a part of ethics, it participates in the common project of ethical environment promotion in the society and protection of human values. The priority mission of applied ethics is to respond to current problems, eliminate moral risk resulting from new technologies as well as implement the ethical intention and requirements into practice. Our key interest is to develop professional and moral competencies in those who can respond to the current issues and social challenges, and implement the ethical intention in practice. According to P. Fobel, a theoretician in applied ethics, “this interest corresponds with the ethical effort to create a good (better) life and support strategic intentions of the sustainable life” (Fobel, 2017. p. 5).

For experts in applied ethics, it is very important to justify why individual norms, standards, principles or values in moral practice must be binding. The way methodology and instruments in applied ethics are created must help ethical decision-making in which the situation and circumstances of the given moral participant (individual or collective) are taken into account. Especially, this applies to interdisciplinary teams and scientific communities which often involve international or national participation and transdisciplinary cooperation. As it was already indicated, the barrier is often represented by the fact that in the implementation of policies, programmes and projects, many values do not automatically lead towards the optimisation of other values (Kiepas, 2017), although the dependency between them is obvious (e. g. economic prosperity of an agricultural company is interconnected with its environmental impact such as soil chemicalisation, use of heavy machinery, or welfare of farm animals) which can put these values into a conflict. Today, this moral pluralism is a matter of course. However, it represents a significant challenge in decision-making and provision of ethical recommendations. The moral value pluralism is based on the idea that not all values and value systems are equally true, important or acceptable. Value pluralism does not depend upon any meta-ethical opinion. It normatively determines the values. To incorporate all beliefs into the assessment and subsequent solution, specific procedures and transdisciplinary projects are needed along with the creation of epistemic communities and scientific teams.

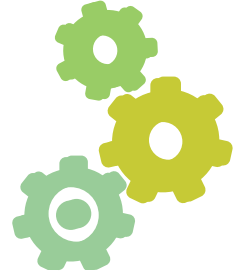
In Slovakia, we understand Industry 4.0, technology assessment and sustainability issues as interconnected vessels. The expert work of ethics on sustainability issues in the context of applied ethics is addressed by several theoreticians from different disciplines. Specifically, within the framework of applied ethics, they examine sustainable development (Aleksandra Kuzior, 2014; Eva Svitačová 2017; Andrea Klimková 2015, 2017). They seek to justify the participation of applied ethics in strategic alliances for ethics. Industry 4.0 time requires this great and challenging task.

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Daniela KOVÁČOVÁ¹

The crisis of humanities and its consequences in the concept of nostalgic society in the context of sustainable development

Abstract

At present times, we are witnessing a radical under-estimation of the humanities . Education itself faces strong criticism and the challenges for transformation. Systematically, the importance of humanities, their contribution, the societal need, or the methodological and other self-sufficiency is being relativized in favour of the technical and economic sciences. At the same time, we see how Europe, but not only Europe, finds itself in situations we have considered reversed a long time ago. Again, we are witnessing an increase in anti-Semitism, nationalism, we hear voices calling for the mob rule, the crowds are moved by the hatred and fear of the different, but also of what is known, and so on. According to several authors (Nussbaum), the crisis of democracy is the result of the crisis of the humanities. The role of humanities is not primarily the creation of profits, and it cannot be by their own principle, the universities are not, and historically cannot be, the business entities. Humanities are the key pillars of democracy, and their irreplaceable role is also in supporting and developing sustainable development concepts. The mapping of the importance and benefits of humanities in the context of the present times will be addressed in our presentation.

Keywords: humanities, education, democracy

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Kryzys humanistyki i jego konsekwencje w koncepcji nostalgicznego społeczeństwa w kontekście zrównoważonego rozwoju

Streszczenie

W chwili obecnej jesteśmy świadkami radykalnego niedocenywania nauk humanistycznych. Sama edukacja stoi w obliczu ostrej krytyki i wyzwań związanych z transformacją. Systematycznie relatywizuje się znaczenie nauk humanistycznych, ich wkładu, potrzeby społecznej, metodologicznej i innej samowystarczalności na rzecz nauk technicznych i ekonomicznych. Jednocześnie widzimy, że Europa, ale nie tylko Europa, znajduje się w sytuacjach, które już dawno uznaliśmy za odwrócone. Znowu jesteśmy świadkami wzrostu antysemityzmu, nacjonalizmu, słyszymy głosy wzywające do panowania tłumu, tłumy kierują się nienawiścią i lękiem przed innym, ale także przed tym, co jest znane itd. Według kilku autorów (Nussbaum) kryzys demokracji jest wynikiem kryzysu humanistycznego. Rola humanistyki nie polega przede wszystkim na tworzeniu zysków i nie może być z samej swojej zasady, uniwersytety nie są, a historycznie nie mogą być, podmiotami gospodarczymi. Nauki humanistyczne są kluczowymi filarami demokracji, a ich niezastąpioną rolą jest także wspieranie i rozwijanie koncepcji zrównoważonego rozwoju. W naszej prezentacji poruszone zostaną kwestie dotyczące mapowania znaczenia i korzyści nauk humanistycznych w kontekście współczesności.

Słowa kluczowe: humanistyka, edukacja, demokracja

Humanities. Humanities education. Nostalgic society. Sustainable development. Democracy.

The aim of this article is a brief reflection on the role and position of humanities in a wider social context. The persistent and flat rejection of the claim, that current events are a period of all-society changes that will fundamentally affect the character of the society in which probably already our, and at the latest next, generation will live, would be inadequate in the current context.

We watch from the first row how the building blocks of society are being shaken in their foundations, though each one of them with different intensity. Increasingly younger people are actively engaged in social action and want to become equal partners in social dialogue. Sometimes it seems that the European public, and I mean especially the Central European public, just woke up from a long sleep, full of lethargy, and now it stands up fully awake with its legs still being limb, and, the same way as once the legendary Nietzsche's Übermensch did, it grasps a fictitious hammer, and with a hand still numb, it tests the force of longaeval rights and values. I am not audacious enough to try to forecast the result of

this shaking. But what I consider to be of the utmost importance is to pay the greatest attention to the humanities and humanities education, their knowledge and meaning. It is exactly them and their knowledge that could be our steering-wheel in turbulent times.

In the context of his publication, named *Retrotopia*² from 2017, Z. Bauman introduces into wider awareness the work of Svetlana Boym³, a professor of Slavic and comparative literature at Harvard University. It is precisely Boym's reflection of the present times that inspires both Bauman and us. According to Boym's, the present times are overwhelmed by the epidemic of nostalgia. This epidemic of nostalgia as "the emotional desire for a community with collective memory, the desire for continuity in a fragmented world ..." [Boym in Bauman, 2017, p. 8] becomes more and more pronounced.⁴ Nostalgia appears to some extent as a defensive mechanism of the present actors "in the time of the accelerated rhythms of life." [Boym in Bauman, 2017, p. 8] But it is not for free and it is also not without pain. It is tempting as a promise "to rebuild an ideal home, which is at the heart of many influential ideologies of today, challenging us to give up critical thinking for emotional attachment." [Boym in Bauman, 2017, p. 8-9]⁵

Nostalgia is not a grip on the image of the past, but it is an idealizing deforming view, whereby the viewer resigns to the future: "The danger of nostalgia is that it tends to confuse a real home with the Imaginary one." [Boym in Bauman, 2017, p. 9] And so nostalgia becomes one of the driving forces of "national and nationalist revivals all over the world that engage in the myth-creation of the history by returning to national symbols and myths, and occasionally exchanging conspiracy theories." [Boym in Bauman, 2017, p. 9] Every day we are witnesses to how humanity has repeatedly not learned from the horrors of the past. Younger generations do not understand the meaning of freedom, and they voluntarily give it up blinded by ubiquitous consumption. Everything is quantifiable, everything has its price and we are not equal in such a reality. We are what and how much we can afford. Economisation to such a degree, destroys human dignity and nourishes new fears stemming from the possibility of losing one's income.

Universities have contributed, long-term and vitally, to the development of society and the economy and create the necessary foundation for sustainable growth. They are undoubtedly (co)forming actor of the cultural and social development of Europe. As an independent committed institution, the University is a key "player" in defending the democratic principles of our society, including through the critical reflection of moral majority with its moral judgments. The environment of humanities, we believe, the environment of giving "birth" to intellectuals, and the crisis of today's society is at the

² Zygmunt Bauman, *Retrotopia*, Artforum 2017.

³ Svetlana Boym, *The Future of Nostalgia*, Basic Books 2001- in this book, Boym describes nostalgia as a feeling of loss or relocation, but also as a love romance with its own fantasy (p. 13).

⁴ Not only in the analysis of the Central European societies.

⁵ Nostalgia is thus linked to the period post-factual, typical by the absence of critical thinking and falling into the enthusiastic overwhelming conspiracy theories. Nostalgia - truth and mostly idealizing the emotional survival of reality – it is the present-time...

same time the lack of significant intellectual forces moving society forward in a democratic direction and is also a symptom of the crisis of humanities. [Kováčová Koval'ová...]. As O'Brien writes:

"Humanities and art play a central role in the history of democracy, yet many parents are nowadays ashamed of their children studying literature or art. Literature and philosophy have changed the world, but parents around the world are rather alarmed by the fear that their children will not gain the necessary financial skills, than the possibility of not having sufficient training in the humanities." [O'Brien in Nussbaum, 2017, p. 17]

Humanities are often, not only by governmental top representatives, but also by the general public, considered as ineffective, they are a whimsical and un-cashable consequence of once celebrated, *cogito ergo sum*. We adore natural and technical sciences, potentially producing patents, whose strength lies in the ability to monetize. Economic gain as a criterion of quality - as absurd as it sounds, especially in the context of humanities - and yet it is true. Nussbaum in her book very cautiously warns of what is not happening here but what we are witnessing on a global scale. She talks about so-called *silent crisis*⁶ of humanities, which are supported in a severely limited form, as individual states are focused on generating national profits [Nussbaum 2017]. As a result of this underdevelopment of the humanities, the characteristics and values that are crucial to democracy are slowly disappearing from our social space⁷. With words by O'Brien:

"Nussbaum shows that we should think like Rousseau, who knew that his Emil must learn to put himself into living in ordinary human tribulation. He has to see the world through the prism of vulnerability of a different kind; he has to freely develop his imagination. Only then, he will see people as real and mutually equal. Only then he can be equal among the equals and understand the interdependence of people as required by democracy and

⁶ "We are in the midst of a crisis that is enormous in size and has a serious global importance. No, I do not mean the global economic crisis that broke out in 2008. At least everybody knew that the crisis was close, and many world leaders were busy working hard to find a solution ... No, I mean the one going unnoticed, like cancer; a crisis that is likely to be far more damaging in the long run for the future of democratic sovereignty; I mean the global crisis in pedagogy and education." (Nussbaum, 2017, p. 29)

⁷ In this respect, V. Belohradsky's approach is also interesting, which, in intellectual considerations, is based on the term "writer's engagement" as developed by Heinrich Böll, in the sense that the writer has to engage in what the moral majority in their moral judgments conceals. Or, as Arendt writes, and to which Belohradsky also refers to, the intellectual should be open to experience, from which the perspective the others exploit their truthfulness, legitimacy. Belohradsky sums it up in the term of "democratic imagination" - "to experience the experiences of others as our own". The historical condition of democratic imagination is equality between people and its source is art as what imparts others pain as "our own". The role of the intellectual is then, according to Belohradsky, to defend the democratic imagination against the majority morality and its catechisms. The moral judgement is also the judgement of the winners over the defeated ones, so it conceals the similarity between the winners and the defeated (e.g. the Nuremberg process). Catechisms of majority morality are confirmatory scenarios of self-optimization (life-style). The role of the intellectual is thus to point out the concealed and reveal the hidden. Belohradsky refers to the work of Claus Offe, according to which: "modern society is the current growth of steam and ice". Under the ice, we understand highways, supermarkets, bureaucracy or generally structures that restrict freedom of choice. The steam, on the contrary, is the rights. And as we have already mentioned, each increment of steam is redeemed by the increase in ice. The role of the intellectual is, according to Belohradsky, to talk about ice, which is often forgotten by a person of steam, in other words, the role of the intellectual is the protection of democracy (Kováčová Koval'ová 2017).

world citizenship." [O'Brien in Nussbaum, 2017, p. 19]

We believe that the nostalgic society suffers from the mentioned silent crisis of humanities. Even from it, like from the mycelium, the ailments and fears of today arise. Education is not a primary tool for making profits, and to consider it as such is devastating. In order to parameterize education, to determine the key competences and skills of an educated actor, that is to say an actor - robot - well employable in the labour market and so on, the education is getting lost. As Liessmann writes:

"What is claimed today under the title of education, what is promoted by the journalists of education, what is said by the politicians of education, what people are striving for in schools and universities is the opposite and a caricature of education, a phrase, a chimera, one single huge word bubble, a ghost that does not make his mischief at midnight, but at the best time of teaching: in the hour of spirits! The contours of this ghost sometimes remind the idea of education, the claims and promises associated with it could not sound better, and yet it hides - nothingness. No knowledge, no attitude, no culture, no happiness." [Liessmann, 2015, p. 11]

Liessmann is a well-known critic of current trends in education. What is interesting to us, in the context of this text, is an outlook that he formulates in his polemical work *Witching Hour, Practise of Illiteracy*: He notices that a person as an absolver of the present educational system is a *Schiller's slave spirit*: "How could we call someone a happy person who must test by exploitability everything that might interest him, who can still hear how much he has to dispose of as an educational ballast to be constantly armed for the new, who daily feels that the development and evolvment of his abilities and capabilities will serve only the objectives of economic rentability, and who will then always experience this as being determined by something else?"⁸ (Liessmann, 2015, p. 10). The current education setting not only does not have the ambition to fulfil the humanity in our country but, as a result, it does not support the pro-democratic setting of the society with which the humanities are closely intertwined and based largely on the fact that not everything has its price, but everything has its value.

The importance of humanities is systematically relativized, as evidenced not only by their under-funding by competent authorities and grant agencies but also by their reduction in the curriculum of primary or secondary schools or at universities in general [Nussbaum 2017]⁹, or by the constantly decreasing number of candidates to study it, not only as a result of the demographic curve. The economisation in all social subsystems results in

⁸ Or as Nussbaum writes: "There are radical changes in what democratic societies teach young people, and these changes have not been properly thought out. If this trend continues, the peoples around the world will soon produce more generations of useful machines rather than universally developed citizens able to think independently, take a critical relationship to tradition, and understand the significance of the tribulations and achievements of other people. The future of world democracy trembles in the balance." [Nussbaum, 2017, p. 30].

⁹ The increase in hourly subsidies in our country was recorded in connection with the teaching of history in response to the increase in extremism in society.

a dichotomy of two types of education. The first is profit-oriented education. The second type is the education, which aims at a more inclusive type of citizenship [Nussbaum 2017]. Democracy is the result of long human development, as is being said, we have not invented anything better. Is this the kind of social establishment that "... for every individual supports the chances of "life, freedom and striving for happiness"?" [Nussbaum, 2017, p. 61]

Nussbaum formulates the seven basic skills she considers to be the key in terms of maintaining the democratic character of our societies:

1. Ability to well reflect the political issues of one's own country, the ability to explore, to think, to argue and to discuss, and not to subdue thoughtlessly to the tradition and authority.
2. Ability to recognize that fellow citizens are people with the same rights as myself, and if they are different, I must regard them with respect as a purpose of acting, not as a profit-making tool.
3. Ability to express an interest in others' lives and understand what different political or other concepts mean for their lives.
4. Ability to create a clear understanding of various complex issues that affect the course of human life, not created from a set of data, but based on understanding of many human stories.
5. Ability to critically regard political leaders.
6. Ability to reflect on well-being of one's own country as a whole, not on well-being of a specific group.
7. Ability to see one's country as a part of complicated world system [Nussbaum 2017].

Humanities each us, above all, the imagination, creativity, and consistent critical thinking [Nussbaum 2017]. Their role in preserving the democratic nature of our future is so obvious. Every one of the abilities presented above is the result of using these skills, and it is clear, that the humanities have their strong place in the field of education, at least as long as we want to live in a democratic society.

The importance of humanities is also emphasized in the field of technological innovations sector, which can be very surprising given the circumstances in Slovakia, as we can find in the articles of Vivek Wadhwa¹⁰:

"Don't get me wrong. The world needs engineers. And no, I am not actually advising people to quit their jobs and get PhDs in philosophy. For some people, it might make sense, but for others it wouldn't. The point I'm trying to get across is more nuanced: We need musicians, artists, and psychologists, as much as we need biomedical engineers and computer programmers.

¹⁰ He is Distinguished Fellow and professor at Carnegie Mellon University Engineering at Silicon Valley and a director of research at Centre for Entrepreneurship and Research Commercialization at Duke

- For tech entrepreneurs and managers, there is no “right” major or field of study. While having a degree in slinging code may present a short-term advantage at start-up time, it may comprise an equally important disadvantage if the degree came at the cost of other critical “soft leadership” skills required to focus, lead and grow companies. So, it’s time for Silicon Valley to get over its obsession with engineers. And, if you run a start-up, hire that psychology PhD. You may get a lot more than you bargained for.” [https://www.washingtonpost.com/national/on-innovations/why-you-should-quit-your-tech-job-and-study-thehumanities/2012/05/16/glQAvibbUU_story.html?utm_term=.2c4436086ebe]

Also, George Anders refers, in his article That ‘Useless’ Liberal Arts Degree Has Become Tech’s Hottest Ticket, to the key role of humanities education for technical sciences:

„Throughout the major U.S. tech hubs, whether Silicon Valley or Seattle, Boston or Austin, Tex., software companies are discovering that liberal arts thinking makes them stronger. Engineers may still command the biggest salaries, but at disruptive juggernauts such as Facebook and Uber, the war for talent has moved to nontechnical jobs, particularly sales and marketing. The more that audacious coders dream of changing the world, the more they need to fill their companies with social alchemists who can connect with customers—and make progress seem pleasant.

Think of the ways the automobile revolution of the 1920’s created enormous numbers of jobs for people who helped fit cars into everyday life: marketers, salesmen, driving instructors, road crews and so on. Something similar is afoot today. MIT professors Erik Brynjolfsson and Andrew McAfee argue in a recent book, *The Second Machine Age*, that today’s tech wave will inspire a new style of work in which tech takes care of routine tasks so that people can concentrate on what mortals do best: generating creative ideas and actions in a data-rich world (...) Each wave of tech will create fresh demand for high-paid trainers, coaches, workshop leaders and salespeople..” [<https://www.forbes.com/sites/georgeanders/2015/07/29/liberal-arts-degree-tech/2/#49a9751040b8>]

Or by words of Kaitlin Phillips: „The humanities aren’t dead in the digital age. In fact, they powered it. They’re helping us understand it. And they’re what let our young people hone their creative edge and succeed in it.” [<http://remakelearning.org/blog/2014/03/13/why-silicon-valley-wants-humanities-majors>]

The concept of sustainable development¹¹ is only feasible in the context of a democratic society, as is evident from its focus on people, the planet, prosperity, partnership and peace [http://www.globalnevezdelavanie.sk/sites/default/files/pdfs/cvo_ciele_rozvoja_web.pdf]. Technologies can and, from the point of view of the environment, have to contribute to creating a world that will stand on the principles of sustainable development. We often forget, as Scott Hartley writes: “... that it is the application of technology that matters—its

¹¹ In the context of the sustainable development I consider also the work of A. Klimková to be very interesting and inspiring, she emphasizes the integration of place - based perspective (Klimková 2017).

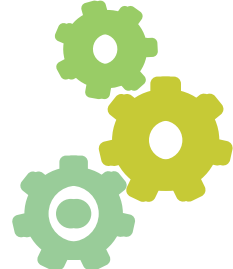
touch point, or friction, with human beings. After all, all technology is human; it is created of, by, and for the people (...)There is no way to build effectively for human beings without engaging in the study of human nature.” [<https://www.techinasia.com/talk/missing-silicon-valley-humanities>]. The absence of humanities education, due to the limitation of humanities, may result in an inability to evaluate the technological innovations changing our world with respect to man. This raises the question of what society voluntarily undermines the knowledge that is behind its boom:

“Humanities have been threatened from the very beginning. Socratic teaching is disturbing, and people who have power often prefer those who are willing to follow them rather than independent citizens able to think on their own. A vivid imagination, promptly responsive to the situations, aspirations and suffering of others, is a challenging act; moral dullness is much easier.” [Nussbaum, 2017, p. 256]

The crisis of democracy is a consequence of the crisis of humanities education and it is a jeopardy to the concept of sustainable development. Only a responsible actor, an actor perceiving a different aspect of reality, other than just an economic and technological one, can think of the world around him in the co-ordinates of values beyond his own profit.

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On certain problems of development of biotechnologies with an emphasis on sustainable development from the point of view of applied ethics

Abstract

Technological progress is responsible for a significant part not only of the economic, social, but also moral development of society. New technologies are of a dual nature. On one hand, they have the potential to solve many civilization problems, but on the other hand, they can, under some circumstances, also represent a significant threat to sustainable development. One of the monitored areas with enormous potential for applicability is the area of biotechnologies. They can make a significant contribution to the sustainable production of food, feed, environmental sustainability, and the like. To understand the specificities of moral problems linked to the emergence and development of biotechnologies, some of them are identified, e.g. the commercialization of biotechnology (science and research), the implication of fundamental moral problems, the issue of intellectual property (patenting) and others. We reflect these issues from the positions of applied ethics with emphasis on the precautionary principle.

Keywords: biotechnology, sustainable development, applied ethics, moral problems, precautionary principle

O niektórych problemach rozwoju biotechnologii z naciskiem na zrównoważony rozwój z punktu widzenia etyki stosowanej

Streszczenie

Postęp technologiczny jest odpowiedzialny za znaczną część nie tylko gospodarczego, społecznego, ale także moralnego rozwoju społeczeństwa. Nowe technologie mają

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podwójny charakter. Z jednej strony mają potencjał rozwiązania wielu problemów cywilizacyjnych, ale z drugiej strony mogą w pewnych okolicznościach stanowić poważne zagrożenie dla zrównoważonego rozwoju. Jednym z monitorowanych obszarów o ogromnym potencjale zastosowania jest obszar biotechnologii. Może ona w znacznym stopniu przyczynić się do zrównoważonej produkcji żywności, paszy, zrównoważenia środowiskowego i tym podobnych. Aby zrozumieć specyfikę problemów moralnych związanych z pojawieniem się i rozwojem biotechnologii, niektóre z nich są zidentyfikowane, np. komercjalizacja biotechnologii (nauki i badań), implikacja podstawowych problemów moralnych, problematyka własności intelektualnej (patentowanie) i inne. Odzwierciedlamy te kwestie ze stanowiska etyki stosowanej, ze szczególnym uwzględnieniem zasady ostrożności

Słowa kluczowe: biotechnologia, zrównoważony rozwój, etyka stosowana, problemy moralne, zasada ostrożności

In SOER 2015, "The European Environment - State and Outlook 2015 (A comprehensive assessment of the European environments state, trends and prospects, in a global context)", one can first read about the unprecedented speed of technological progress in areas such as computer science, communications, nanotechnology and biotechnology. This study, according to several authors, is too optimistic to evaluate the progress made as an opportunity to reduce the impact of human activity on the environment and hope to address current or future problems related to the depletion of natural non-renewable resources while improving the quality of life, stimulating innovation and sustainable development [Lubyová, Filčák et al., 2016]. However, new technologies are of a dual nature. On one hand, they have the potential to solve many civilization problems, on the other hand, however, under certain circumstances, they can also pose a significant threat to sustainable development.²

We believe that the risks and uncertainties associated with technological innovations cannot be eliminated by the application of legislative regulatory measures alone. Such an approach is more of a politician and it is a rather simple idea that, with the help of institution restructuring, policy approaches and environmental awareness, society will be better able to manage risky practices in promoting innovation and the penetration of new technologies. [Ibid]. We agree with D. Kováčová or A. Klimková that apart from

² The concept of sustainable development refers to the form of economic growth that meets society's needs in such a way that it creates welfare conditions not only in the short term, but especially in the long run. It is based on the assumption that development must meet today's needs without jeopardizing the opportunities for continued growth for future generations (for example, by exhausting non-renewable resources without finding alternatives, destroying ecosystems necessary for life, triggering environmental changes that greatly complicate the possibilities of man's survival as a biological species, etc.). For more details, see: Chreneková, Kobidová, Slivinská, Závodská. 2003. Trvalo udržateľný rozvoj. [online] 2003. [Cit. 20.04.2018]. Available online at: http://www.uvtip.sk/slovak/uvtip/iseu/index.php?page=id021&vyklad_id=100.

legal or political regulation of science, it is also necessary to talk about its moral or ethical regulation [Kováčová, 2016] i.e. that today, science, technics and technologies require not only legitimization that has the character of cognition and utility, but also moral legitimization [Klimková, 2017]. "This need saturates organizational and professional practice with new ethical challenges, new content that assumes that applied ethics will respond to the most diverse aspects of life and social practice, that it will evaluate and regulate our actions, and professionally approach it to address current topics and issues" [Klimková, 2017, p. 5]. The mission of applied ethics and its subdisciplines (bioethics, entrepreneurial and managerial ethics, environmental ethics, ethics of science and technology, etc.), also in the context of sustainable development, is "the rationale and permanent justification and revision of the principles, relevant theories, concepts and practical tools which will be put into practice and will make it possible to ecologize the organizational and engineering practice and to saturate it with the vision of sustainability" [Ibid]. According to applied ethician, A. Klimková, sustainability in the context of applied ethics represents also a moral category.

We have highlighted above that biotechnology is one of the perspective areas with potential for applicability, which can make a significant contribution to strengthening and sustainable production of food, feed, reducing water demand, improving health care and protecting the environment.³

The very concept has several meanings. In the broadest, biotechnology as an intensely developing area, they represent a set of processes that result in various useful products or technologies. That is why they are sometimes referred to all medical, gene manipulations along with ecological ones whose job is to protect nature. In order to overcome possible inaccuracies, we refer to the well-known definition from the document the Convention on Biological Diversity [1994, UN, Article 2], according to which biotechnologies represent any technology that uses biological systems, living organisms or their derivatives for production or specific use. They also include gene manipulations that represent only part of biotechnologies and are used to create new combinations of specific genetic material in such way, that individual genes, in the form of their material carrier DNA, can be transferred to other organisms in which they have not previously been present [Bartíková, 2007]. According to experts, the technologies of cell and gene engineering today belongs to the most important and genetically modified organisms are currently considered to be the basis of modern biotechnology. Under cell and gene engineering, we mean methods of manipulating cell structures (nuclei, chromosomes, mitochondria, etc.) or structures generating the genetic apparatus of living organisms (mainly DNA or RNA) to obtain virtually useful, beneficial effects.

The following applications relate to biotechnologies in this sense: manufacture of products important for humans and animals (e.g. vaccines, hormones, agricultural animal feed

³ For more details, see: Agenda 21, chap. 16, Environmentálne vhodné využívanie biotechnológií, p. 51. [online]. [Cit. 20.04.2018]. p. 51. Available online at: <http://www.minzp.sk/dokumenty/strategicke-dokumenty/>.

with added protein and vitamin preparations); the cultivation of new types of agricultural plants (e.g. soybean, potato or tomato transgenes); the creation of animals with the desired properties for medical purposes (e.g. transgenic pigs whose organs can be used for transplantation purposes); the "cultivation" of human organs and tissues from human body cells, which are capable to replace their own, affected by the disease (the results of research on artificial "cultivation" of lungs, pancreas, etc. are already known and they bring hope); production of new types of biological and chemical weapons.

In order to understand the specificities of the moral problems that arise in connection with the development of biotechnology, it is necessary to realize that the given field of human activity is based, or in other words, is linked to the two spheres of human work activity - to scientific research and industrial production. In addition, scientific research itself is increasingly becoming an essential part of biotechnology companies. It is possible to add to the common products they produce (medicines, vaccines, genetically modified organisms, etc.) not quite as common ones like know-how (knowledge). Therefore, the development of their own scientific (applied and basic) researches is stimulated not only by creating advantages in competitive struggle but also by the demands of a rapidly growing "know-how market" where the main form of knowledge is patent.

Biotechnology, in this sense, can be seen as:

- a) a type of engineering activity and industrial production in which elements of living nature (organisms or their parts) are the subject and also the mean of work activity;
- b) a market-oriented form of scientific activity in which one of the goods is knowledge.

Moral problems that arise as a result of the rapid development of biotechnology can then be presented on several levels:

1. On the level of ethical self-understanding of man, i.e. his relationship to himself and to the living nature.
2. On the level of results of the specificities of biotechnological activity, i.e. of what connects biotechnologies with other forms of engineering activity, industrial production and scientific research, as well as what is caused by the synthesis of sciences about life, engineering and industrial production.
3. On the level of objectives and tasks set in biotechnological activity. However, the problem calculation will not be definitive in this case as new applications of biotechnological approaches are still emerging.

We want to focus our attention, as an applied ethician, on a very specific and important feature of biotechnology development, which is the commercialization of science, scientific and technological progress. The factors that caused the emergence and development of the biotechnological industry (in the US in the 1970's) are more or less known. We will mention some of them: the increasing ability of scientists to "recombine", "produce" and "manipulate" DNA and other molecules; changes in the external environment

(administrative) that have reoriented researches into applied problems, as well as changes in patent law that have not only encouraged but have also led to the commercialization of discoveries, both in industrial and academic environment; a combination of researches funded by the government with venture funds interested in investing with the aim to create an expanded base of molecular-biological researches [Rabinov, 1996].

As a result of the commercialization, resources have been prepared which have been important for the further development of biotechnologies. It has transformed the understanding of science itself, formed a new identity of the "scientist - trader", and has led to changes in patenting practices.⁴ The pragmatic interest in protecting investments has changed the understanding of the world and added the form of market goods, the form of patent, to the fundamental scientific knowledge.⁵

In this context, we often come to the view that patenting in the field of biotechnology and biology is an unethical manifestation of egoism or a state system abusing the scientific work for profit. A more mundane version speaks for the benefit of pure science, where attempts to monetize its results are to be a major moral offense. The confrontation with these views is that the scientist, whom society has allowed to research, has a moral commitment to return the money spent by society through the economic exploitation of its results. In essence, it is about balancing the two interests - the inventor and the society. In practice, there is a set of problems in relation to who has the moral claim for the financial benefit of the patent [Drobník, 2008, p. 201].

The commercialization of science in the field of biotechnology has created a new market, a new type of goods, "new property rights", thereby accelerating synchronous analogous processes in the other sectors of biomedicine. In this context, we want to emphasize that the objects of commercial use are not only living organisms, or parts of the human body (genes or cells), but also genomes of the nations.⁶

⁴ In 1980, the US Supreme Court ruled that the creation of new forms of life was subject to the federal patent law, which allowed to gradually transfer to patenting of not only the artificially created microorganisms or laboratory animals, but also to patenting of human genes, human DNA, embryonic stem cells, etc.

⁵ The patent is a document that belongs to the system of intellectual property protection and the inventor has the right to commercial exploitation of his invention for 20 years. It does not imply ownership or consent to the commercial use of the invention, but, based on the patent, a right to use the invention may be granted to other persons through a license agreement. The subject of the invention, which may be a product, a chemical, a manufacturing process, a plant for production or utility, cannot be manufactured, offered for sale or used by a protected process without the grant of a license. The ethical aspect of the patent has been discussed since the 18th century. For more details, see: Drobník, J. *Biotechnologie a společnost*. Praha: Karolinum, 2008, p. 200-204.

⁶ According to some sources, the private Icelandic biotechnology company The Cod Genetic has bought an exclusive right to commercial exploitation of genetic materials and data of the Icelandic population for 12 years. For more details, see: Tiščenko, P. *Etičeskije problemy razvitiya biotekhnologii*. The trend of steady acceleration of development in this area can be monitored, inter alia when looking at the statistic data elaborated by the World Intellectual Property Organization (WIPO), when for example total annual number of patents granted worldwide in the year 2012 for the first time in history has exceeded the limit of one million and for a period of 10 years, from 2002 to 2012, roughly increased twice. For more details, see: World Intellectual Property Organization. [online]. 2013., p. 48. [Cit. 21.04.2018]. Available online at: http://www.wipo.int/export/sites/www/freepublications/en/intproperty/941/wipo_pub_941_2013.pdf

The transition of knowledge into production has created a new kind of ethos of a scientific community that is radically different from its original understanding (Merton, Sloup, and others). In the traditional academic science, the "knowledge-owner" was the scientist himself, which corresponded to the idea of his personal responsibility. Biotechnological corporations form corporate responsibility for gaining knowledge, and space for personal responsibility is narrowing down. At the same time, however, there is an idea of collective (corporate) responsibility or responsibility of the scientist towards the community. From the point of view of ethics, a new type of moral entity - a "scientist - trader (entrepreneur)" - is created, which should be governed by a "double" ethos. In the Anglo-American scientific literature, this contradiction between two ethos is sometimes terminologically defined as a personal responsibility and corporate accountability. According to Merton, the ethos of the scientific community includes the following principles:

1. Collectivism - knowledge as a result of scientific activity is social property (value). Each scientific knowledge is based on the results of previous research. The scientist must therefore understand himself as a member of the scientific community who, only in cooperation with other scientists, can carry out his mission. His duty is to selflessly share his scientific achievements with the other scientists and publish them.
2. Universalism - the assessment of the significance of the scientific discoveries of a scientist must be based solely on its objective meaning, irrespective of nationality, membership of the research institute, personal qualities, religious or political beliefs of the scientist.
3. Impartiality - scientific researches must be motivated solely by trying to get the truth in knowledge. Therefore, all non-scientific interests (economic, political, religious, a. o.) must be limited and excluded.
4. Organized scepticism - scientists must be critical not only to the results of other works but also to their own, for only by systematic criticism can the scientific ideas be "cleansed from errors" and approach the truth. The duty of the scientist is to constantly cast doubt on the acquired knowledge [Merton, 2007, Sloup, 2015].

What is the specificity of the ethos of the scientific community in which the subject is a kind of "hybrid of scientist and trader"? Since science is still science, the scientists still have the moral and methodological significance of the principles formulated by Merton. However, in situations where the scientist is also engaged in the role of a trader, these principles are increasingly "curtailed" and supplemented by a new system. The system of "new principles" was described by American sociologist J. Mitroff in the 1970's [Bourliaguet, 2016], when commercialization policy began to manifest itself more strongly in various areas of scientific research. In certain sense, they are in direct contradiction with those formulated by Merton and, with the emphasis on biotechnologies, they can be listed as follows:

1. Corporate egoism - knowledge as a result of scientific work is the property of a corporation. Knowledge and its results are patented and may be sold in the form of patents to other representatives of the scientific community.
2. Particularism (instead of universalism) - the assessment of the significance of the scientist's scientific discoveries must be based on their practical usefulness for the given corporation (the research institution). The corporation, however, tends to increase evaluation of its own successes and decrease evaluation of others.
3. Bias - (instead of impartiality) - scientific research is motivated mainly by the corporate interest of maximizing profits. Achieving the truth is an important moment in the process of gaining economic benefits.
4. Organized dogmatism (instead of organized scepticism) - researchers must be critical of the results of work of others. At the same time, however, "in the spirit of team play", they have to face away from the criticism focused on the results of "own team" work. Negative results, i.e. results that cast doubt on the effectiveness or utility of the products and services that the company sells, e.g. new vaccines or other drugs, are rarely published, they are the subject of "commercial (business) secret" of the corporation [Mitroff, 1974].

This contradiction between the two forms of ethos of scientific activity is the essence of conflicts of interest - a moral problem that the scientist often encounters in the field of biotechnology development. As a member of the scientific community, he must follow the principles of the "Mertonian ethos", and as a scientist employed in a biotechnological company, he must follow the principles described by Mitroff. Most notably, this moral conflict appears in the process of assessing the risks posed by biotechnologies.⁷

The issue of risk in relation to the development and use of biotechnologies is another of the current problems. We generally speak of the risk when the coming events of the future only appear to be probable, i.e. they may happen or they may not. When we talk about risks, we mostly mean those that are unfavourable. In some cases, the risk is referred to as a specific, precisely mathematically expressed rate of onset of an adverse event. "The risk assumes an important, statistically calculating probability of damage", because "an objective risk assessment is based on known relationships or logically deducted probabilities" [Mephan, 2005, p. 310]. In short, there are several views and risk concepts that we will not discuss in more detail.⁸

We want to focus the attention to risk as an ethical problem. If social morality is a fair consensus on what is worthwhile, what is beneficial for society, the risk can be interpreted

⁷ Let us point out to still unresolved dispute between biotech companies producing genetically modified products and their opponents from environmental activists.

⁸ We want to point out that there are institutions that deal with it, e.g. Hazard Analysis Critical Control Points (HACCP) – is dealing with analysis of risks of breaching the health and hygienic quality of food, identification of critical sites and their preventive control, the European Food Safety Authority (EFSA) which is known for its proactive position in the risk identification process.

as the likelihood of harm due to the failure of the applicable ethical principles and norms in society. In addition, many risks today are a threat to life on earth, and although we cannot influence climate changes, proliferation of weapons of mass destruction or the destructive effects of computer viruses, it is clear that applied ethics should be represented in the process of identifying and managing risks. Its representation is all the more important in this process if we realize that it can be a foreseeable (potential) risk that will occur later and can cause serious, irreversible and unforeseeable consequences. Such consequences have already been highlighted by environmental ethics or bioethics when pointing to environmental hazards (e. g. greenhouse effect and its impact on global warming and consequently on life and human health).

Responding to the risk posed by the development of biotechnology is an international ethical standard, in the form of international (national) ethical regulations, that determines the nature of responsibility of scientists, biotechnological corporations and companies in situations of uncertainty and risks. We refer to the precautionary principle, which as a normative (ethical) principle originated in the 1970's as a response to the ever-increasing risks in connection with scientific and technological progress, the environment and the life and health of man.

Although the notion of the precautionary principle is often used today and occurs in most important international documents, there is no uniform definition and explanation of it. According to us, the World Commission on the Ethics of Scientific Knowledge and Technology (COMEST) has provided the most comprehensive and the most suitable explanation for the point of view of the (applied) ethics. Let us try to point out the most important features of this principle:

- it is applied in cases where there is some risk in the form of possible damage to, or threat to the environment or human health;
- it must have its bases in some form of scientific analysis, it cannot be unreliable speculation or warning, but at the same time the existence of such a risk is not fully scientifically proven and confirmed;
- its application in the form of a specific intervention or regulation must take place before any damage occurs and at the same time, before the final confirmation of the fact, whether the proposed activity is or is not detrimental;
- Interventions or regulations should be proportional to the potential risk, so it is undesirable for applications of this principle to lead to more serious consequences than the ones that are to be avoided [COMEST, 2005, p. 13-14].

From the point of view of applied ethics, we would like to express the contents of the above-mentioned principles of the precautionary principle as follows: if human activity can bring a "damage" from a moral point of view that is indefinable and unpredictable, but it is real from the science point of view, the measures should be prepared that will help to

avoid or reduce this damage. "Morally inadmissible damage" represents damage to humans or the natural environment that: a) endangers the life or health of humans; b) is serious and practically unsolvable; c) is unfair to present and future generations; or d) neglects the rights of those who are affected by it.

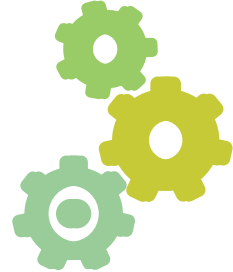
In conclusion, we would like to emphasize that:

- Sustainable development as a technocratic-managerial approach needs to be more humanized, deepen its axiological content, and normative and eco-ethical coordination [Klimková, 2017].
- In addition to the legal, political or economic regulation of science and (bio) technologies, moral or ethical regulation must also be spoken about and enforced.
- Although modern (bio) technologies offer several benefits, sometimes they are accompanied by the risk of harm to humans, animals and the environment. Therefore, ethical responsibility must take place (to look for a way to avoid or to address the risk).
- Bioethical (environmental) problems have led to the formulation and use of the precautionary principle (it is being used more and more frequently, but there are differences in its interpretation).
- The role of applied ethics (its subdisciplines) in the context of our research is "permanent justification and revision of principles, relevant theories, concepts and practical tools that will be transferable into practice and will allow to ecologize organizational and engineering practice and to saturate it with the vision of sustainability" [Klimková, 2017, p. 6].
- The contribution of individual disciplines of applied ethics lies in its specific analysis, which focuses on solving concrete practical and often extremely serious problems of life and practice of human societies [Fobel, 2011].

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Zarina KUDABAYEVA¹

The reform of theological education to foster effective interreligious dialogue

Abstract

This article examines the essence of theological education within the context of interreligious dialogue which is an integral part of sustainable development. The article reveals general characteristics of three monotheistic religions – Judaism, Christianity and Islam, – and based on them introduces the constituents of the concept of God, which in turn is represented in certain clusters and units. This approach is aimed at developing academic curriculum for Theological studies that would contribute to increase of theological literacy as well as facilitate the development of a common platform for interreligious discourse. It is important to understand that theological education is genuinely essential to build bridges and foster dialogue between representatives of monotheistic religions. Present research is intended to propose something new, both theoretically and practically, over the issue of theological education and assure its important role in public welfare.

Keywords: theological education, concept, cluster, religion, curriculum.

Reforma edukacji teologicznej w celu wspierania skutecznego dialogu międzyreligijnego

Streszczenie

W artykule przeanalizowano istotę edukacji teologicznej w kontekście dialogu międzyreligijnego, który jest integralną częścią zrównoważonego rozwoju. Artykuł ujawnia ogólną charakterystykę trzech religii monoteistycznych – Judaizmu, Chrześcijaństwa

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i Islamu – i na ich podstawie wprowadza składniki pojęcia „Bóg”, które z kolei są reprezentowane w pewnych klastrach i jednostkach. Podejście to ma na celu opracowanie programu nauczania dla studiów teologicznych, który przyczyniłby się do zwiększenia wiedzy teologicznej, a także ułatwiłby rozwój wspólnej platformy dla dyskursu między religiami. Ważne jest, aby zrozumieć, że edukacja teologiczna jest rzeczywiście niezbędna do budowania mostów i wspierania dialogu między przedstawicielami monoteistycznych religii. Obecne badania mają na celu zaproponowanie czegoś nowego, zarówno teoretycznego, jak i praktycznego, w kwestii edukacji teologicznej i zapewnienia jej istotnej roli w życiu społecznym.

Słowa kluczowe: Edukacja teologiczna, koncept, religia, klaster, program nauczania

Introduction

Interaction is a core activity of our universe – it occurs in various areas and on different levels. Social dimension of human life implies educational and cultural aspects that represent a major factor of prosperity. They are principal and determinative in any community. This article examines the essence of theological education within the context of interreligious dialogue which is an integral part of sustainable development. The article reveals general characteristics of three monotheistic religions – Judaism, Christianity and Islam, – and based on them introduces the constituents of the concept of God, which in turn is represented in certain clusters and units. This approach is aimed at developing academic curriculum for Theological studies that would contribute to increase of theological literacy as well as facilitate the development of a common platform for interreligious discourse. Knowledge itself has a great power – creative and inventive, whereas ignorance leads to destruction and fail. That is why educational issues are principal in building of healthy humankind. Education as a compound process covers multiple spheres of our life. Its multilevel structure includes religious education as well. The phenomenon of religion is quite old and is present in many cultures throughout the world; it plays an active and influential role in formation, functioning and development of any society. It is important to understand that theological education is genuinely essential to build bridges and foster dialogue between representatives of monotheistic religions. Present research is intended to propose something new, both theoretically and practically, over the issue of theological education and assure its important role in public welfare. Education for sustainable development encourages the acquirement of knowledge, building understanding, preserving values and taking actions required for creation of a sustainable world, which ensures environmental protection and conservation, promotes social equity and strengthens economic sustainability. Theological education, being a constituent of a great system, has a definite influence over the course of events in it.

However, there are currently problems and challenges in this field that testify to the need of certain changes in overall corpus of theological education. Therefore, the issue of the future of theological education and question of how it can remain actual are important ones.

What is Theology?

The scientific status of theology is a subject of many discussions that last for centuries. The presence or absence of this aspect does not deprive theology its value and purpose. **Theology is faith seeking understanding**, which means that theological knowledge and profound academic training are necessary to study and analyze underlying presuppositions of contemporary value systems of definite religion. **Theology is faith seeking dialogue** which is focused on intentional conversation that occurs between God and man – God's revelation is an action oriented towards man, his creature. Theological education should be based on a dialogical principle and approach, not a monological one. Religion is a conversation held between God and man, and between one man and another, it is a dialogue that takes place in history of humankind. A person who is open to the dialogue with others, lives in the present and is ready to perceive and learn from others and sincerely share with them one's reflections, so that they can grow together in the seeking, revealing and understanding of truth. **Theology is faith seeking action**. Education induces formation of worldview and aims to shape a person for a better world.

In many countries the religious education has been an issue of disputes for years and still it is a subject of various debates and conflicts. In some countries such education is compulsory in the national education system (Poland, England, Israel, Turkey, some countries of the Middle East, etc.), nevertheless, these studies are oriented to those who profess the religion of the state. Academic teaching of religion is not only a process, but is a complex design. In the context of education it is first of all refers to the curriculum of study. Such design is essential and critical. The point of interest in this article is religious education which is particularized to the theological studies of monotheistic religions (Judaism, Christianity, Islam) in higher schools, to be precise – at universities on Master's degree programmes.

The term *Theology* was closely associated with Catholic doctrine since the very beginning, however nowadays this notion is also applied to the religious doctrine of Judaism and Islam. Over the centuries the scientific content of Theology was in doubt. In my article I will not go into the details whether Theology is a science or not since my approach presumes it is as such. My concern lies with the design of curriculum for Theological studies which would encompass three monotheistic religions. Theology students today are faced with the important task of contributing to modern culture. This requires a thorough and interdisciplinary academic training. That is why I would like to draw the attention to developing new curriculum to prepare highly trained scholars with critical minds.

The faculty of Theology, irrespective of country, is not a common phenomenon. For instance, in Kazakhstan, there are theological studies that are available only in few universities over the whole country, and all of them are limited to Islam. Unfortunately, there is no Theological faculty that provides study of Christianity or Judaism. The same situation exists in many other countries. The development, accomplishment and introduction of curriculum for Islamic education, that became available in the beginning of the 21st century in the civil university, became a kind of renaissance of tendency for religious literacy in the country. Kazakhstan, being a multinational country in the heart of Eurasia, has a rich history of cultural interaction and up to nowadays it experiences peaceful coexistence of various religions which in turn contributes to sustainability of this country. Sustainability is not something that is taken for granted, therefore people and government are in constant need to support and promote intercultural approach on many platforms, taking into account religion as one of the major aspects. I strongly believe that regardless of country, nation and culture, the theological education in higher schools is a subject to further development and promotion – new approach and methods must be applied. This reform implies first of all curriculum for study, which in my opinion, must include the subjects of three above mentioned religions – Judaism, Christianity and Islam. From the first sight, these religions are incompatible and it might seem impossible to align them. However, everything depends on approach and methodology. Further in my article I will present this methodology in visual and graphic design. First of all, I would propose to start considering these religions not as contestants for each other, then this will allow us to search for and build new common platform. I suggest to build such platform, that is, to develop integrated curriculum for the faculty of Theology, which would cover main subjects of each of the religion. My method consists in the specific idea, namely, approach to the study of the concept of God and design of curriculum with the help of **cluster analysis**. I am convinced that academic teaching of Theology can not be conducted in isolation from other religions. Religious studies that are taught at the faculties in many countries do not provide a deep insight into each of the religion – as we know, it only reports on the main ideas without their relation to each other, that is, profound comparative analysis. The methodology I am proposing in this article has the following tasks:

- To provide deep insight into the core of each of three monotheistic religions;
- To allow students to see each religion in the context of the other two.

Theological literacy is a key factor which has to facilitate many actual issues regarding interreligious and intercultural dialogue. I presume the following results of education (as per proposed consolidated curriculum):

- Serve as an instrument to eliminate misunderstanding among representatives of monotheistic religions and cultures where they are professed;
- Contribute to creation of a just, equal, tolerant, peaceful environment and social integration of the representatives of monotheistic religions.

The principal notion (thesis)

The centre of these studies is the **concept of God**, which is the major concept among all. Monotheistic religions are the ones where the notion of *sacrum* had revealed in full, that means, all what this idea includes, had been reflected in God who appears as a Personality. In comparison with other beliefs, which sometimes are called 'religion', monotheistic religions have this fundamental characteristic. In monotheistic religions the belief system, the value system, and the action system are all three determined in a significant way by the conception of God as one unique and personal being.

The thesis which is taken as nodal sounds as follows: **God is a Personality**. This statement is applicable to the theology of Judaism, Christianity and Islam. The followers of each of these religions believe that God is a Personality, so I took this as the starting point for developing my curriculum. I divided this curriculum into three parts which I call 'clusters'. Reflecting on this statement we can continue: since God is a Personality, He **speaks** and **acts**. There is a revelation of God in Judaism, Christianity and Islam. The term **revelation** deals with how God has made himself known to humankind. God's revelation of Himself has been given to humanity by both actions and words. This allows us to conclude:

God is Personality → I can **meet** with Him → I can **perceive** Him

There is an example of manifestation of God in three monotheistic religions:

Judaism (Torah):

מְכִילָא יִנְחֹלֶשׁ הִיְהֵא לְאַרְשִׁי יִנְבֹּל רַמְאָת הַכּ רַמְאִיו הִיְהֵא רְשָׁא הִיְהֵא הַשֵּׁם לֹא מִיְהֵלֹא רַמְאִיו

And God said unto Moses: 'I AM THAT I AM'; and He said: 'Thus shalt thou say unto the children of Israel: I AM hath sent me unto you.'

Shmot 3:14

Christianity (Bible):

"And God said to Moses, 'I AM WHO I AM.' And He said, 'Thus you shall say to the children of Israel, 'I AM has sent me to you'"

Exodus 3:14

Islam (Quran):

يَرْكُذِلْ ءَالَصَّالِمْقُ أَوْ يَنْدُبْ عَافِ أَنْ أَلْإِلَهِ أَلْإِلَهِ أَنْ يَنْنِ ١٤

I-I am God. There is no God but I. So serve Me, and practice the prayer for My remembrance.

Surat Ta Ha (Chapter 14:20)

According to the methodology I suggest, the task of the student is not only to learn the history and doctrine that exists in Judaism, Christianity and Islam, but **to meet with the**

real image of God that is supposed to be discovered or, better to say, revealed during the studies. This in turn does not mean one should convert to another faith (which is not excluded as well), but the student who believe in God of religion of his own, must get acquainted with the God in which the other one believes. This approach implies **considering** and **conceiving the concept of God** characteristic to other two religions **being in your own religion**. It would help to understand the followers of other monotheistic religions – their vision, perception and reflection on the concept of God.

The concept of God was taken as the starting and supporting point in developing the structure of curriculum. This work has lead to idea of **clustering**, based on conception of **cluster analysis**.

Division into clusters

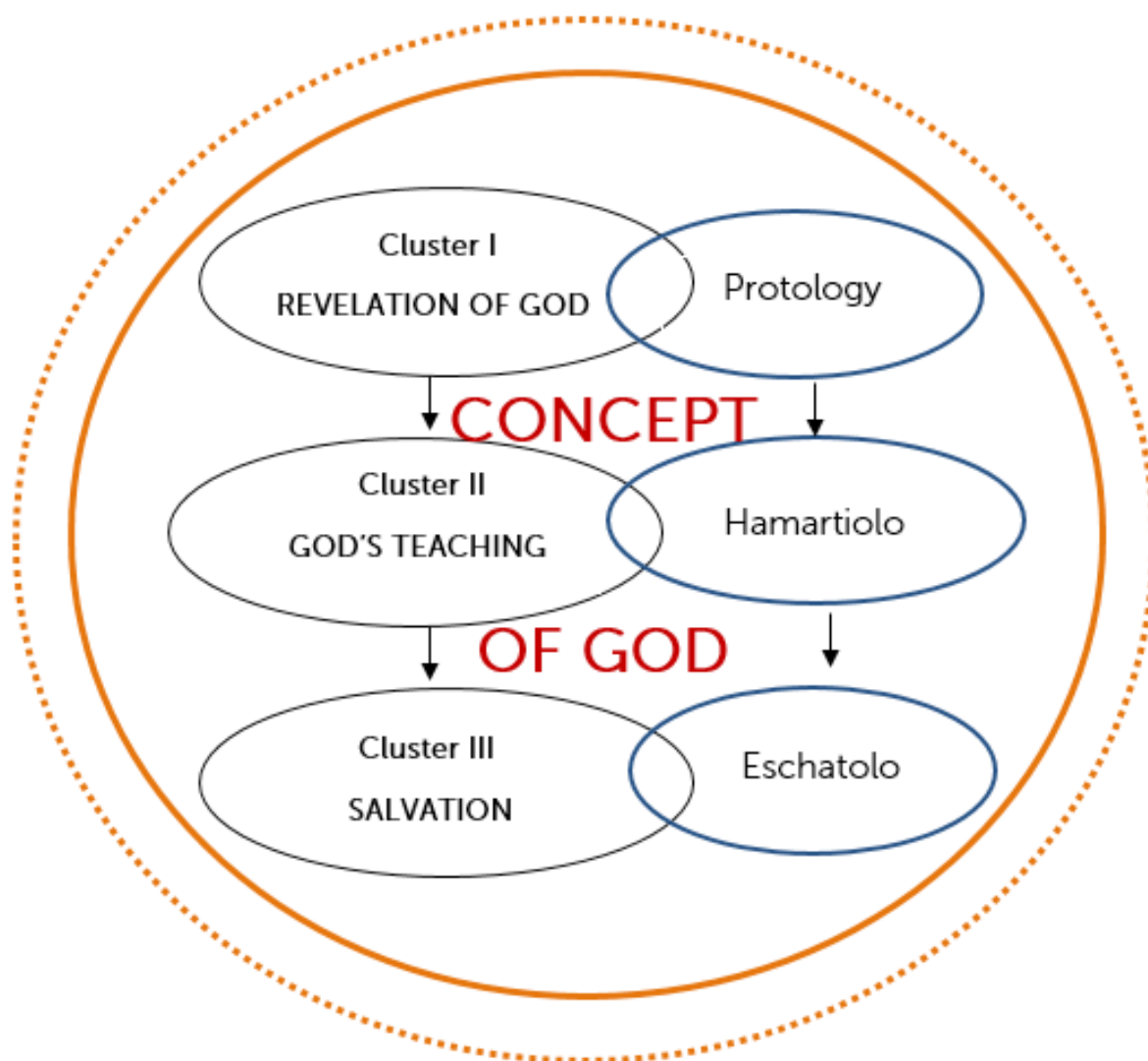
“Cluster analysis divides data into groups (clusters) that are meaningful, useful, or both. If meaningful groups are the goal, then the clusters should capture the natural structure of the data. In some cases, however, cluster analysis is only a useful starting point for other purposes, such as data summarization. Whether for understanding or utility, cluster analysis has long played an important role in a wide variety of fields: psychology and other social sciences, biology, statistics, pattern recognition, information retrieval, machine learning, and data mining. Cluster analysis groups data objects based on information found only in the data that describes the objects and their relationships. The goal is that the objects within a group be similar (or related) to one another and different from (or unrelated to) the objects in other groups. The greater the similarity (or homogeneity) within a group and the greater the difference between groups, the better or more distinct the clustering” . Division into clusters not only helps to arrange the curriculum, but contributes to interdisciplinary approach. Considering the applicability of clustering in the fields, mentioned above, I decided to use this approach in designing of curriculum.

All sacred Texts contain manifestations of God in His deeds and words, so the aspect of Revelation of God is the basic one that is why I titled the **Cluster I** of Curriculum as **‘Revelation of God’**. This Cluster would cover studies of God’s words and actions within the context of Sacred Texts. Thus, the focus is shifted from the study of Sacred Texts as such to the God’s manifestation.

The second criterion of my division is **God’s Teaching**, which is first must be defined within the scope of such notions as **sinfulness** and **sanity**. In the **Cluster II** the focus is on understanding the etiology of sin, which results in building of moral principles of any religion. Consequently, this Cluster would also include **Theological Ethics**, **Family Studies**, **Law Components** and **Practical Theology** (pls see Table).

The last Cluster relates to the notion of **Salvation**, that is, questions of **Eschatology**. This Cluster classes would be aimed at understanding the essence of God's Promise from the perspective of such phenomena as **life** and **death**, as well as notions of **resurrection**, **Last Judgement**, **eternal life (Heaven)**, **condemnation (hell)**.

Fig. 1. The concept of God and its constituents



Source: own elaboration

Fig. 2. The Clustering For Academic Curriculum Of Master Studies

Cluster I: Revelation of God			
Category	JUDAISM	CHRISTIANITY	ISLAM
Protology: notion of creation, purpose, human nature			
Unit A			
God says: What; When; How;	Torah, Neviim, Ketuvim	Old Testament, New Testament	Quran
Unit B			
God acts: towards man; towards creature	Torah, Neviim, Ketuvim	Old Testament, New Testament	Quran: wahy and ilham
Cluster II: God's Teaching			
Hamartiology: notion of sin, sinfulness, sanity, good, evil, suffering			
Unit A			
Theological Ethics (incl. Family Studies)	Conjugal and Family Ethics; Political and Social Ethics; Jewish Bioethics	Sexual, Conjugal and Family Ethics; Environmental Ethics; Medical Ethics; Business Ethics; Christian Political and Social Ethics; Bioethics	Akhlaq (morality) and adab (etiquette) in the life of a Muslim; Conjugal and Family Ethics; Business Ethics; Political and Social Ethics
Unit B			
Law Components	Halakhah (Jewish Law)	Canon Law; Marriage Law of the Church; Organisation of the Church; Rights and Obligations of Christian Faithful	Aqidah; Methodology of Islamic Law (Uşûl al-Fiqh); Marriage; Dissolution of marriage; The rights of children; Custody; Guardianship; Alimony and maintenance
Unit C			
Practical Theology	Life Cycle: Ritual, Liturgy, and Music	Liturgy and Sacraments; Pastoral Theology; Catechetics	Jurisprudence of Five Pillars (Arkan ad-din, Arkan al-Islam); Islamic Spirituality
Cluster III: Salvation			
Eschatology: notions of life, death, resurrection, Last Judgement, afterlife, Hell, Heaven			
Unit A			
Concept of life and death in Sacred Texts	Torah, Neviim, Ketuvim	Old Testament, New Testament	Quran
Unit B			
Last Judgement and Resurrection	Jewish messianism; The World to Come (olam haba); Resurrection of the dead	The Second Coming of Christ; Universal resurrection; Last Judgment	The Islamic Signs of the Times (minor signs, major signs); Major figures; Major events; Judgement Day (Yawm al-Qiyamah)
Unit C			
Hell, Heaven, Purgatory	Gan Eden (Garden of Eden), Gehinnom	Purgatory; Immortality; The Renewal of All Creation	Concept of 'Jannah'

Source: own elaboration based on the reviewed literature

*The curriculum does not include philosophical subjects, since it is presumed that they are studied in the early stage (Bachelor's degree).

Hermeneutics oriented curriculum

Theological study of any religion requires knowledge of Sacred Texts and ability of their interpretation, that is, hermeneutics. The word hermeneutics is derived from *Hermes*, who according to ancient beliefs, was the messenger of the Greek gods. The origin of the Greek verb *hermeneuein* means "to make something clear, to announce or unveil a message". Hermeneutics originated during the Greek Enlightenment due to attempts to understand writers such as Homer, hermeneutics was an activity oriented to interpretation of the texts. This connected hermeneutics with the linguistic disciplines of philology, exegesis, and textual criticism. Theologians inherited earlier classical scholars' experience and methods and succeeded in developing "the rules and conditions which governed the valid interpretation of texts". Present Curriculum is oriented on teaching theology through the prism of Sacred Texts. Each Cluster contains Units which cover the study of essential notions in the context of Sacred Scriptures of Judaism, Christianity and Islam. It must be noted that every single concept is considered on the basis of what these texts contain. Hermeneutics in this curriculum is applied in a special way: texts of the Sacred Scriptures serve as the underlying principle for perceiving of fundamentals of faith. The Clusters allow student to cognize the image of God in each of three studied religions by becoming aware of the notions and their connotation from theological perspective. The study of Sacred Texts is continued throughout the whole course – each Cluster unit has references to the Sacred Texts and the notions it contains are interpreted in inextricable link with them. When designing present curriculum I used a deductive approach. Such a division into Clusters helps to put in order the main concepts and define the component parts. The concept of Revelation of God, God's Teaching and Salvation are present in all three monotheistic religions. They are the fundamental notions which contain many other essential elements. To be a competent Theologian one must possess knowledge about other religions, without this the theological knowledge would be incomplete. In my opinion, the study of doctrine of the religion one confesses must go with the study of the fundamentals of faith of other monotheistic religions. I am convinced that the future of Theological education and theological literacy as such lies in integrated teaching system. This in turn should not be limited to the reading books on religious studies – such familiarization with other religion would be partial and external. The program of study should be compound and provide a thorough insight into the religion through the prism of concept of God. I believe such method would raise Theological education to a higher level. This Curriculum is a sort of draft which is subject to further development and improvement, that requires close cooperation with theologians and religious authorities of each of monotheistic religion.

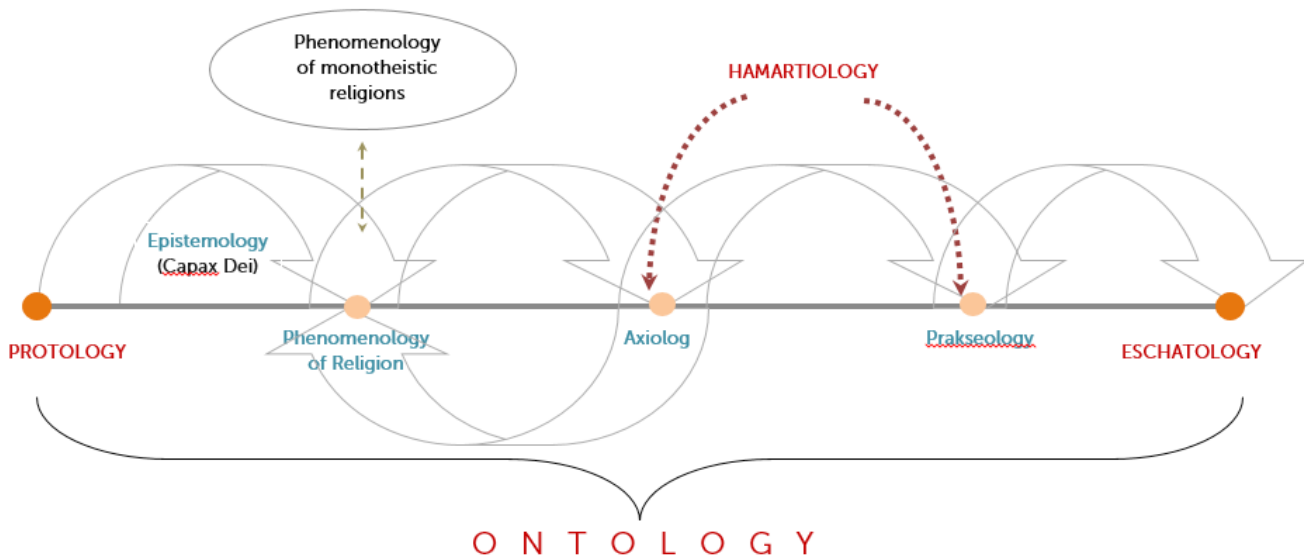
Conclusion

Religious ignorance leads to pathological phobias, aversion and rejection towards adherents of different faith. Ignorance has a specific power to damage and destroy, and sometimes it happens in a latent, but very effective way. Integrated theological education is intended to encourage building the bridges between countries and nations. It also remains one of the critical elements that conduce to proper functioning of a system called society. The idea of development of integrated theological education and realizing it in higher schools seems to be unreal to fulfill for many reasons. Some of them are as follows:

- lack of those who would support such interreligious approach (commonly there is a wrong apprehension which is usually reflected in the opinion that such methodology may include some risks and dangers in sense of proselytism);
- complete autonomy and absence of model of dialogue and interaction between the religions (Judaism, Christianity, Islam) that would serve as a base for development of integrated theological education;
- seclusion and underestimation of cooperation;
- lack of knowledge on doctrine of both one's own religion and another one's that results in origin of wrong stereotypes and intolerant approach towards another religion and its adherents.

These problems do not make this project impossible to implement. To overcome the obstacles stated above is a great challenge and task for those who worry and care about prosperous future of humanity. It is a challenge for people from all the fields, not only academic and religious ones. Nevertheless, the proposed project – academic curriculum for Master's degree studies – is not utopia, but a chance to resign from bounded thinking and open up to another person, one's inner world, culture, country, and to agree on friendly walking which destination is one and the same – seeking and finding truth. Faith is an everlasting attribute of a human being and humankind in general. It is eternal and will never die out. The callings that arise in the contemporary world require new reflections and methods that would help to preserve and deliver the essence and meaning of faith in the light of human dignity and its favourable development. This is bounded to happen in the environment of paradoxes: continuous evolution with its internal constant struggle that leads to growth and progression, but in contrast bears implicit threat for preserving the treasure of human origins and its history of world and self-cognition.

Fig. 3. Base Scheme for Development of Academic Curriculum for Theological Studies (Master's degree programme).



Source: own elaboration

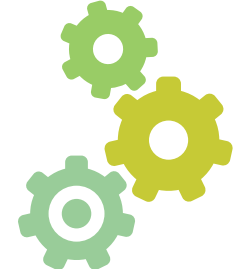
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Mateusz LISAK¹

The impact of the unsustainable development of individual ports on the global trade in the Indian Ocean according to the Graeco-Roman sources

Abstract

The issue of sustainable development is usually considered in the context of current events and modern politics or economics. However, this phenomenon occurred not bound by time or space. The above article is an attempt to study this occurrence in the case of Roman commerce in the Indian Ocean. Its structure and diversity provide sufficient grounds for particular research, and we have sufficient source materials to make such an attempt. On the basis of ancient works, one can notice a wide variation between the level of development of individual regions located on the Indian Ocean. It is also possible to notice the consequences of these deficiencies for both the Romans and the local population. The picture presented in the treaties indicates the lack of sustainable development led to the limitation of potential incomes as well as the consolidation and deepening of already existing economic and civilization differences.

Keywords: Roman trade, trade on the Indian Ocean, Roman economy, ancient economy, ancient India

Wpływ niezrównanego rozwoju poszczególnych portów na handel globalny na Oceanie Indyjskim w źródłach grecko-rzymskich

Streszczenie

Kwestia zrównoważonego rozwoju rozważana jest zwykle w odniesieniu do bieżących wydarzeń i współczesnej polityki oraz ekonomii. Zjawisko to jednak jest bardziej uniwersalne. Powyższy artykuł stanowi próbę zbadania owego fenomenu w przypadku

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handlu rzymskiego na Oceanie Indyjskim. Rozbudowana i wieloaspektowa struktura tej wymiany stanowi płaszczyznę, na której przestrzeni możliwe jest dokonywanie analizy równowagi rozwoju poszczególnych regionów, a także samego handlu. Na podstawie starożytnych dzieł zauważyć można daleko idące zróżnicowanie między poziomem rozwoju poszczególnych regionów leżących nad Oceanem Indyjskim. Przedstawiony w nich obraz wskazuje, iż brak zrównoważonego rozwoju przyczyniał się do ograniczenia potencjalnych dochodów, jak również utrwalania i pogłębiania już istniejących różnic ekonomicznych i cywilizacyjnych.

Słowa kluczowe: handel rzymski, handel na Oceanie Indyjskim, gospodarka rzymska, ekonomia starożytna, starożytne Indie

1. Introduction

Commerce remained an integral part of the economy of the Roman Empire. The combined turnover of trade between the Romans and the people surrounding the Indian Ocean is estimated about one billion sesterii [P. Vindob. G 40822; Strab. Geog. 17.1.13]. However, it was necessary to receive attractive merchandises on both sides of exchange to develop the trade. Moreover, it required a suitable space for exchange, as well as proper administration and infrastructure. All these factors sustained a significant impact on that with whom, using which goods and how often the Romans traded and on what scale. The particular settlements could be more suitable for the exchange if well-developed, and this was contributing to the increased incomes on both sides. Sustainable development of settlements on individual trade routes would allow optimizing the benefits from the commerce. The scheme was reflected broadly in the structure of the exchange presented in the Greek-Roman sources.

The development of trade in the ancient Indian Ocean was a multi-century process. The representatives of the ancient world undertook first maritime contacts through the Indian Ocean during the reign of Ptolemy VIII Euergetes. In this time the royal guards encountered an Indian castaway and delivered him into the court. In gratitude, he steered an Egyptian ship to India two times in 118 and 116 BC with Eudoxus of Cyzikus on a board. This was the beginning of creating trade routes along the southern Arabian coast, to India and the Horn of Africa [Strab. Geog. 2.3.4-6]. Trade expanded during the Ptolemaic period, however, it was not taking place on an impressive scale. After a century of regular travels, no more than twenty ships left the Ptolemaic kingdom each year according to Strabo [Strab. Geog. 17.1.13]. The Augustus' conquest of Egypt in 30 BC changed diametrically a political situation in the area. The Roman Empire entered a time of prosperity and had all reasons to invest its resources in a new branch of economy. Not many years later the

Romans launched two war campaigns. Augustus sent one army to Ethiopia against the Meroe Kingdom and the second to Arabia Felix. In this time no less than 120 ships sailed to India each year only from Myos Hormos port [Strab. *Geog.* 17.1.13]. It is unknown what was the overhaul number of vessels departing from Egypt to India. The trade provided benefits for all participants. Private entrepreneurs risked their lives in pursuit of wealth; the senators offered them loans and received interest and the state collected exchange taxes. The latter income could cover the costs of up to 20 legions every year [*P. Vindob. G* 40822; Strab. *Geog.* 17.1.13; McLaughlin 2014].

The discovery of a direct route to India was the final significant change in the Indian Ocean commerce. It allowed the Romans to make the exchange more global and reach even as far as China [*Hou Han Shou* 12; *Peripl. Mar. Eryth.* 57:19.5]. However, there is no certain information about the discoverer. The author of the *Periplus Maris Erythraei* referred to his name in the context of the transoceanic path only. The discovery itself remains a mystery as it is unknown where and when this adventure took place. It could not be made later than the first half of the I century AD as the ancient guidebook is dated to this period. The discovery shortened the whole coastal route to India by half. Moreover, it allowed additionally to reach Limyrike faster, to Sri Lanka [Plin. *HN* 6.24] and after that even as far as to Tanzania [Ptol. *Geog.* 1.9].

The Romans encountered many obstacles on their way to wealth. One of them was the lack of sustainable development and differences in the level of civilization in particular areas. This generated the need to understand the nature of specific regions, an involvement of economic slacks and recognizing a demand for Roman goods. Nevertheless, the exchange initiated by the conquest of Egypt had an essential long-term influence on the Indian Ocean area. The purpose of this article is to consider the impact of development sustainability on exchange from the Roman and local entrepreneurs' perspective.

2. The natural conditions of the global trade

Establishing a global trade on the Indian Ocean was possible due to several specific features of the area. First of all, an almost permanent northern wind dominated the Red Sea making so-called wind-regime on it [Davies 1995, p. 29-30; Facey 2004; Strab. *Geog.* 17.4.5]. This caused sailing downward very fast but it was more challenging to travel up to Egypt. The sailor made attempts to enter the Red Sea during the beginning of the New Year or later to limit this problem [Plin. *HN* 6.26]. It allowed catching a southern wind after crossing the Bab-el-Mandeb strait occasionally [Davies, Morgan 1995, p. 29-30]. The monsoon winds were the second factor as they occurred in two forms exclusively. During the winter season, it blows from north-east but changes direction to the south-west in the summer. The wind was a perfect driving force and a guidepost, what allowed sailing across the open waters without risk of stacking in the middle of the Ocean. It equally determined the dates

of traveling to particular regions as well as the returns of merchants. This issue was crucial for sailors. The seamen could not come back before the wind reversed the direction and they might be forced to stay in the area until the upcoming season [*Peripl. Mar. Eryth.* 32:11.1-8]. The occurrence of seasonal breezes allowed also to avoid the risk of windless days and dangerous coast. That reduced the risk of getting stuck on the shore or breaking on rocks due to the unfavorable wind. In addition to these two basic determinants, the presence of local currents (e.g. Mozambique Current), as well as water whirls (e.g. Great Whirl or Socotran Gyre) also influenced the trade's organization. In addition to factors of natural origin, the level of development of various regions and in particular ports was of immense importance for the trade routes' organization. The local infrastructure was not essential to the convenience and safety of mooring if using little ships. The limited size of the unit remained even a favorable factor in the case of lack of ports or if sailing in shallow waters. It facilitated navigation upriver as well. Then again, it limited the number of goods that could be taken and the size of supplies. That was crucial in overcoming such vast distances as those in the Indian Ocean. For this reason, the Romans started operating large vessels from the middle of the 1st century AD, and with full rigging system – including bezan, artemon, and topsel [Casson 1995].

3. The size of the vessels and ports

The Roman merchant ships have faced many difficulties due to their size, the location of each port and the lack of adequate infrastructure. Using large units allowed for an increase in the exchange rate. Although the vessels risked breaking on rocks and getting stuck [*Peripl. Mar. Eryth.* 43:14.21-15.3, 45:15.13-20; Strab. *Geog.* 2.3.4-6]. Such units could not enter every port as the mooring to a too shallow bank might lead to the rollover of the ship. In the event of a change in weather, this was a very big problem, and it was necessary to move to a safer harbor quickly [*Peripl. Mar. Eryth.* 12:4.22-26]. Hence, the lack of developed infrastructure could discourage some buyers from exchanging because they did not want to risk their wealth and life. This, in turn, reduced tax revenues and the ability to improve the port. It was probably one of the reasons why the trade was divided into many smaller anchorages into the economically underdeveloped regions and why limited to one main harbor within developed countries².

The ship's susceptibility to the port's development depended also on the goods transported by it. If merchants carried their goods in amphorae or glass, then their sensitivity to damage might cause their breakdown. In this case, the merchant could lose both the expensive amphora and the substance stored in it. For this reason, the traders divided the ship's deck into at least two categories. Some goods were stored to the need for current purchases and others kept deeper on the board and sold only at destination ports [Casson 1995,

² Kingdom of Axum – Adulis, Sabaean-Himyarite Kingdom – Muza, Hadramaut Kingdom – Kane, Indo-Parthians – Barbarikon, Sakas- Barygaza, Kingdom of Chera – Muziris, Pandya Kingdom – Nelkynda.

s. 198-199]. Merchants had to transport them to small boats and then to the market, what increased the risk of damaging the merchandises. The traders had to compensate these factors by increasing the price. On the other hand, the ruler of the settlement would have to develop the port if he wanted to make the trade more comfortable [wine: *Peripl. Mar. Eryth.* 6:2.32-3328:9.1339:13.949:16.2056:18.20].

Unbalanced development of ports reduced the number of settlements which the Roman merchants could visit. The occurrence of monsoon winds limited the sailors, so their time spent on individual trade routes was strictly defined by these restrictions. The area with poorly developed port required using additional smaller boats. It was necessary to transport products several times, what consumed a lot of time. If the goods were unsold, they would have to be moved again by the same route. The comparable situation happened with purchased goods. In the case of *Hermapollon* ship, the whole cargo was about 200 tons [e.g. *P. Vindob. G* 40822; De Romanis 2012]. Transporting a significant amount of goods could be very time-consuming if implementing this method. By limiting the factor, it would be possible to travel to other ports and thus to a more balanced distribution of the trade route.

The balanced level of settlement development could have led sailors to repair their ships on a place. The Romans spent one or even two years on travel before returning to their home ports. At that time, their ship was gradually decaying, rotting, and attacked by plants and sea animals that were looking for tough wood for their growth [Peacock, Blue 2011, p. 186]. This phenomenon concerned the hull mainly, which good condition in the case of sailing through the Indian Ocean was particularly needed due to the impact of waves and monsoon winds. Its gradual weakening could have lead to collapse on the coastal shipping. In addition, the development of fauna and flora increased the hindrance generated by the hull, thereby reducing the speed of the ship. These factors might have encouraged Roman sailors to seek ports where they could make appropriate repairs. It rather concerned merchants sailing through the open ocean than those who traveled along the Somali coast. In addition to restorations, it was still necessary to purchase and repair rigging elements, what required similar technological development. The ship itself was a considerable investment generated the costs needed to preserve it [Hopkins 1983, p. 84-109]. The larger the unit was, the higher the cost it required. However, maintenance was necessary to the efficiency and durability of the ship.

A technological barrier might have appeared in some ports, and a ship could not be repaired if the difference in the shipbuilding methods was too great between the Romans and the local population. Sailors from the Empire most likely had the most advanced vessels sailing in the Indian Ocean [*Peripl. Mar. Eryth.* 7:3.18-20, 15:5.29-30, 16:6.3-4, 19:6.29-31, 21:7.23, 27:9.8-10, 33:11.18-19, 36:12.4-6, 36:12.7-9, 57:18.30-19.2, 60:20.5-10; *Purananuru* 56.18-21, 343.6-7]. For this reason, if the highly technologically advanced element of the ship was destroyed, the sailors would be unable to service it. This technological gap was

the cause of the creation of Roman colonies in some of the ports probably [e.g. *Peripl. Mar. Eryth.* 56:16-22,60:20.6; *P. Vindob. G* 40822; *Tabula Peutingeriana*]. If there were boat builders among the settlers, then they could perform services in the field of ship repairs and manufacturing of rigging elements. Technology would gradually pass from the Romans to the local population in that case [more: Whitewright 2008, p. 5-65]. For this, it was necessary to have a balanced and continuous trade between the Empire and the certain area. It would lead to a constant inflow of new population, as well as supplying them with desirable goods produced in the homeland.

Cotton is an example of technology transfer due to a properly balanced trade. The plant not occurred naturally in Europe and has appeared in Egypt with the Roman sailors from at least the first century AD [Handley 2003, p 57; Wild, Wild 2001, p. 213]. The cotton was mainly used for sails, although we do not know whether this was due to the lack of flax in India or this material was more suitable for the good-quality sheets' production [Handley 2011, p. 321-334]. Archaeological finds suggest the adoption of Indian cotton for the canvas' manufacture, although the method of creating a weave plexus was other than in the subcontinent [Handley 2003, p. 57; Wild, Wild 2001, p. 213].

Sustainable development was important not only in the macro scale but also in the micro one in the case of ports participating in Roman commerce. Each individual village involved in the exchange had to have not only the right port but also a suitable place for trade as well as efficient administration [Arnaud 2011, p. 66]. Although the latter is associated typically with tax collection, it has had a fundamental impact on maintaining trade security.

4. The influence of statehood on the trade

In the case of trade without any control by the state, no authority could provide legal security or even physical one for the buyers. The traders did not pay any taxes in such a situation, but no one protected them against robbery or fraud [Arnaud 2015, p. 12]. The state had to fight against piracy and smuggling, protect of buyers, as well as regulate meeting places, and also ensure safety and quality of the goods [Polyb. 3.22-25]. Merchandises placed in the city and intended for trade were kept in a state warehouse, which was apparently aimed at counteracting illegal commerce. Before a sale, the merchant had to declare the content of the product and its price and then the tax was calculated and paid based on that amount [*P. Vindob. G* 40822]. The goods required checking, weighing, evaluation, sealing and payment. If the buyer falsified the goods, he was punished, like in a case when he broke the seal or damaged it. Similar mechanisms were also found in Indian countries [*Arthaśāstra* 2.21-22].

The government was a guarantor of free trade. Merchants on both sides (a buyer and a seller) could be sure that they would not be cheated only in the case of involvement of the state in the exchange [Arnaud 2011, p. 66]. In addition, the authorities fought piracy,

but it was also the only one who had the resources and funds to invest in the commercial infrastructure of settlements. Development was not limited only to the expansion of ports but it was more balanced. In the case of the Romans ports there is known several investments into watchtowers (*praesidia*) and water stations (*hydreuma*) on the road from Berenike and Myos Hormos to Coptos [Bernand 1984, n. 56]. The same involvement took place during the Ptolemaic period and due to the transport of elephants [Plin. HN 6.26; Strab. Geog. 17.1.45; Cohen 2006, p. 320]. The government made the efforts to create suitable conditions for trade by reducing risk. This might force countries to reduce the number of places where the trade could take place legally because of the whole organization of security and administration was very expensive [Jackson 2002, p. 105]. The cost had to be compensated by profits. For this reason, as it was mentioned, governments might make attempts to limit the number of ports involved in a trade. The larger the scale of trade was, the more administrative resources were needed for efficient trade management. On the other hand, trading outside the designated places was a simply smuggling [Polyb. 3.22-25; Arnaud 2015, p. 12].

5. The level of development in individual ports

The Roman ports were probably the best-adapted cities for a large-scale trade on the Red Sea. The Berenike settlement could receive units with a tonnage of up to 350 tons [Sidebotham 2011, p. 195]. In addition, a well-developed state apparatus functioned there, which was caused not only by trade with the East but also by the need to manage distant areas and mines in the region. The city served as an administrative settlement in both the Ptolemaic and the Roman times [Sidebotham 2011, p. 85-86; Thomas 2012, p. 178]. For these two reasons, it was necessary to create a local administrator's office with above-average powers [*praefectus montis Berenicidae*, Cavenaile 1970, no. 132, p. 220; n. 299, p. 227; n. 528, p. 236; n. 601, p. 239; n. 1295, 1307, p. 269; n. 1715, p. 286; n. 1962, p. 296; n. 2068, p. 301]. This enabled efficient port management and quick decision-making in problematic situations [Bernand 1984]. Otherwise, it would be necessary to wait for a response from more high-level officials which resided in Alexandria or even Rome.

Myos Hormos was also a well-developed port. It is mentioned by many ancient chroniclers, i.a. Agatarchides [Agath., *On the Erythraean Sea*, 5.83], Diodorus Siculus [Diod. Sic. 3.39.1-2], Strabo [Strab. Geog. 16.4.5, 16.4.24, 16.4.45, 17.1.45] the author of the *Periplus Maris Erythraei* [*Periplus Maris Erythraei* 1:1.2], Pliny and Ptolemy. The city expanded during the Roman times. There was a road from the settlement to Coptos which was still used for transport of goods during a reign of Hadrian and even longer probably [Bernand 1972, p. 40-42, 116-120]. The author of the *Periplus* called this port "designated for trade" (*apodedeigmenos*). The description indicates an official destination of the harbor to conduct commercial activities. It is possible this statement was used to distinguish the

commercial port from Berenike which had also administrative functions [Bongard-Levin, Bukharin 2004, p. 135; Thomas 2012, p. 178]. In the case of Myos Hormos, it is known that ship repairs and shipbuilding took place there [Sidebotham 2011, p. 197].

We know less about the other ports on the Indian Ocean. Ancient sources rarely provide actual data, and if they do so, descriptions are not rich in details. Archaeological research, in turn, faces a number of problems. The Somali ports, although identified, are located in areas where it is problematic to conduct safe research. The location of Indian ports is often ambiguous or impossible to find (e.g. Barbarikon) and others are already underwater (e.g. Muza). For this reason, it is very difficult to accurately determine the level of development of individual settlements. Nevertheless, it is possible to present their technology and civilization advancement in some degree of generalization.

Ports on the African side of the Red Sea definitely varied in each other in their level of development. Ptolemais Theron did not provide a harbor, but a safe anchorage for small ships only [*Peripl. Mar. Eryth.* 3:1.17-18]. In the case of the Adulis port, in turn, it was necessary to move the mooring place due to attacks of the barbarians [*Peripl. Mar. Eryth.* 4:2.1-4]. Nevertheless, the author of the treaty does not mention unusual difficulties in entering the port. It contains information suggesting the presence of Roman agents in the settlement in its description [*Peripl. Mar. Eryth.* 6:2.32; Casson 1989, p. 112]. A list of goods is wise even if most of the imported merchandises are everyday products [*Peripl. Mar. Eryth.* 6:2.23-3.4]. This suggests a minor role of Ptolemais Theron and greater of Adulis, proportional to their development.

The Somali ports and the East African Rhapta show a lack of infrastructure or an advanced civilization level. The settlements were not formed into one state, and each of them was ruled by a local governor, despite the close distance from each other [*Peripl. Mar. Eryth.* 14:5.14-16]. In addition, they mainly imported simple and first-aid items [*Peripl. Mar. Eryth.* 7:3.-14.5, 17:6.14-20]. The port of Avalites had a harbor only for rafts and small ships [*Peripl. Mar. Eryth.* 7:3.15-16]. In Malao there could be found the only a roadstead which partially protected the ships from the wind [*Peripl. Mar. Eryth.* 8:3.23-26]. In Mundu vessels moored not to the settlement but to a near island [*Peripl. Mar. Eryth.* 9:4.2]. Mosyllon offered a poor port on the beach [*Peripl. Mar. Eryth.* 10:4.7-8]. In the Spice Port, the traders were in the most dangerous situation. Sailors had to stay on the open roadstead and transport their good in smaller crafts due to shallow waters. The vessels were unprotected in any way and they were vulnerable to winds and storms. The author of the *Periplus* suggested in his description of the port that surrounding waters changed its color and became turbid. When this happened, the ships sailed to the nearby cape called Tabai where they could find a cover [*Peripl. Mar. Eryth.* 12:4.22-26]. This fragment suggests the sailors were looking for indications which accompanied dangerous events. There is no information about Rhapta's anchorage, but only that some black tall men who maintained ancient relations with the Arabs and who purchased iron tools predominantly [*Peripl. Mar. Eryth.* 17:6.14-20]. None

of the African settlements had a port capable for large vessels in the light of the guide. Only some of them offered a mooring place (Adulis, Mundu, Malao, and Mosyllon), other a roadstead (Malao, the Spice Port) or were available nothing but for small crafts (Ptolemais Theron, port of Avalites).

The Arabic settlements showed better and more balanced development. The city of Muza did not have a harbor, but it offered a sandy shore suitable even for large units [*Peripl. Mar. Eryth.* 24:7.31-8.1]. Moreover, a Roman colony was present there probably [*Peripl. Mar. Eryth.* 24:8.5-6]³. The harbor of Arabia, Eudaemon had many ports in the past but the city was destroyed [*Peripl. Mar. Eryth.* 26:8.24-25]. In the case of Kane, the author of the guide does not inform us of the port [*Peripl. Mar. Eryth.* 27:9.1-12]. This suggests there were no particular difficulties in entering the city. It seems the Arab ports were better adapted to receive ships than the Somali one. No less, it is problematic to say whether the difference took place due to natural conditions or human activity.

State administration and legal thought were also better than in African settlements. In Pliny's opinion, the cinnamon trade took place in the Kingdom of Gebanites by a state monopoly and public auction [Plin. *HN* 12.42]. Moreover, the description of incense's cultivation and transport in the country of the Hadramauts indicates a far-developed and conscious trade policy of the rulers [*Peripl. Mar. Eryth.* 27:9.8-10, 29:9.28-29, 32:11.1-7]. This suggests an ability of individual Arab tribes to create compound economic and legal tools. Only in this way it was possible to redirect the whole production of incense to merely one port, as well as to introduce and enforce state monopoly. In addition, they were able to impose taxes on Roman ships, even if they did not buy their products [*P. Vindob. G* 40822].

The Indian settlements were the most diversified in terms of development. Historians provided also more information on them. The first of these ports called Barbarikon was located in a hard-to-reach place, in one of seven branches of the Indus River. In addition, it was the only navigable one [*Peripl. Mar. Eryth.* 39:13.13-14]. The inhabitants of the area had a very deep understanding of political and administrative thought. One treaty concerning this issue survived to modern times. *Arthasastra* did not have only an advisory and theoretical role, but it already contained solutions and legal proposals accumulated by generations. Although dating the treaty remains uncertain, it includes a compilation of centuries-old tradition and experience. The treaty suggests various tax rates for foreigners and the local population as well as diversification of charges depending on goods' types. In addition, it is implied to create a stamp system and official bidding. Taxation should base on a declaration of the price given by a selling merchant. If there was no interested and the good was unsold, then the trader had to pay another tax as when he exported the commodity. On the other hand, the officials would organize an auction if there were many willing buyers [*Arthasastra* 2]. Although the goods entered the realm in the port

³ This is indicated by the purchase of Roman money, grain and wine despite own production.

of Barbarikon, the entire trading process took place in the capital of the country – in Minnagar [*Arthaśāstra* 2.21; *Peripl. Mar. Eryth.* 39:13.5-6]. For this reason, it was necessary to introduce a very rigorous system of state seals and warehouse as well as penalties for those trying breaking the law [*Arthaśāstra* 2.21].

Barygaza was the next famous Indian port which shows a similar level of development of economic thought but was very difficult to reach. The settlement was located in the Gulf of Khambhat and upstream of the Narmada River. This reservoir is characterized by the occurrence of very high tides which posed a huge threat to the Roman ships. In addition, the coast was rocky, there were internal currents as well as shallow waters. For this reason, the royal fishermen were sent to guide ships across dangerous waters [*Peripl. Mar. Eryth.* 43:14.21-15.3, 45:15.13-20]. As the author of the treaty points out, it was a very hazardous journey for sailors who came to the port for the first time [*Peripl. Mar. Eryth.* 44:15.4-7]. The settlement did not have an extensive port but offered mooring places. A local ruler called Nahapana [Μανβάνος in the *Periplus*, *Manbanos* – *Peripl. Mar. Eryth.* 41:14.2] pursued a policy of favoritism of foreign traders. He promoted the exchange of the Roman coins into local currency by an advantage in that exchange [*Peripl. Mar. Eryth.* 49:16.23-25]. Cash was only a carrier of precious metals in the perspective of the Indian buyers, and the merchants risked they were falsified [Plin. *HN* 6.24]⁴. The Roman traders could purchase more goods if they replaced their money for local currency than if they would like changing their bullion directly for merchandises. Thanks to this, the ruler increased the purchasing power of the newcomers but at the same time, he expanded the stocks of silver and gold in the kingdom. It is visible among others in improved quality of coins during the ruler's reign [Seland 2010, p. 54]. Thus, there is visible far-reaching state intervention in the economy and a high level of development of economic thought. It was probably one of the reasons why this port was considered the most important in the Indian Ocean [Casson 1989, p. 199-200].

Southern India seems less developed than the northern part of the subcontinent. The author of *Periplus* described the Tamil countries as permanent rivals and informed about pirates in the area [*Peripl. Mar. Eryth.* 53:17.26-27, 54:18.29-19.6, 59:19.24; Plin. *HN* 6.21, 26; *Tabula Peutingeriana*]. The ports of Muziris and Nelkynda were located upriver. Trade took place in the city itself in the case of the first settlement but in the second the unloading and loading processes happened at the harbor called Bakare [*Peripl. Mar. Eryth.* 55:18.8-11]. It made the second one more suitable for trade as the merchants could leave their large vessels in the anchorage and transport the cargo by smaller crafts. In Muziris it was necessary to risk an upriver travel. The issue was noticed also by Pliny the Elder, who favored the second port due to above-mentioned problems [Plin. *HN* 6.26]. It is possible to observe the issue in Tamil sources as well probably [*Purananuru* 343.6-7].

There is only a little known about the economic and legal thought of the local population.

The author of the *Periplus* described the whole region as belonging to three rival countries

⁴ The ruler of Sri Lanka also perceived Roman coins as an ore carrier. For this reason, he was surprised that all coins were of the same weight, although different rulers appear on them.

what is not entirely a truth [*Peripl. Mar. Eryth.* 53:17.26-27, 54:18.29-19.6, 59:19.24]. During the Roman period, particular areas were ruled by one of three major dynasties (Chera, Chola or Pandya) or local chieftains, who occasionally allied with each other or with greater power [Chattopadhyaya 2009; Vacek 2013; Champakalakshmi 1996]. The political structure of South India looked more like a chieftains system than a rivalry between full-created state organisms. Some scholars even see a state-building factor in the global trade and source of improvement in administration and urbanization of the area [Champakalakshmi 1996]. The issue is very important as the ports involved in the trade were also a subject of military operations [*Akananuru* 57.14-17, 149. 7-13]. The inland cities and metropolises seemed to be better developed and the urbanization process was more advanced than on the outskirts.

All major Indian ports were difficult to reach. They were located up the rivers and the one most often visited (Barygaza) was also inside the gulf where there were very severe water tides. For this reason, local conditions favored using rather small crafts with a shallow draft than the large vessels [McLaughlin 2014, p. 96]. When the Romans came, their ships seemed huge to the people of India [*Akananuru* 149.7-11; *Purananuru* 56.18-21, 343.6-7]. These descriptions were of Tamil origin, which made them not so exact if used to analyzing the northern part of the subcontinent [*Arthaśāstra* 2; Champakalakshmi 1996]. The eastern coast of India was not well-known during a time of the *Periplus'* author and Pliny the Elder. Due to this reason, there is no information about the area and any attempts of analyzing it would be just speculations.

An unsustainable level of development of settlements was often accompanied by the phenomenon of piracy. It occurred in the case of Adulis, where the trade took place on a large scale but the Axumite Kingdom was just in process of forming itself [*Peripl. Mar. Eryth.* 4:1.19-2.4]. The Muziris port was another example where the pirates were present. They functioned in the north of the city for centuries and were strong enough to even hold some settlements [*Peripl. Mar. Eryth.* 53:17.26-27; *Plin. HN* 6.26; *Tabula Peutingeriana*]. It was a result of no adequate military protection in the trade route probably. It should be understood as lack of a sufficiently developed state apparatus which could efficiently oppose the piracy. This, in turn, depended on a scale of the exchange. Both ports in this case – Adulis and Muziris – were important exchange centers. These factors could discourage the Romans to trade with ports or it would be necessary to hire mercenaries for protection. However, this required additional costs what decreased potential incomes.

6. Summary

The lack of sufficient development of the settlement also affected the productive and purchasing power of individual cities. This phenomenon is particularly visible in the case of East African ports. The lack of one major trade center forced mooring to numerous

markets to make wanted purchases. This, in turn, meant that each settlement was willing to buy items primarily of everyday use and was unable to afford to build suitable ports [Peripl. Mar. Eryth. 7:3.15-16, 8:3.23-26, 9:4.2, 10:4.7-8, 12:4.22-26, 17:6.14-20]. A structure of trade like that in the area was unfavorable for large vessels⁵. They could not sail freely near shallow waters or moor on the shore easily. The use of smaller units for trade was time-consuming. A large ship would have to do this process more than once like in the case of Indian ports, but many times because of the number of settlements. Therefore, it generated feedback. Due to the lack of sufficient development, the exchange could not take on a large scale. Moreover, as the commerce was limited, the settlements did not have the need and the opportunity to develop. Insufficient level of statehood could be the reason trade in southern India has contributed to the civilization development and why in Somalia not [Champakalakshmi 1996].

The inability to repair ships in ports was another consequence of unsustainable development. Lack of sufficient infrastructure and statehood made it impossible to provide legal protection for the newcomers, which could have discouraged migration. It would lead to low interest in a given region. This, in turn, consolidated the division into a civilized and barbarian world. We can observe this partition in the presence of potential Roman agents in all major ports on the Indian Ocean but not in Somali settlements or Rhapta [Peripl. Mar. Eryth. 6:2.32, 24:8.5, 28:9.17, 39:13.9, 49:16.23-24, 56:18.18]⁶. Exchange of population is another symptom [alomon 1991, p. 731-736; Tomber 2000, s. 630], and it might lead to transfer a technology [Whitewright 2007; Whitewright 2008, p. 61, Sridhar 2005, p. 67-73] as well as shipbuilding and making trade agreements [i.a. Arikamedu and Muziris. P. Vindob. G 40822; Tabula Peutingeriana]. The trade could be also a city-forming factor if there were suitable conditions [Peripl. Mar. Eryth. 25; Plin. HN 6.26; Ptol. Geog. 6.7].

The world described by Pliny the Elder and the author of the *Periplus* seemed to be developed unsustainably. The regions which had already-existing sufficient civilization level could receive many benefits from the global exchange [Peripl. Mar. Eryth. 49:16.23-24]. Other, which had not developed statehood, purchased tools, clothes, and beads mostly [Peripl. Mar. Eryth. 7:3.16-21, 8:3.26-32, 10:4.6-13, 12:4.26-28, 13:5.3-6, 14:5.8-13]. No less, the trade could also be a stimulus for further changed in case of middle-developed areas [Peripl. Mar. Eryth. 25; Plin. HN 6.26; Ptol. Geog. 6.7. Champakalakshmi 1996]. It seems, therefore, that sustainable development was necessary for the global trade. Otherwise,

⁵ In Casson's opinion there were no physical barriers for using large vessels. However, he did not concern other economic factors. Casson 1989, s. 34-35.

⁶ However, only in Adulis it was mentioned that the money was sold for foreigners. No less, the Romans offered grain and wine in Arabian ports even if there were the own production. In the case of Indian ports, the trade was tremendously expanded, and the administrative regulations required knowledge about actual prices in the area. This could lead to introducing agents into cities for adequate information. Grain and wine were used in Rhapta only as a gift for the local chieftain. However, it is possible sailors used these supplies during their long stay in the port. Peripl. Mar. Eryth. 17:6.16-17. also: P. Vindob. G 40822; Tabula Peutingeriana.

the production resources might have been unable to meet purchasing power. The underdevelopment and overgrowth of individual players of such exchange strengthen the division that lasts until our time probably.

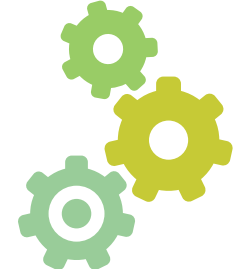
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Lukáš MORAVEC¹

Work – important phenomenon of human life

Abstract

The article will focus on the work as the important part of the human life. We consider it necessary to point to the transformation of the work, at present, not only the nature of the work is changing, but also the expectations of the work process. The work as the essential part of the human being's lives must also be parameterized by the aspect of the sustainable development, finding relevant strategies, which will be able to guarantee work for the human beings in the future as well. The future strategies need to be contextualized as part of the postfoundationism in the applied ethics. The work is the source of the social contacts, it should be the place of the self-realization, not only the source of the income. We consider it important to emphasize that it is necessary to consider the automation and robotization of the production, also in terms of the risks, which it brings with it - the disappearance of the work. The new conditions and demands for the automation and robotics work may not currently be able to adapt to everyone. It is necessary to preserve the work for the diverse spectrum of the human beings as the important part of the human life.

Keywords: Work. Applied Ethics. Transformation. Sustainable Development.

Praca - ważne zjawisko ludzkiego życia

Streszczenie

Artykuł skupi się na pracy jako ważnej części ludzkiego życia. Uważamy za konieczne zwrócić uwagę na przekształcenie pracy, obecnie zmienia się nie tylko charakter pracy, ale także oczekiwania związane z procesem pracy. Praca jako istotna część życia

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istoty ludzkiej musi być sparametryzowana przez aspekt zrównoważonego rozwoju, znajdowanie odpowiednich strategii, które będą w stanie zagwarantować pracę także ludziom w przyszłości. Przyszłe strategie muszą być kontekstualizowane w ramach postfundacjonizmu w stosowanej etyce. Praca jest źródłem kontaktów społecznych, powinna być miejscem samorealizacji, nie tylko źródłem dochodu. Uważamy za ważne podkreślenie, że konieczne jest rozważenie automatyzacji i robotyzacji produkcji, także pod względem ryzyka, jakie niesie ze sobą - zanikania pracy. Nowe warunki i wymagania w zakresie automatyzacji i robotyki mogą nie być obecnie w stanie dostosować się do każdego. Konieczne jest zachowanie pracy dla różnorodnego spektrum istot ludzkich jako ważnej części ludzkiego życia.

Słowa kluczowe: praca. Etyka stosowana. Transformacja. Zrównoważony rozwój

1 Introduction

We want to focus on the phenomenon of work as an important part of society. The main question will be the future of work in the context of the transformation of society. What forms will work have? Can all people adapt? How do people perceive work in concert? Is there an ethical reflection of work? All questions are serious. In the text, we will focus on a brief summary of the views that can respond to the issue. Each single question could be a separate article. We want to point out the importance of ethical parameterization of work. Ethics is only mentioned when the processes fail, people forget about the preventive nature of ethics. In employment, a person spends most of his time and life. People are aware of the importance of work only when they lose it. In addition to the financial aspect, socialization is also leading. Work influences attitudes and values, and at the same time determines social status, which can often be a negative phenomenon. From this point of view, work should not be seen only from an economic point of view. An important aspect is the ethical aspect of work, its contribution to both society and the individual.

2 Work

A work², in a human life, fulfills important functions, while underlies to various changes. As an example, we can mention a transformation of an industrial society to an information society³, bringing many changes, which are reflected in a way of the work and expectations

² A work is an employment, an activity of a human being for which he/ she receives a financial reward.

³ See Toffler, Formation of New Civilization, 1996. A transformation goes through a work itself. The second wave (industrial) and the work in it, characterizes simple, powerful, routine and repetitive work. The third wave (information) is characterized by unmistakable work, which also increases an entitlement of employees. The increasing specialization and rapid changes cause changes in the employee's requirements, and therefore it is not possible to easily replace the employee.

of it. There are growing demands on both employees and employers. The work is no longer just a place for human beings to make a living. They seek for the work, which will interest them, internally fulfill - it will become the place of their self-realization. The work is an important part of the human life, while it has different definitions. In the following paragraphs, we offer several definitions of the work from an aspect of applied ethics.

Fobel [2000] states that the work is a source of a wage, social contacts and is a physiological need of the human being, while is still changing the way of inspecting the work. The work has to be open to changes, opportunities to participate in a management, place of self-fulfillment and satisfaction. The work helps to satisfy the human beings' basic physiological needs for an organism, and at the same time is focused on creating certain values, which are associated with a philosophical aspect. The work is always done in a certain social environment, whereby one gets in touch with other members of the society. The work, is therefore a social phenomenon, is linked with a social life of the human beings. The social aspects of the work are:

- it takes place in the certain social environment,
- satisfies social needs,
- means used at the work are a result of activity of others,
- each activity is to a certain extent individual, creative, socially beneficial and significant,
- is a part of wider social activities, requires a cooperation,
- social environment creates conditions for the work, education and socialization.

The work and its importance have gradually changed in a historical context. "The work is understood in sociology as a purposeful activity of the human beings, in which the human being transforms nature (environment), but also himself/ herself and serves to satisfy his/ her needs. It is a basic condition of an existence of the human being and society. It develops mental and physical abilities, is part of socially coordinated activities and is a prerequisite for social changes" [Fobel, 2000, p. 62]

"When it comes to the human work, the following are generally accepted: the work as a source of incomes, and as the mean of self-realization of the human being, an application of his/ her creative powers, an expression of his/ her mental and physical abilities, as a creation of richness of a landscape, a source of a continual improvement of the means, by which the human being creates his/ her own world" [Remišová, 2001, p. 102].

The work is one of the natural needs of the human being, while it also ensures a survival in his/ her social environment. The right to work is enshrined in the Constitution of the Slovak Republic. "Citizens shall have the right to work. The State shall guarantee, within appropriate extent, the material welfare of those who cannot enjoy this right without their own fault" [The Constitution of the Slovak Republic, Sec. 3m Art. 35].

By working, the human being transforms his/ her surroundings, in terms of a survival and a quality of life. Primarily, in order to survive in nature, he/ she had to adapt his/ her surroundings to his/ her needs. At present, he/ she is still adapting to his/ her surroundings, often with a view to satisfy the needs. A development of modern technologies, consuming lifestyles and other related factors (negative consequences) has developed the idea of sustainable development - life. It is about finding the way of development that will be sustainable in the long run. There must be a model⁴, which is acceptable, fair, viable and sustainable, has included social, economic and environmental aspects. This means that it can preserve favorable living conditions for future generations as well.

Therefore, the work needs to be parameterized from the standpoint of the applied ethics, to meet the demands of the employees, employers and environment. The consensus could have come about through increased ethical parameterization of the work. This would be possible through institutionalization of the ethics to the work and management process. In an organization, an emphasis would be on the ethics, efforts would not be only a profit, but also good workplace relationships, a generally beneficial action, a good name of a business, a long term orientation of an activity and an elimination of negative consequences.

The ethics in the business should have its place, especially nowadays. Not enough to generate the profit, the society asks for greater responsibility of the companies for the actions. The business profit is just one of the many business stimuli. Another stimulus can be nonprofit goals, values (correctness, addressing customers, providing true information) [Smreková - Palovičová, 1999].

The work and an entrepreneurship are being studied mainly from the economic point of view, which makes everything look rational, in terms of returns and losses. The applied ethics have techniques to implement the ethical aspects in the business sphere as well. The economics has once again dealt with the ethical issues, while it should pay attention to the ethical issues, even nowadays, as is pointed out by the author A. Sen⁵. "I would like to prove that an economic science could achieve better results, if it devotes greater and explicit attention to the ethical considerations, which the human behavior and decision form" [Sen, 2002, p. 19]. The economics is based on two different ideological roots. The source of the ethics based on the economy is mainly concerned with the study of the ethics and politics, with the questions about how the human being should live and seek the social benefits. The second ideological resource currently prevails and is distinctive orientation to the logistical point of view. The aims are considered to be directly determined and interest is in finding the appropriate means to achieve them. Each way is beneficial, their combination is appropriate [Sen, 2002].

⁴ At present, many documents and strategies are included and supported by sustainable development. Examples are documents such as Agenda 21, The Treaty of Lisbon, The Europe 2020 Strategy and many other strategic documents of transnational organizations (UN, UNICEF,...).

⁵ Amartya Sen, Ethics and Economics, 2002.

From the point of view of fulfilling the concept of the sustainable development, it is also necessary to consider the ethical perspective, which has the long term orientation and is conducive to good life. We can develop corporate responsibility of the company towards all stakeholders, employees, environment or society. Our intention is to focus on the phenomenon of the work, in terms of the sustainable development.

The sustainable development in the Slovak Republic is legally defined by Art. 6 of the Act no. 17/1992 Coll. on the Environment. It is the "development, which preserves present and future generations of the opportunity to satisfy their basic living needs, while not diminishing the diversity of the nature and preserving the natural functions of the ecosystems."⁶ The sustainable development in the Slovak Republic is legally defined by Art. 6 of the Act no. 17/1992 Coll. on the Environment. "The sustainable development means a targeted, long term (ongoing), comprehensive and synergic process, which affects the conditions and all aspects of the life (cultural, social, economic, environmental and institutional) at all levels (local, regional and global) and addressing such functional model of a particular community (local and regional community, country and international community, which satisfies the biological, material, spiritual and social needs and interests of the human beings, while eliminates or severely restricts interventions of threatening, damaging or destroying conditions and forms of the life, does not burden the country, rationalizes its resources and protects cultural and natural heritage."

The sustainable development is the long term complex process, which can affect all aspects of the life. It focuses on the society model, which qualifies for the various needs and interests of the human beings and eliminates or significantly reduces the negative factors, which threaten the preservation of the life and its resources. It also deals with the efficient use of the natural resources and use of the renewable resources, in terms of preserving (quality) life for the future generations as well. But our focus will be on the sustainable development in terms of the work and its transformation, which presents certain risks. Mareš's opinion is just one of the many insights onto the work, not all opinions are perceived in a positive aspect, the extent of the work did not allow us to analyze all opinions.

Mareš [2004] states that the work in the industrial society was an integrating element, it became the basis of the individual's self-confidence, allowed them a social interaction with the environment, was an axis, around which they focused their personal and social identities and life projects. A wage of the employees allowed the human beings to live at the certain standard of the living, identified them with the human beings with the same social status. The work was the place of the self-realization, created means for leisure activities. The work has also been perceived as the self-improvement and one of the important sources of the ethical standards in the society. Being unemployed and out of the work was something abnormal, reprehensible, as the employment and the

⁶ Act no. 17/1992 Collection of Laws - Act on the Environment.

work got religious significance, they represented something as a way to a salvation. The unemployment was understood not only as a state of the material need, but also as a social disaster. The human beings had certain skills and strengths, which they improved to get the work. If the wage was motivating, they applied their skills in the work. The paid work has already been highly standardized and normalized. This was the reason, why the work began to be non-compliant. With the development of the information technologies and the gradual automation of the work, the whole society and the work started to transform. Mareš [2004] states that in the 60's, the work began to be fading away, when the scientific and technological progress in its visions revealed production exempted from the human resources. The work was becoming automated, the human beings were just to set it up and control it. The manual work is receding according to vision. The first phase of the fading work was the outflow of the human beings among the sectors, while the work did not disappear, just moved. In the second phase, there was the outflow of the work from the industry to the services, where there was a problem, when the work actually began to disappear because of the manual work was replaced by the machines. The work is no longer a lifetime, losing the work is every day, looking for the new work and a break between the work is prolonged. The human work has been often replaced by machines, as has been done by the expert, now by the machine. That is why we consider it important to keep the diverse work and automation of the production and perceive it critically.

3 Applied ethics and ethical reflection of work

The methods should be created to help increase the ethical sensitivity, identify the ethical conflicts, and then practically help to solve the ethical conflicts in today's global society, in order to survive the good life, which shapes the work as the important part of the human life. The global visions of improving the quality of the life are needed for developing countries⁷. Within contextualism and its application, it is appropriate to develop the concepts of the work, even to the Central European conditions. As it has been pointed out, the work is fading away, the machines are being taken over and the intellectual work prevails. Reflections and concepts of future direction indicate that human labor can replace machines, in the past many tasks that people have taken over today - even in production or in services from the point of view, it is possible that this will happen in the near future. It is therefore necessary to pay attention also to this area, mainly because of the preservation of work as such as an important aspect of human life. The new skills and skills are required, with the human beings wanting to be able to work. Not all of the human beings are looking for the work, in which they are going to accomplish, they just have to earn salary and they realize in their leisure time. At the same time, the intellectual work is not suitable for all of the human beings or their capabilities are not enough to control more and more required

⁷ Minimum and adequate wages are needed to meet their basic needs, ensure adequate working conditions and prevent child labor. <https://sustainabledevelopment.un.org/sdgs>

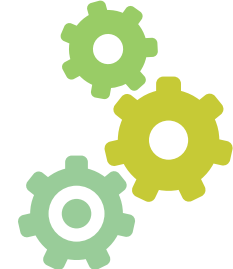
computer technologies. According to us, the work should not disappear, it should be kept as diverse as possible. The sustainable development should also touch on preserving the work, so that it is available to as many human beings as possible, in the adequate conditions. The new technologies, automation and robotics should be used for the riskiest work to make human work less hard, not to replace the human work. Alternatively, let the human beings the possibility to continue working. The social contacts, the human approach, this is what we consider to be important. At the same time, not all of the human beings can adapt to the new changes. The new technologies are mainly designed to reduce the negative impact on the human environment. In Europe, we can see the trend of extending the retirement age, which means that the work will also have to be maintained for the human beings who are no longer able to fully use information technologies, to learn new technologies. The problem, for example is the computer literacy at present. The human beings before the retirement age have trouble controlling it. In the future, it may be the problem to control some other technologies, again for older generations, so it will always be necessary to maintain the work for the older generations as well. The global visions of the sustainability solve the areas of the work, which are not relevant for the European area. The level of working conditions and legislation are at the higher level than in the developing countries. That is why it is necessary to create epistemic communities focused on the work and its future, in terms of the sustainability as well. The idea of the modern, where the science is dominant is failing. As we have pointed out, the work is the important phenomenon in the human being's life and must not be lost in his/ her life, it must be preserved, whether as the source of livelihood or social interaction, as it is necessary to maintain the wide portfolio of the work offers.

In Europe's cultural and historical tradition, work on a relatively high level is both legislative and security. Repeated problem is unhappiness. In the perspective of the future of Industry 4.0, there is a risk that the prospect of work will disappear. We wanted to point out the importance of work as a social phenomenon that affects various areas of life. The future must also be reflected in terms of sustainability and the associated retention of work. Work is not only a source of wages but also social contacts and skills. Therefore, it is necessary to ethically parameterize the work and not to forget its social character. Future generations should also have the opportunity to work and work, develop skills, learn and improve in different areas of practice, not just as machine operators and programmers. Some people prefer social relationships, helping the community. Some people do not have the skills to handle the hard work with the technique, how does Industry 4.0 keep them in mind?

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Eva PECHOČIAKOVÁ SVITAČOVÁ¹

Reversed side of the global economy and its humanization

Abstract

This paper provides a philosophical as well social and scientific reflection of the chosen aspects in globalization focusing mainly on a need for integration, a dimension of responsibility for the sustainable future as well as new formation of a relationship between economy and ethics. A globalisation process forms a new global economic and social environment. However, the development of the global economy and arise of "new freedom" brings the increase in economic and social misbalance aiming towards the accumulation of problems, risks and threats in a global dimension and thus towards global crises. The global economy has led to a disproportionate polarization of wealth and poverty, the production aimed at maximizing profits, and ultimately resulting in a decline in quality of life and its imperilments. A reform of humanism is considered to be a catalyst for negative relations between the economy and society in order to further develop and improve the life of man and society as a whole. Humanizing the economy is a social process which should bring the original and fundamental role to economy - the service of life. It is necessary to restructure the global economy so that it is sustainable, which means that more than the prosperity of the present man will focus on its sustainable existence. The humanization of economy also presupposes the reformulation of freedom, democracy and some other terms in order to relate them to the new globalized social and economic environment. In this context, there is a need for its relevant societal and scientific reflection.

Keywords: globalisation, global economy, new freedom, reversed side, humanization of economy.

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Oblicze globalnego ekonomisty i jego humanizacja

Streczenie

Niniejszy artykuł stanowi filozoficzne, a także społeczne i naukowe odzwierciedlenie wybranych aspektów globalizacji, koncentrując się głównie na potrzebie integracji, wymiarze odpowiedzialności za zrównoważoną przyszłość, a także na nowym kształtowaniu relacji między ekonomią a etyką. Proces globalizacji tworzy nowe globalne środowisko gospodarcze i społeczne. Jednak rozwój gospodarki światowej i powstanie „nowej wolności” powoduje wzrost nierównowagi gospodarczej i społecznej, której celem jest akumulacja problemów, zagrożeń i zagrożeń w wymiarze globalnym, a tym samym w kierunku globalnych kryzysów. Globalna gospodarka doprowadziła do nieproporcjonalnej polaryzacji bogactwa i ubóstwa, produkcji mającej na celu maksymalizację zysków, a w konsekwencji do obniżenia jakości życia i jego naruszeń. Reformę humanizmu uważa się za katalizator negatywnych relacji między gospodarką a społeczeństwem, aby dalej rozwijać i poprawiać życie człowieka i całego społeczeństwa. Humanizacja gospodarki jest procesem społecznym, który powinien przynieść pierwotną i podstawową rolę gospodarce - w służbie życia. Konieczna jest restrukturyzacja gospodarki światowej, aby była ona zrównoważona, co oznacza, że więcej niż dobrobyt obecnego człowieka będzie koncentrował się na jego zrównoważonym istnieniu. Humanizacja gospodarki zakłada także przeformułowanie wolności, demokracji i niektórych innych pojęć, aby odnieść je do nowego zglobalizowanego otoczenia społecznego i gospodarczego. W tym kontekście konieczna jest odpowiednia refleksja społeczna i naukowa.

Słowa kluczowe: globalizacja, gospodarka globalna, nowa wolność, odwrócona strona, humanizacja gospodarki

Introduction

The globalization, which is perceived as a complex process, ranks among the megatrends of the societal development and it is also a fundamental phenomenon in the development of the present world economy. In the nineties of the 20 century the globalization became not only the widely discussed problem but it also began to feature as “the diagnosis of the era representing the supposed historical turning point of the world transformation” [Suša, 2010, p. 19]. The simplified interpretation is becoming very common, this term is not, in particular, embodied thematically in discussions. It is defined exactly neither historically nor by content. The evaluation of fundament and significance of this phenomenon and its interpretation is expressed by two basic meanings – as a chance or as a threat. The

majority of analyses agree on the fact that it is a complex, social phenomenon associated with the array of paradoxes, antagonisms and problems [Suša, 2010].

U. Beck claims that the globalization is definitely the most frequently used, or misused, and the most infrequently defined concept, probably the most uncomprehended and equivocal meaning of the previous as well as the future years. It is evident that the explanation of the core and meaning of globalization has to be manifested in its multidimensionality (ecological, cultural, technical, economic, etc.). However, the centre of all discussions is its economic dimension [Beck, 1999]. In spite of the multidimensionality of globalization, finally the economic basis dominates in this process, which is governed by the principles of the market economy.

One of the first authors, whose ideas of the phenomenon globalization in the social development launched an extensive discussion in the last third of the 20 century, was I. Wallerstein. According to Wallerstein the globalization is the innermost characteristics of capitalism from its beginning and some elements of globalization can be observed even in the period of the emerging new social system. This author deals with the problem of globalization from the different aspects in the majority of his publications [e.g. Wallerstein, 1974; Wallerstein, 2000; Wallerstein, 2006].

Similarly, also W. I. Robinson, who re-evaluates critically some bases, opinions and conclusions of I. Wallersteina [Robinson, 2011], associates the globalization with capitalism and emphasizes that we live in a new global system, in a global capitalism. At the same time he points out the antagonisms of the world capitalism, which are ratcheted up via the globalization and pressed into the organic crisis. He puts more precisely that nowadays we live in a new transnational phasis of the capitalistic system and we are on the move from the world economy to the global economy [Robinson, 2009]. However, its development is shadowed by the human rights abuse, lack of freedom for many people and regions, delimitation of opportunities for some business entities, and at last the deepening of the global problems, risks or accumulation of the crises of the global dimension. The reality doubts the optimistic prognoses, predominantly in the fact that the development of the global economy allows to the majority of the Earth population to meet their needs and ensure a higher quality of life for them. As a result of the processes in the new global environment, which are evaluated positively from the economists' viewpoint, we monitor the unequal development in the particular parts of the world, regions, the deepening of the global problems, risks or threats. It is also the concern of so called "new liberty", which is associated with almost unlimited movement of the production factors, leading to the formation of the single market – "market without borders" – and also the development of the global competition, that is accelerated by the technological and information transfer. One of the fundamental problems, which has been neglected for a long time, or explicated incorrectly – is the absence of moral and ethics in functioning of economy. The "absence" of ethics and moral is related to all subsystems of economy, where those economic entities

are becoming successful which use the principles of the moral hazard, etc. [Ivanová, 2012, p. 66]. Along with the development of the global economy also the polarization of population has been deepened in the world, the poor countries of the global South and the rich countries of the North differentiate more and more with the regard of quality of life. The social models, that function relatively in the countries, face problems and so on. We can agree with the opinion that the enthusiastic declarations about the processes of globalization directed at the final goal - to create people-friendly social and political relationships in the world, which can be achieved only by the launching the completely free market - have many weaknesses [Dubnička, 2007].

The serious reason of problems, which complicate meeting needs of some people on the Earth and do not contribute to the development of culture, and finally threaten the environment, can be considered the reluctance "to be aware and solve the present problems of crisis from the aspect of the introduction of moral and ethical principles into all areas of the societal life and their rigorous exercitation not only during the crisis" [Ivanová, 2012, p.73].

In the paper our objective is not only to point out "the reversed side" of the global economy, where we can find the different inequalities, problems and risks that the population of this planet has to face. At the same time we try to emphasize the necessity of humanization of economy, which is perceived as the societal process eliminating the immoral processes in economy and society and which supports the effective sustainable economic and social development. The goal of economy cannot be "striving for profit" but the target and purpose has to be a man and a society as a whole. In this aspect it is essential to stress the necessity of the socioscientific research which should contribute to reform the global economy in the way so that it can fulfil its principal mission and bring better quality of life to the majority of population.

2. New global economic and social environment

The process of globalization forms the new global economic and social environment which represents qualitatively new level of internacionalization of economic life. In this new global environment the frameworks and rules of a game are being created, in which the whole civilization will exist [Klinec, Pauhofová, Staněk, 2009]. It is qualitatively higher level of society which is associated with the opening of the particular societies towards the world, with the transition to the new quality of social technology of organization, as well as the growth of the economic and social disequilibrium and other problems. Along with the globalization chronicity, the problems emerge which are associated with the existence of the "global culture" in the local contexts. This culture supports the models of behaviour targeted at the consumption and usage, the negative demonstrations of the new life style and formation of "artificial identity" [Garfolo, Huillier, 2014]. The changes in

the new global economic environment occur in both national and world economy. These changes have the character of the principal global restructuring. It is allowed by so called "new liberty" which is the indisputable value, the common factor of many positive changes on the market, but it is also denominated as "reversed liberty". Because of it the wealth polarization emerges in the world, the inequality, problems and risks arise in the new global environment, and last but not least, this liberty is not a real liberty for many people.

2.1 New liberty in global economy – reverse liberty, liberty without borders and limits

We cannot deny that functioning of the global economy is unthinkable without liberty. Just free movement of capital is considered to be the distinctive feature of the global capitalistic system. The freedom of capital brings both the advantages in the present era of globalization and problems and new risks which endanger countries, individuals and nature.

In the global economy we are thinking about so called "new liberty", which arises new questions.

In the relation with the new liberty in the global economy many critics of globalization point out the negative impact of globalization on the human rights as well as further problems in the developing countries. Samir Naim-Ahmed claims that even the apologists of globalization do not deny the fact that in the last decade the human rights are not being respected in some regions. Both apologists and critics of globalization agree on the idea that the human rights are influenced by globalization in the different ways [Naim-Ahmed, 2007]. It confirms that the new liberty is not "liberty for everybody" and it guarantees only seemingly the free exercitation of the human rights for all participants of the global economy. In spite of the fact they have the formal political freedom, "freedom OD", which is indicated as the negative liberty, it does not mean that they are really free [Svitačová, 2013, p. 39].

The negative liberty is the prerequisite for the liberty and it provides a man with the opportunity to achieve the liberty by defining the area, the negative area where a man is not obliged to confess to anybody for his/her activity. The crucial significance of the negative liberty for the positive development of the liberal societies was stressed by I. Berlin at the beginning of the 20 century, who perceived it in the sense of a certain space, where no one is constrained from acting in accordance with his own objectives, and it is the space where other people cannot interfere freely. This liberty is congruent with the guarantee of the private sphere where everybody is "the boss to himself" [Berlin, 1999].

Similarly G. Sartori is thinking about liberty as the "permission" when I am "allowed", which means the prerequisite or permit. Its role is to create the situation of liberty, the

prerequisites for liberty, however at the same time, it does not have to mean real freedom for individuals. It is denoted as the formal liberty or instrumental liberty, and its "principal purpose is to create the situation of liberty, the prerequisite for liberty" [Sartori, 1993, p. 303].

At the first sight, in the global economy the prerequisites are created for liberty. The opportunities for enforcement of economic interests, the increase of economic growth, the rising integration of the international markets and consequently for meeting human needs are being extended in the whole world. Nevertheless, not all people are really free, which means that they can really use freedom. In respect of the different abilities not all people are able to really use freedom, therefore some are less free or unfree. Because it does not exist like this in the global economy, thanks to the "new freedom of movement" the integration and territorilization or repeated class stratification emerge, thus a new sociocultural hierarchy is formed in the whole world. We can illustrate that today so called "mobile elites" or "global elites" are free, which means the groups of inhabitants of the different countries compared with those who stay, although a little bit, helplessly bound with the locality, often remote and without any chance of free choice. They replaced or adopted many laws of the national countries and created a new playing field for companies" [Klinec, Pauhofová, Staněk, 2009, p. 18].

In spite of the fact that the area of freedom is being extended in the present globalized world, the social subjects dispose of only so called freedom "from", i. e. they dispose of the situation of liberty, the conditions for liberty, however, they are not really free.

2.2 New liberty and wealth polarization – origination of inequalities, problems and risks

Thanks to the new liberty the problems and negative phenomena are being cumulated in the globalized world. They represent not only the mass consumption or poverty but also the loss of safety, uncertainty or fear, which are ranked among the dominant problems of the beginning of the 21 century. The globalization connects but also divides, differentiate and polarizes, which means the formation of the different types of inequalities, global problems, risks and threats in the present world.

Despite the fact that the state borders are not an obstacle any longer in the period of globalization, the global participants are not interested in those regions where the problems, poverty or diseases are cumulated. As it is stated, the effort of the powerful is to create one global area, one global market, one policy, etc. Because of the other processes and phenomena, such as poverty, starvation, pandemics, terrorism, religious and civilizing conflicts and so on borders are built and isolated regions appear [Volner, 2012, p. 24]. While the globalization abolished the state borders, now they are being built for the safety reasons, due to the extension of the global social chaos in many regions. Thus, the world

is polarized, a new border is appearing which escalates the isolation and poverty of many regional countries, the borders of which are not clear. The rich countries are interested in these regions for the reason of the cheap labour force, raw materials or other sources of energy and wealth. Therefore, the globalization seems to be a way to a higher production of the world economy, but not the way leading to the improvement of the living standard of majority. In spite of the assumed prosperity the globalization deepened inequalities in the countries and societies [Dubnička, 2007]. The economic disequilibrium was formed, which in present results significantly in the deterioration of the social situation, the rise of many problems and political instability in all parts of the world.

The antagonism "economy – man" is apparent in the unbearable disproportion between the growing production of wealth and its inequal distribution. This antagonism gained the critical dimensions in the relation of the economically developed and developing countries as well as in many economically developed countries. Even more bitter and anti-human aspect in the real economy is that the wealth increase rises thanks to the products demanded by artificially activated needs via advertisement, armament, etc., i.e. based on the resources waste. The second serious antagonism is closely related to the first one. It is the antagonism "economy – nature", which is linked with the increase of use of natural resources, regardless the ecologic costs. "We are losing productive land every day. Mostly it is the result of careless human intervention. The pressure on land leads to soil erosion, waterlogging, salinity, nutrient depletion, lowering of the groundwater table, and soil pollution." [Mravcová, 2016, p. 418-419] The environmental crisis is the evidence that people live irresponsibly at the expense of other people, they do not meet commitments to those people, the commitments to themselves and they do not behave responsibly to the nature. As Kolářský claims, in the present civilization they often cannot fulfil their moral commitments unless they do not devastate the environment. In this relation he denotes the ecological crisis as the moral crisis [Kolářský, 2011]. The author also reckons that the production of surplus production, which is pursued within the limited resources, cannot be effective.

The mass consumption is the most criticized feature of the civilizing processes, predominantly by the environmentalists. It is an expression of the prevailing paradigm of antropocentrism and is associated with an enormous sociocultural burden of the nature. On the other hand, the mass consumption is very important for the development of economy, as it is the inevitable prerequisite for the economic growth. Taking into account the necessity of the continuous expansion of the modern market system, the wealth is being increased also thanks to the products that are demanded by artificially raised needs, e.g. by advertisements, etc., also by the wastage of some resources. Some offered products do not meet the real needs of people and they lead to the formation of the consumer life style and world-culture, the global culture without borders.

The concurrent phenomena of efforts of the economic entities to achieve the economic

prosperity in the new global environment is the expansion of the global and transnational threats, e.g. the pollution of environment, migration, population growth, regional conflicts, terrorism, imperilment of the country safety and others. We cannot doubt about the necessity of the economic growth, however, the essential prerequisite for the development and growth is also the safety, therefore the economic growth requires a certain control. It cannot restrict other forms of growth (e.g. social and cultural) or life.

The above raised questions and problems suggest that the present period of the development of market economy reaches the phases of recession, when the deformations appear. Therefore the necessity of the reformation and humanization is required. The new evolutionary quality should be "humanistic economy", where the human factor becomes partnership dominant and becomes the production factor, i.e. a human – creator, who gave the name to this new period of development of market economy. The efforts to decrease gradually the abysmal differences to the level of deserved differences in incomes and wealth are not based on the forced reallocation processes in the concept of humanistic economy, but they establish this inner principle into the core itself of the market economy functioning [Haluška, 2011].

We can think of the semantic levels of the term humanization. According to O. Richterek the inherent process of humanizing, which is associated traditionally with this term, can be achieved by relatively different attributes depending on the aspects of approach to the essence of humanity, the position of a man in the human society, in the nature and the global world. It is vital to perceive the humanity in much broader dimensions, not only with the view of denomination of a man as "a lord of creation" and "shepherd of existence", on the contrary, a man is considered to be as a part of all living substances which are around us [Richterek, 2001]. Similarly, we can agree with the viewpoint that it is impossible to know a man and the world, to study the global world and economy, the global markets, the quality of life, to pursue the research on animals and people without the human approach [Klimková, 2015].

3. Humanization of economy and necessity of socioscientific research

The global economy raises an array of phenomena which complicate the positive development. We can talk about a global crisis and its deeper causal relations are associated with the antagonisms of civilization. They have the different character, the different forms and they are not related only to the developing countries but all countries and their inhabitants, who nowadays are also confronted with the global risks and threats. They are connected with the functioning of the global economy and emergence of the new global environment. However, they evoke doubts about the principal role of economy, its serving to a man and the share in his development as well as the development of the human society.

The humanization of the global economy is a promise which means the attempt to reform

economy, globalization and social justice [Restakis, 2010]. The humanization of economy is the attempt to reform economy, it studies the ways of which organizations transform lives and communities in the whole world by creation of the models of economic and social development providing fairer and more human future (ibid).

Also G. Karakunnel states that so called new humanism, which represents solidarity, should doubt the absolute statements and practices of the dominant economic system and establish a better world. According to this author we can establish it in the way that the principle of solidarity will become operative at the level of interhuman relationships and at the level of relationships between the financial institutions and people in the globalized world. A. Sen asserts that the new humanism should rely on the real development, represented by the human development. It is related to the economy which "as a human activity, economy is intended to promote human welfare" [Karakunnel, 2005, p. 80]. Thus, the humanization of economy should try to achieve predominantly the human development and rely on the solidarity, which consists in the discovery of the human bondings between the individuals and communities [Karakunnel, 2005].

This requirement is related to the necessity of understanding what is the sense of the economic activity and what is the principal role of economy and the whole economy. To participate in the development and increasing the quality of life of a human and the whole society. The economy should provide the reproduction by its production of the material and some spiritual values and underlie the whole societal development of inhabitants, their social, political and spiritual life. Thus, it co-creates the subsistence conditions of other spheres of life, it influences the social activities and structures to the extent in which the functioning and development of the spheres requires the presence of the economic factor [Svitačová, 2012].

It is undoubtedly necessary to point out the value of liberty also in association with the effort to humanize economy and increase the quality of life in the new global environment. M. Kwiek states that the liberty is the indisputable value, and at the same time it is the common denominator of many positive changes on the market, but also the truth is that it is being redefined in the present globalization process. Similarly, the essential terms from the political philosophy as democracy, market and politics are also redefined. The globalization prefers the neoliberal capitalism and economic rationality to – at least not at the first place – liberty, democratic principles and social values. Kwiek expresses his belief that we will be powerful enough to reformulate our concepts of liberty and democracy so that they will be related to our new globalized political, social and economic environment [Kwiek, 2002].

The humanization of economy also assumes that all people, and especially the social subjects which pursue the economic activities, should take into consideration the other "the reversed side" of the global economy, which reveals the global inequalities, where many problems emerge, and also risks and threats that the population of this planet has

to face. These phenomena accompany the development of the global economy and apparently they do not allow to achieve the quality life for all within the required extent. The economic experts should be aware of it sufficiently, but also all other social subjects which are involved directly or indirectly into the activities in the global economy or which are related to these activities. Only this can be the assumption for the ability to adopt the adequate standpoints to these negative phenomena, to be able to face them, to find the ways for their elimination or at least reduction, and last but not least, to search for the ways to prevent them.

Taking into account the alarming situation in the new global world, where the global economy has the considerable deal, we can agree with the opinion that the humanization should become the catalyzer of the economic changes in the 21st century, but also the changes of functioning of societal image. The process of humanization of economy and society should be the immanent element of the citizens' activities, the key part of the entrepreneurial entities and also the key factor of activities of societies and countries and it should aim at higher quality of life [Ivanová, 2012].

Based on the knowledge and awareness of the situation seriousness in the new globalized environment it is imperative to invigorate not only the moral responsibility of the entrepreneurial entities, but at last the responsibility of all subjects which pursue the activities in the new global environment. It is one of the most important missions for the educational institutions, predominantly for the experts in the area of the social sciences and humanities. After all, as today some economists claim the necessity of the social sciences and socioscientific research is being increased extremely [Staněk, Ivanová, 2015]. In fact, these sciences try to search for the answers to the important questions related to the functioning of society and quality of life of the people living there.

It is convincing that the current applied ethics shifts to questions such as: "How do we create a better world for our offspring? What kind of person should I become? The questions are shifting towards political, existential and moral meanings." [Fobel, Fobelová, 2016, p. 51].

4. Conclusion

We cannot deny that the global economy allows to achieve a higher economic effectiveness, when taking into consideration the utilization of productive factors and a higher qualitative level of the economic growth of goods and services. On the other hand, it is associated with the polarization of wealth in the new global environment, and also with the inequalities, problems, risks or threats, which have the global character and apply to all of us. There emerges the necessity of change. It is fundamental for all of us to understand the reasons why the economy should be humanized, why it should acquire its original function and we should try to make it the functional subsystem of culture.

Nowadays, we can consider "a step forward" what has been stated above, that some economists realize the necessity of the social sciences and socioscientific research. We believe that also the others will admit gradually that the social sciences (e.g. sociology, political science, culturology, etc.) and also the humanities (philosophy, ecophilosophy, history, ethics, etc.) do not have the counter-productive impact towards the economic sciences and trade, which are also ranked among the social sciences. The social sciences and humanities constitute the obstacle neither in the development of the economic sciences nor in the development of the global economy, vice versa. They support the development of the global economy with "a human face", i. e. the economy which serves really to a human, allows him to live a dignified life and progress, at the same time they respect the value of the nature and support the sustainable development. Apart from that, the social sciences can bring some advantages for economics as well as for the global economy. For example, when dealing with the ethics in economy, A. Sen states in his publication the reason why economics should be closer to ethics. It consists in the advantages which arise for economics. He tried to point out that the expected advantages can be significant. [Sen, 2002]. After all, H. Küng also admitted the necessity of a new paradigm of the economic ethics, where the economic rationality will be associated with the basic ethic orientation [Küng, 2000, p. 278]. Its subject is to study the economic activities, if they are guilty towards higher values and goods and if they are integrated with the social and ecological "future" aspect. It admits the efforts of the economic subjects involved to achieve a profit under the condition that the higher values will be untouched and it emphasizes that the ambition to maximize profit is not justifiable in any circumstances.

The current mission of the social sciences is to reformulate again the concept of liberty, democracy and some other, so that they can be related to our new globalized social and economic environment. Those assignments are applicable not only to the social or political philosophy, ethics, political science, international relationships, etc. but also to the economic sciences and trade, which also rank among the social sciences, however, up to the present day some subjects do not realize it sufficiently. Those are the subjects which pursue the economic activities in the new global environment.

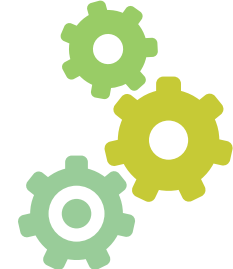
The fundamental, or key element of the development of each society is a human. This aspect is vital also from the viewpoint of the position and role of the economic structures and mechanisms in the present society. The requirement of humanization of the global economy becomes the core of attention in the context of further development of the "global society" and predominantly of the sustainable future. The reverse side of the global economy is getting increasingly darker shades. However, the humanization is not the objective but only the tool, which is permanent, for achieving the results that will allow the dignified existence to everybody. As I. Haluška claims neither ideas, nor searching for the forms and approaches to the democratization of economy, are anything new. The most cardinal requirement is to secure the irrefutability of the processes of democratization and humanization [Haluška, 2011].

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Piotr SIENIAWSKI¹

Migrant crisis and the migration policy of the Slovak Republic in the light of sustainable development

Abstract

The purpose of this article is to examine the migration policy of the Slovak Republic in the light of sustainable development. Particular attention will be paid to the political discourse in the Slovak Republic on the migrant crisis in 2015. It aims to provide an answer to the question how the Slovak political elites reacted to the migrant crisis and briefly outline the consequences on political development. It also characterizes the lawsuit, which Slovakia and Hungary filed at the Court of Justice of the EU, as well as the concept of "flexible solidarity", introduced during the Slovak Presidency in the Council of the EU.

Keywords: migration, migrant crisis, Slovakia, Visegrad Group, sustainable development

Kryzys migracyjny a polityka migracyjna Republiki Słowackiej w świetle zrównoważonego rozwoju

Streszczenie

Niniejszy artykuł podejmuje próbę analizy polityki migracyjnej Republiki Słowackiej w świetle zrównoważonego rozwoju. Szczególna uwaga zostanie poświęcona dyskursowi politycznemu w Republice Słowackiej związanemu z kryzysem migracyjnym w 2015 r. Celem pracy jest udzielenie odpowiedzi na pytanie o to, jak zareagowały słowackie elity polityczne na kryzys migracyjny oraz krótkie przedstawienie jego konsekwencji dla dalszego rozwoju sytuacji politycznej. Artykuł porusza również problematykę pozwu, który Słowacja i Węgry złożyły w Trybunale Sprawiedliwości UE oraz koncepcji „elastycznej solidarności”, przedstawionej podczas słowackiego przewodnictwa w Radzie UE.

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Słowa kluczowe: migracja, kryzys migracyjny, Słowacja, Grupa Wyszehradzka, zrównoważony rozwój

Introduction

Migration in the global context can be defined as "movement of a person either across an international border (international migration), or within a state (internal migration) for more than one year irrespective of the causes, voluntary or involuntary, and the means, regular or irregular, used to migrate" [Migration, 2014, p. 90]. Undoubtedly, it is a phenomenon that may have influence on the security, stability, economy and social policy of a state. In the globalized world, migration as such can hardly be avoided. It very much depends on the policies of the receiving state whether migration will become a source of sustainable development and impetus for a tolerant society, or whether it might become a source of political quarrels and conflicts.

The implementation of planned, safe, orderly and well-managed migration policies was listed among the goals to reduce inequality within and among countries in the 2030 Agenda for Sustainable Development [Transforming our world...], adopted by the UN General Assembly in September 2015, as well as in the Draft of the Global Compact for Safe, Orderly and Regular Migration, finalized in July 2018 by the UNO [Intergovernmental Conference to Adopt...]. The UN member countries have also pledged to promote peaceful and inclusive societies for sustainable development. In the European Union, migration, especially economic migration, is perceived as an opportunity to deal with a shrinking labour force, potential skills shortages and ageing population [Sustainable development in the European Union...]. In this context, it should be noted that Slovakia, as a member country of both the European Union and Council of Europe, has respective obligations in the field of migration and migrants' integration stemming from the legal framework of both aforementioned international organizations.

Three years have passed since the outbreak of the migrant crisis and this is perhaps a good occasion to look back and critically reflect on the political discourse and actions taken. The aim of this article is to analyze the discourse on the migrant crisis in 2015 and afterwards, represented by the most popular politicians at that time. It will also examine the steps taken by the Slovak Republic on the level of the European Union and critically address the migration policy in the light of sustainable development, especially in the field of labor migration.

Migration and asylum policy of the Slovak Republic

Slovakia is a country which has very little experience with immigration, which may be attributed to its historical development. Slovak society was rather closed until 1989, belonging to the former Eastern Bloc, and slowly started to open after the so-called "velvet revolution" and the political transformation period. Since then, the country has been a transit zone for people migrating to Western Europe, but it has very rarely become the final destination for refugees or immigrants.

According to the official statistics, the numbers of residence permits in the Slovak Republic have been increasing recently, with a clear majority of EU citizens compared to third country citizens. Still, according to the International Organization for Migration, Slovakia has the sixth lowest ratio of foreigners within the EU [Migrácia na Slovensku]. In 2015, most illegal border crossings were performed by the citizens of Ukraine (867); followed by Syria (582), Afghanistan (265), Iraq (146) and Kosovo (120).

Table no. 1: Migration to the Slovak Republic – residence permits

Year	2012	2013	2014	2015	2016	2017
EU citizens	41,858	42,858	47,544	49,526	52,015	54,056
Third country citizens	24,333	25,019	29,171	35,621	41,332	50,395

Source: Author's own compilation based on: "Štatistický prehľad legálnej a nelegálnej migrácie v Slovenskej republike", <https://www.minv.sk/?rocenky>, last retrieved 08-10-2018

The right to asylum is guaranteed in Art. 53 of the Constitution of the Slovak Republic, reading: *"The Slovak Republic shall grant asylum to aliens persecuted for the exercise of political rights and freedoms. Such asylum may be denied to those who have acted in contradiction with fundamental human rights and freedoms"* [Constitution of the Slovak Republic]. According to the statistics of the Slovak Ministry of Interior, the numbers of asylum applications have been sinking recently and so have the numbers of asylum granted, except for the year 2016, which may be attributed to the migrant crisis. These numbers are illustrated in the table below.

Table no. 2: Asylum policy of the Slovak Republic

Year	2012	2013	2014	2015	2016	2017
Asylum applications	732	441	331	330	146	166
Asylum granted	32	15	14	8	167	29
Citizenship granted	0	7	12	5	3	6

Source: Author's own compilation based on: "Štatistiky. Azyl a migrácia", <http://www.minv.sk/?statistiky-20>, last retrieved 08-10-2018

The political discourse on migration

The migrant crisis and the discussion about the relocation mechanism had started a huge political discourse in Slovakia shortly before the parliamentary elections, which took place in March 2016. Especially after the terrorist attacks in Paris in November 2015, almost all political parties perceived migration as the alleged cause of terrorism. Most of the political parties started to act as protectors in order to "save the country from Muslim terrorism". This strategy can be illustrated on the example of the former PM Robert Fico, head of the leftist party "SMER – Social Democracy", who stated: *"When I say something now, maybe it will seem strange, but I'm sorry, Islam has no place in Slovakia. I do not wish there were tens of thousands of Muslims"* [Slovakian Prime Minister says...]. The fears of Muslims changing the country's tradition can be illustrated on his following quote: *"And we do not want to change the traditions of the country, which is built on Constantine-Methodist tradition"* [Ibidem].

In fact, the estimated number of Muslims living on the territory of Slovakia is around 5,000. It means Islam does not even meet minimum conditions in order to be registered as religious society. In order to do so, there need to be at least 20,000 registered members claiming to belong to such a society. In January 2017 the Slovak Parliament passed a law that increased this number to 50,000 [Zákon 308/1991 Zb. ...]. In the author's opinion, in the light of the aforementioned facts, its necessity was rather disputable.

Similar rhetoric was represented by MEP Richard Sulík, the leader of the strongest opposition party in the Slovak Parliament, "Freedom and Democracy". In his public speeches, he often blamed the German Chancellor, Angela Merkel, for the refugee crisis in Europe: *"One of the reasons is the open door policy of Angela Merkel who unilaterally and with a stroke of a pen invited unprecedented numbers of migrants in"* [MEP Richard Sulik on Trump...]. As a consequence of the terrorist attacks in France and New Year's Eve sexual assaults in Cologne, Germany, Islam started to be depicted as a security and cultural threat to Slovak society. *"To protect ourselves from a hypothetical threat, we should continue our opposition to accepting migrants. (...) For me, Islam as an ideology is not compatible with our culture. There is no such thing as moderate Islam. What does exist, though, is a moderate Muslim"* [Ibidem].

A completely different approach to the migrant crisis was represented by the Slovak President, Andrej Kiska, whose views were clearly contradictory to the majority of political parties. He urged for more solidarity, stating that Slovakia could provide shelter for even more asylum seekers than had been foreseen by the quotas: *"Nobody with a heart in the right place wants to see such enormous human tragedy, suffering and dying. Neither Europe as a whole, nor Central Europe, including Slovakia, will benefit from making a distinction between the old and new Member States again. A distinction between the West and the East"* [Kiska: Attitude to refugees...]. Moreover, he urged people to show empathy with asylum seekers and thus make a positive impression of Slovakia abroad.

Shortly after Paris terrorist attacks, the Slovak government decided to change the Code of Criminal Procedure as well as Art. 17 of the Constitution, in order to prolong confinement in case of being suspected of terrorism, up to 96 hours: "(3) *A person charged with or suspected of a criminal offence may be detained only in cases provided by law. A detained person must be immediately informed of the grounds thereof, and after interrogation at the latest within 48 hours, **or in the case of criminal offences of terrorism at the latest within 96 hours*** [added part, bold – P.S.], *must be either released or brought before a court*" [Constitution of the Slovak Republic]. It is worth mentioning that since 2005, when the criminal offence of terrorism was introduced into Slovak legal system, only one single person has been convicted of this crime. As a consequence, the atmosphere of fear and populism certainly helped the far right party "Kotleba – People's Party Our Slovakia", which organized marches against the "islamization of Europe" in Slovak cities, reach 8 per cent in the parliamentary elections in March 2016, gaining 14 seats out of 150 in the National Council [The Refugee Crisis and the Reactions...].

Slovakia and the policy of the Visegrad Group

In order to cope with the sudden influx of asylum seekers to Italy and Greece, on 22 September 2015 the Council of the EU adopted a decision that established a temporary relocation mechanism, which was supposed to apply to 120,000 asylum seekers. Slovakia, along with the Czech Republic, Hungary and Romania, voted against this mechanism, but ended up outvoted under the qualified majority rule. Nevertheless, Slovakia persisted in the refusal and agreed to take in only 149 Christian asylum seekers from Iraq in November 2015.

On 2 December 2015, Slovakia filed a lawsuit at the Court of Justice of the EU (hereinafter referred to as CJEU or Court), demanding that the Court rule the decision on imposing mandatory quotas invalid and put the Council of the EU under legal obligation to pay the costs. One day later, the Slovak position was joined by Hungary (Poland intervened in support of the applicants). The lawsuit claimed that the Council of the EU violated the principle of the institutional balance, principle of proportionality (the necessity of the measures in order to achieve the goal), principle of legal certainty as well as principles of representative democracy and sound administration [Zhrnutie žaloby vo veci povinných kvót]. However, it should be noted in this context, that the member states have an obligation to act in such situations in a spirit of solidarity, based on the provisions of the Treaty of Functioning of the EU [Consolidated version of the Treaty...].

On 6 September 2017, the CJEU dismissed the actions brought by Slovakia and Hungary. It confirmed that the decision could be adopted in non-legislative procedure, without the participation of the National Parliaments. The EU institutions were allowed to adopt necessary measures in order to avert the emergency situation caused by the sudden inflow

of persons. The Court also held that the Council was not required to act unanimously when adopting the decision and that the objective of the decision could not have been achieved by a less restrictive measure [Judgment of the Court...].

Migration and sustainable development

During the Slovak Presidency in the Council of the EU, in the second half of 2016, the Visegrad Group came up with a "solution" called "flexible solidarity" which should be the main guiding principle in migration policy. This concept should *"enable member states to decide on specific forms of contribution taking into account their experience and potential. Furthermore, any distribution mechanism should be voluntary"* [Flexible solidarity' becomes...]. To support this concept, Slovakia gave an example of a bilateral project with Austria in the city of Gabčíkovo. Food and accommodation was provided there for 500 Syrian asylum seekers who had applied for refugee status in Austria. Although this project should have served as a positive example of "flexible solidarity", the inhabitants of the city of Gabčíkovo were in fact hostile towards the asylum seekers, even organizing a referendum² on this issue.

The concept of "flexible solidarity" has also been contested with a lot of criticism within the EU for being vague and unclear, ironically compared to "being a little pregnant" [*'Flexible solidarity becomes...'*]. However, in the author's opinion, the most obvious problem regarding the concept of the "flexible solidarity" was that the decision on receiving asylum seekers was supposed to be taken purely at the discretion of the Member States, meaning that there were no specific obligations to receive certain numbers of asylum seekers.

Table no. 3: Statistics on migration of Slovak and foreign citizens (in thousands)

Year	2012	2013	2014	2015	2016	2017
Slovak citizens leaving Slovakia	45.3	46.8	46.5	44.3	35.0	31.2
Slovak citizens returning from abroad	27.3	27.1	29.9	29.9	32.3	30.2
Foreign citizens coming to SR from the EU	7.8	7.3	8.6	10.5	11.9	18.9
Foreign citizens coming to SR outside the EU	1.6	1.6	2.0	3.2	3.5	5.3

Source: Inštitút finančnej politiky, "Host do domu. Analýza príchodov a návratov obyvateľstva na Slovensko", <http://www.finance.gov.sk/Default.aspx?CatID=44>, last retrieved 28-10-2018

It follows from the above table, that despite the numbers of Slovak citizens leaving Slovakia have been decreasing recently, they still exceed the numbers of Slovak citizens returning from abroad. On the other hand, the numbers of foreign citizens both from the EU and from outside the EU have been increasing almost steadily.

² In the referendum, which took place on 2 August 2015, inhabitants of Gabčíkovo were asked the following question: "Are you against the creation of temporary asylum camp in the facility of Slovak Technical University in the village of Gabčíkovo?" [Mesto Gabčíkovo, <http://www.gabcikovo.sk/sk/item/193-referendum.html>, last retrieved 30-10-2018]

In 2011, the Slovak government approved the document "Migration Policy of the Slovak Republic until 2020", which outlined the state policies in the field of migration until 2020. The document emphasized the importance to keep the obligations stemming from the membership of the Slovak Republic in the European Union. Furthermore, it emphasized the importance of regulated economic migration. As of now, there are 3.3 workers for every person of pension age in Slovakia. According to the prognosis of the European Commission, it will be only 1.5 working persons for every pensioner in 2070. Also, life expectancy of men is predicted to grow from current 73.7 to 84.2 years and of women from current 80.7 to 89.1 years [Nezostarneme tak rýchlo...]. The ageing population could potentially mean significant issues in the welfare system. Thus, the conceptualized migration policy, especially legal labor migration in combination with education and re-qualification of asylum seekers without necessary education, may prove beneficial in the long-term perspective.

Conclusion

The migrant crisis in 2015 and the related public discourse have drawn a lot of public attention and shown that migration can no longer be on the periphery of state policy. On the contrary, the state ought to collect data on migration, perform qualitative research and implement policies for orderly and regular migration in accordance with its international commitments to ensure sustainable development, including in the field of migration policy. In order to ensure constructive discourse, it seems inevitable to ensure that citizens have access to objective information on migration.

The reactions of Slovak politicians as well as the reaction of the Slovak government did not fully correspond to the obligations stemming from Slovak membership in international organizations, especially to the policies set by the EU institutions. Later, Slovakia together with Hungary, and supported by Poland, challenged the relocation mechanism adopted by the Council of the EU, before the CJEU. These actions were later dismissed by the Court. The Visegrad Group suggested a model based on "flexible solidarity", which did not foresee any specific commitments.

The development of Slovak society is characterized by an ageing population and the demand for qualified labor force. In this context, a well-planned migration policy and the integration of immigrants into society might prove beneficial for sustainable development in order to balance the demographic changes in the long term.

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