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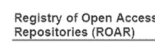
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ALBANIA'S INTER-RELIGIOUS HARMONY AND TOLERANCE: THE CASE OF MALBARDH

Abstract

25 years after the fall of Communism the religious life of Albania has changed dramatically. The full impact of this change with regard to the social cohesion of Albania is yet to be felt, because the first generation living with religious freedom is only now coming of age.

Albania still enjoys a remarkably harmonious religious environment. However, a poor understanding of the underlying reasons for such harmony and the understandable eagerness for exaggerating the apparent inter-religious tolerance of Albanians may induce a sleepy ignorance of weaknesses in the face of the global social and religious currents present. This reality could result in upheavals similar to those experienced in other countries with mixed religious populations.

Therefore, a good understanding of the much discussed case of the village Malbardh, reflecting the typical shape of Albanian inter-religious harmony, will help in distinguishing the characteristics of true inter-religious tolerance. This requires adding pluralistic wisdom to the Malbardhian goodheartedness.

To start this important discussion, I shall present an analysis of the Malbardh case contrasting what I call inter-religious harmony with tolerance. I shall then suggest a way to develop an informed and enduring Albanian religious tolerance.

Objectives: The objective in this paper is helping the understanding of the nature and meaning of the inter-religious environment of the village of Malbardh selected as a good case of the Albanian environment of inter-religious interactions.

Methods: In the context of writing an ethnography the methods included here are interviews and focus groups with participant observation.

Results: Determining the nature of such an environment as harmony and distinguishing it from the designation of inter-religious tolerance is the unique contribution of this work.

Scientific novelty: I consider the clarification of the sense of harmony and tolerance in relation to different entities such as the two differing religions of Christianity and Islam, is a novelty with special application in our understanding of the Albanian environment of Malbardh.

Practical significance: The practical significance of this study is related to the intentional work to be done in preserving what is valuable in the traditions of the Albanians as evident in the village of Malbardh in order to ensure transitioning from harmony toward tolerance.

Keywords: inter-religious tolerance, harmony, case study, pluralism.

1. Introduction: Albanian inter-religious tolerance as illustrated in the case of the village of Malbardh

1.1. The broader context of inter-religious tolerance

Through the media we learn of frequent conflicts and acts of violence throughout the world that are religiously motivated [1, P. 78]. The history of religion is not comforting with regard to inter-religious tolerance. As indicated in a recent review [2, P. 194] quoting several studies [3; 4; 5], more than half of the wars between 1946 and 2001, 115 wars out of 225, happened in one decade between 1989 and 2001. Now that religions have moved even closer to each other in a world that is more interconnected and permeable than ever, inter-religious tolerance is needed all the more and as philosopher Michael Walzer said: “it sustains life itself” [6, P. 30].

In this disturbing context the example of harmony in Albania is very refreshing and possibly important in suggesting ways to foster inter-religious tolerance in our world today. At the same time, now that “Albania has become entwined in global processes,” [7, P. 25] threats for turning this “garden of religious harmony”¹ into another theater of conflict are already at work with the globalizing currents felt among Albanians including reports of hundreds of Albanian Muslims in ISIS ranks.

Albanian inter-religious tolerance is held up as a good example by many including Pope Francis who visited Albania in September 2014, but before we go any further in understanding one sliver of this purported Albanian inter-religious tolerance with the case of the village Malbardh, we need to clarify how representative Malbardh is of the whole of Albania.

1.2. Qualifying the representativeness of Malbardh for this study:

The communist regime shaped Malbardh in a way similar to what one may find in any Albanian village. After a generation of active anti-religious propaganda in a country declared officially atheistic, and characterized by effective indoctrination coupled with harsh punishment for detractors, religion in Malbardh did not fare any better than in any other part of the country. Religion

was reduced to being a very marginal reality. It was felt only in the presence of the church ruins, or in some sense of a person’s traditionally having a Muslim or Christian background, both equally irrelevant as life orientations.

Malbardh’s demographic make up is predominantly traditionally Muslim, that is, more than 900 of about 1000 inhabitants. There is also an indigenous Christian population of about 9 households living side by side the Muslims. This is similar to the general Albanian population mix of Christians and Muslims, although percentages vary in different areas of the country.

2. Research preliminaries: Toward a working definition of inter-religious tolerance

2.1. Tolerance, ideas and persons:

To address more directly the issue of the inter-religious tolerance in Malbardh² we need to start with the question: What is tolerance and when can we say that tolerance obtains?

As it has been pointed out by Newman, there is a distinction between “tolerance” and “toleration” [9, P. 5], but here we shall seek to come up with and use a working definition of tolerance. The main discussion here focuses on distinguishing the important emphasis in tolerating people with differing or opposing ideas rather than tolerating differing or opposing ideas *per se*.

So, what does it mean to tolerate another’s beliefs? This is important to clarify, because there are different perspectives on this issue [1, P. 82]. I would put forward that to tolerate another’s beliefs does not mean that one accepts them as true. As Jay Newman clarifies, “Tolerating a religious belief, then, does not involve a half-hearted acceptance or endurance of the belief *in itself*, but rather it involves acceptance or endurance of *someone’s holding* that belief, that is of a certain case of believing” [9, P. 8].

This definition by Newman is important to grasp, especially with regard to inter-religious tolerance, in order

² I am bypassing here the discussion of observational terms such as ‘coexistence’ or ‘cooperation,’ which are used frequently to describe the Albanian situation of Muslims and Christians, choosing to focus on the more qualitative terms ‘harmony’ and ‘tolerance,’ which focus on the nature of interaction between Albanian Muslims and Christians.

¹ I borrow this phrase from [8].

to avoid the common practice of slipping into the stance of tolerating ideas rather than people. Barua advocates this latter approach in his article “Ideas of Tolerance.”¹ My disagreement with this suggestion is not to say in any way that ideas are not important in the existence of tolerance. On the contrary, my main point in this writing hinges on the importance of ideas in the existence of inter-religious tolerance, but it is people and not ideas that we tolerate.

2.1.1. *The disappointing promise of relativism:*

Relativists who adjust the meaning of tolerance to make it more of a propositional attitude, which considers respecting another’s religious beliefs as being of equal truthfulness to the truth claims of one’s own convictions, open the door for this stance being considered as nonsensical. This is the case because a person could end up holding as equally true both propositions: his own, and at the same time and in the same respect that of the religious other, even if they are obviously contradictory. My concern here is not the important discussion of the concept of truth, but the impact of the relativistic view of truth on tolerance, if it is the view of the religious adherents. It practically dissolves the ground on which tolerance depends and this is a serious deficit in a pluralistic context. It is appropriate in this respect to listen to the concerns of an astute social observer of our time, namely Frank Furedi, who argues that tolerance can become a vice. In his words:

“Tolerance as an act of not interfering or attempting to suppress beliefs that contradict one’s own sentiments has given way to the idea that it also involves not judging other people and their views. So instead of serving as a way of responding to differences of views, tolerance has become a way of not taking them seriously. Arguably, when tolerance is represented as a form of detached indifference or a polite gesture connoting automatic acceptance, it becomes a vice rather than a virtue” [6, P. 31].

We need to detect and expose the relativistic stance because it actually removes the conditions for tolerance to exist. Newman writes: “Tolerance, after all, does not

demand that one believe that every other person’s metaphysical views are as true or as reasonable or as profound as his own. Indeed ... *tolerance is possible only because we are capable of putting up with things that we do not like ... or agree with*” [9, P. 61].

The conditions for tolerance then include: (1) having a certain belief and (2) interacting with another person who holds beliefs with which you disagree. If we didn’t have to put up with those who hold beliefs contrary to ours, there would be no need for tolerance. If all believed the same thing or basically ‘truths’ of the same value, then all religious beliefs are not to be taken seriously. Thus they could be considered merely as different keys on a piano, which may be different but not true or false. What, then, would there be to tolerate [11, P. 75]?

Tolerance can be exercised in different contexts, political, social, religious and personal [11, P. 169–173], and it is important to keep in mind these overlaying contexts in order to ascertain the nature of the tolerance we witness in Malbardh.

2.2. *A working definition of ‘tolerance’:*

From our analysis of the conditions for tolerance, the following may be inferred: For tolerance to obtain there needs to exist (1) *some appreciable level of conviction* with which religious beliefs are held in order to feel the dissonance with the beliefs of another. This implies a perceivable level of awareness of the difference or contradiction of one’s ideas vs. the other’s views.² Also, (2) *some real life context* where two people or groups in interaction can exert some level of restraint or endurance toward the other holding the opposing view or idea. This amounts to (3) *some level of observable respect for the space and freedoms* of religious others to live according to their convictions.

Thus, for tolerance to appear there needs to be some level of personal conviction, interpersonal interaction, and respected personal freedoms³. But the level of freedom is important to ascertain. With regard to the measuring of freedoms, endurance of the other, we can have

² Referring to Boersma () tolerance is perceived ‘as a social concept about which one has to reflect philosophically’ – 2012. [1, P. 83].

³ Referring to Potgieter et al (2014:3) writes that tolerance ‘involves decision-making based on a certain value system, ethical behavior, reasonable argument, difference, as well as a spectrum of behavior’ [1, P. 83].

¹ Here it is written: “To tolerate X, which may be an idea or activity, is to voluntarily exercise some form of self-restraint towards X which we otherwise object to or believe to be deviant” [10, P. 74].

a spectrum of strength achieving (1) refraining from hindering the other unjustly to *declare* freely whatever view one choses to hold and (2) to *propagate* his idea for the consideration of others. It also includes (3) refraining from hindering unjustly the free *conversion* of anyone to the other's idea¹. This is in agreement with Furedi who writes: "... tolerance can be measured in relation to the extent to which people's belief and ehavior is not subject to institutional and political interference and restraint" [6, P. 31].

Now we may put forward a working definition of robust inter-religious tolerance: Tolerance exists between two people or groups when intentionally or knowingly one respects the other who holds and practices opposing views to the point of having both parties endure, without unjust hindrance, even the free conversion of anyone to the other's point of view.

Granted this working definition of tolerance, we can move on to reflect on what is considered to be an example of Albanian inter-religious tolerance: the case of Malbardh.

3. Research descriptions: Understanding the case of Malbardh regarding inter-religious tolerance

3.1. Questions arising about the Albanian inter-religious tolerance in Malbardh:

From my visits to the village of Malbardh, several questions arose in mind about the nature of inter-religious tolerance I studied there: (1) One villager expressed the view, common to many Albanians, that religions are actually nothing more than political parties. What are we to think of this reduction of religions to human creations (Interview with L.A, Sept. 29, 2015)? (2) How does our analysis of inter-religious tolerance fit with the view in this village that a reason for religious harmony there is the absence of foreigners (Interviews and focus groups in the Spring and Fall of 2015)? (3) What is signified by the fact that the greatest distinction the villagers are aware of with regard to their inherited religions has to do with who eats pork and who doesn't? More correctly who is

supposed to, because as they told me jokingly: "the price of pork has risen due to the Muslims consuming of pork" (Malbardh focus group in April 2015).

3.2. The case of Malbardh as an ethnographic study:

3.2.1. Malbardh, the media's take on the story and methodology:

We are interested in Malbardh because of a televised story, aired in February 2014 [13]. It portrayed the alleged tolerance between the Muslim majority and the Catholic inhabitants as being expressed through the participation of Muslims in the building of the church in their village.

The history of the building of the church can be told in different ways. The way it was told by Marin Mema through the aforementioned TV documentary captured the attention of many and set the stage for the discussion of Malbardh's inter-religious tolerance. The point of this TV presentation is that religious tolerance between Christians and Muslims in the village is expressed unmistakably in the building of a Catholic church with the enthusiastic participation of the Muslim majority population in the village.

In September 2014, Henry Jardine, as a representative of the American Embassy in Tirana, gave the village of Malbardh the award "Act Now" in recognition of "Their inter-religious cooperation and the voluntary initiative to build an all-inclusive place of worship" moreover, the journalist Marin Mema, received a prize for this documentary in December 2014 as "Journalist of the year" [14].

Another way the story was told by another journalist, Kastriot Marku [14], included bringing in the details of financial arrangements, which revealed the underbelly of the at first glamorously painted picture of the documentary. The import of this other presentation is that the building of the church was not done by the voluntary work of the Muslim villagers, but by paid work of these villagers financed by the Catholic Church in the region. While this article brings a welcome balancing of facts, its author also did insist on the wonderfully harmonious relationship between Muslims and Catholics in the village so the substance of the story being the admirable harmony of the people of Malbardh still stands.

¹ Here is a good discussion of the meaning of religious freedom indicating the legitimate limitations in light of other human rights and pointing out illegitimate ones while emphasizing "a famous ruling by the European Court of Human Rights (ECHR) dated May 25, 1993,... [saying] 'The freedom of thought, conscience and religion is one of the foundations of a democratic society'" [12, P. 72–75].

Others, like Marenglen Rexha, who is one of the villagers from Malbardh, discussed the nature of the harmony between the Muslims and the Catholics in the village with the provocative title “Our Harmony is not Religious” [15]. This piece offers insights for questions to ask in order to understand the dimensions of the obvious harmony between the villagers of different religious backgrounds in Malbardh, a harmony accepted broadly by others who discussed the case of this village as well [16].

In the following, I shall attempt to provide a better understanding of the main issue of the story: the make up of the inter-religious tolerance purported to exist in Malbardh in connection with the building of the church there and the resulting developments¹.

3.2.2. *Removing the superficial clutter in the discussion of Malbardh:*

The members of a poor village, such as Malbardh, cannot be expected to give more than they did. Therefore the discussion should not be framed by an analysis of financial statements which, admittedly, show the undeniably important role of the leaders of the Catholic Church in the region. More relevant in this context is the respectful and even reticent attitude of those Catholic leaders, who were convinced by the efforts of the religiously mixed group of representatives of Malbardh who instigated the project, to invest in building this church in such a predominantly Muslim village. The Catholic leaders recognized that they were receiving a sincere and unanimous request of the villagers through their representatives, without any known reservations by the whole village, to have the church built (Interview with M.Gj. in April 2015).

The building of the church is significant with regard to understanding the reality of inter-religious harmony in this village. However, how it relates to their understanding of God and religion is more important. To enter this inner world of thoughts and ideas one must over-

come several barriers connected with their immediate struggles and life concerns in a poor village. The fact that the villagers needed to have the road paved did not overcome the truth of their sincere respect of what the church signifies and genuine desire to have the church built to facilitate their pilgrimages and candle lighting.² Such inter-religious attitudes on the part of the villagers would become clear to any sincere observer who interacted with them³.

3.2.3. *Describing some relevant elements for understanding Malbardh's inter-religious harmony:*

Malbardh's harmony is familial or natural.

The villagers I interviewed and talked with in other contexts emphasized the fact that they would involve their fellow villagers of either religion in celebrations of weddings and in their funerals, not simply as participants but with significant functional roles. One needs to appreciate the importance of such celebrations among Albanians to appreciate the significance they attach to such roles. But it suffices for our purposes here to say that such roles meant they relied on people of other religious persuasion in their village just as they would rely on their own family members for the successful management of important social functions. The formal interfamily bonds akin to alliances of close kinship called “Kumbari” between Muslims and Christians were also examples of this long-standing harmony that I noticed.

The more telling statement, which was not intentionally presented as a reason to believe the existence of their harmony but which was said in other contexts of the conversation, was their statement: “we have no foreigners in our village.” This meant that anybody who was not a descendant of the original inhabitants of their village was a foreigner. There is no doubt in their minds, and no reason to challenge their conviction, that they are all

¹ In order to find what the fuller picture was I spoke numerous times and did several interviews with one friend from that village. In addition, I went to the village in the spring and autumn of 2015 where I met with more than 30 individuals at different times, spending full days in conversation, interviewing and conducting two focus groups, eating and socializing with them, and participating in the celebrations at the occasion of the church's namesake day, the day of Shen Mehilli on September 29, 2015.

² My awareness of such issues from my discussions with a friend from this village helped in avoiding some sensitive topics that would sidetrack the conversation. My goal was to get to their religious reasoning and posture. I did genuinely care for their needs and made allowance for their mixed motives in their words and actions toward me, an outsider, even though I came as a friend of their co-villager.

³ I went into this analysis with the confidence that being an Albanian myself I would be able to see through everything but my villager friend's help with the background information and correction of some of my takes on the conversations was invaluable.

descendants of two families that came to that place from further up the mountain about 200 years ago, namely, the Smaci and Buzebolla families. This self-understanding as living without foreigners shows their perception of their fellow villagers as indistinguishably equal partners of the community without any reference to religion¹.

A Catholic man in the group said that his mother used to keep a whole set of separate plates and utensils for their Muslim guests, who might be concerned about touching pork, simply to show consideration and respect for their guests. In the same conversation a Muslim villager jokingly said that “the price of pork now has increased and the Catholics are mad with us Muslims because we are eating it too.” We laughed together as one, as Albanians, though we were Muslims, Catholics and Protestants in that conversation.

The building of the church was building the village’s church.

One reason mentioned in my presence as an argument given by the village representatives in their request for the building of the church was the fact of visits by every family of the village to the ruins of the church for lighting candles at least yearly or whenever the need was felt (Interview with M.Gj. in April 2015).

During my participation in the celebration I was not prepared for a very unique greeting I had never heard before: “t’nimofte,” which means, “May it help you.” The villagers said this to each other as they came across each other coming and going in the vicinity of the church but not outside of that area. My friend told me later that it meant ‘may the church help you’ or may this sacred place

¹ Very interestingly, my interlocutors in the village did not even consider it important to mention the religious change from Catholics to Muslims. Explaining to me in much detail how they exchanged land related to a previous church they belonged to, the Shen e Premte church, before coming to Malbardh for land in the area around Shen Mehill church in their current village, shows how they still keep alive the memory of their church affiliation. This is so even though, as my friend from the village clarified the chronology for me, they had become Muslim by the time they arrived in this village. My friend also said that this conversation helped him to understand why his village celebrates faithfully every 25th of July the day of the “Shen e Premte” church, which is not in their village.

help you. Truly, the villagers seem to have built a place where they came, even when it was a ruin, to bring their concerns and needs for some miraculous help via this sacred place. In this context what the representative of the American Embassy gave in 2014 as a description for the prize for this village’s participation in building the church seems observationally correct, namely a ‘place of all-inclusive worship’²; a place where Muslims and Catholics come for worship on their own without distinctions³.

Harmony without reference to any specific religious teaching.

The existence of the harmony in Malbardh is easy to see, but the motivation for this harmony is important to understand. In this context, the response I received by one old villager in answer to the question “what is religion” is significant because it is very common: “religions are like political parties” (Interview with L.A on Sept.29, 2015).

Another older friend of this 76 year old man, who was one year short of 90 years old, answered my direct question about what a villager would understand of the religion in his village to which he does not adhere. In answering this question he gave me a long and complicated speech mentioning Martin Luther and concluding with “the builders of the mosque have spent the money in vain,” referring to the new mosque built that summer.⁴ Voting with his feet, even though a Muslim by tradition, he was also expressly saying that the villagers didn’t care about the labels of Muslim and Catholic, but knew that if there was a place to go for help from God this sacred ancient place, Shen Mehilli church, was it. Fitting his answer to my question then, he basically was saying that the villagers don’t care about the content of

² Motivation of award “Act Now” given to the village by the American Embassy [14].

³ [13] In one comment from this TV program it was said “... we don’t specify that it is a church only for Catholics, but it is a general church, for Catholics and Muslims together”, says one of the villagers Muharrem Capani.

⁴ In analyzing this difficult answer with my villager friend afterwards in order to decode the different tracks he was running on and see through the intention to show off his extensive reading, we came to the simple conclusion that he, though traditionally a Muslim, was saying that he like others would rather come up the mountain on foot as he already had done that day and hang out in the church vicinity, considered a sacred place, rather than go to the Mosque, which was literally around the corner from his house.

their religions; and thus, even if they know the stories or respective religious symbols, these don't mean much to them. They all believe that this sacred place of the church is important for spiritual concerns, and they go there without bothering to evaluate what one's religion is supposed to say about this practice. They do not suspect there exists a contradiction in a Muslim going to a church for help from above.

If there is one specific religious belief that the villagers can distinguish as of some importance to distinguish between the two religions in the village, then it is pork consumption, which, as we said earlier, is the butt of jokes already.

3.2.4 *The media publicity and the future of harmony in the village*¹

The impact of the media attention has produced a long lasting influence on the life of the village, because it is easy to connect it with the building of a new mosque during a few weeks in the summer of 2015. I could see a very tangible indication of what I suspected to be happening in Malbardh as the result of media attention when I saw the mosque's foundation that spring. In that same April conversation the mayor let slip that somebody from outside Albania had called him and asked if they wanted to build a mosque "now they had the Church." He was offered help with the funding, which he had naturally accepted (Focus group in April 2015).

According to one villager I have spoken to personally, another thing that also has happened for the first time this summer is the coming of a Muslim leader to perform a Muslim religious ceremony for the death on a

young man of the village. Being in his 30's, he had never seen a Muslim cleric do a funeral in his village before this summer, which is also after the media publicity and after the mosque was being built (Interview with M. R. Sept. 2015).

Now that the mosque is built, and the Muslim call to the prayer ritual is heard every day through the amplification of a recording, a new reality has dawned, one where the distinction of the invisible religious divide between Muslims and Catholics is emphasized visibly and audibly every day. This was not the case only a few months ago, before the news of the church building was publicized and going back at least two generations. I consider this new reality to be precipitated significantly by the publicity of the case.

I asked the elders of the village directly how they think they will protect their inter-religious harmony now that the distinctions are set to be developed between the two poles of Albanian religiosity, especially in light of the new mosque that was not there for generations. Their answer was spontaneous, and obviously not pre-considered. It amounted simply to a declaration that the forms of life in this village will not change at least as long as they are alive but no one can predict the future.² It was obvious that they perceived the possibility of change, but it had to be far away and after they died.

4. **Research results: Arriving at a conclusion with regard to tolerance and harmony in Malbardh**

4.1. *Inter-religious harmony or inter-religious tolerance?*

We defined tolerance as obtaining "... when intentionally or knowingly one respects the other who holds and practices opposing views to the point of having both parties endure, without unjust hindrance, even the free conversion of anyone to the other's point of view." I need to clarify here the difference I see between 'harmony' and 'tolerance' as they apply to the situation in Malbardh. The reason I accept, with reservations, calling the obvi-

¹ When I visited the village during the celebration of the patron saint of the church, the Mayor of the village, a Muslim, took me to the stand close by the entrance of the church where one of his friends, another Muslim, offered me a Martini to raise a toast. He then apologetically said that the celebration this year didn't include music and other entertaining events because of some deaths in the village during the summer. All around there were groups of people grilling meat and socializing around food, obviously enjoying the day. I knew that the previous year, 2014, was a bigger celebration because they got the prize for their inter-religious harmony, and in relation to that I understood why the Mayor was apologetic. The media had set a glamorous standard, which they somehow felt was lacking this year and they were apologetic.

² In this connection I am reminded of a very astute insight of Os Guinness with regard to the important difference between USA and Europe with its "tradition and close-knit living situations" as a factor in preserving society facing change. This is in line with the basis for the hope of these villagers to preserve their inter-religious harmony in their village through fostering naturally their traditional way of life [17, P. 133].

ous harmony of villagers of Malbardh inter-religious harmony is that it is the harmony between people whom we have to call Muslim or Catholic based on the perceived different traditional religious background. My reason for using the term 'inter-religious' is strictly sociological and descriptive¹. I have reservations because of the unqualified assumptions carried with the term 'religious' in that phrase. The language of harmony when talking about different religions is misleading if religions are correctly understood as represented according to their historic and publicly available scriptural profiles. Religions by nature, at least the two religions represented in Albania, Islam and Christianity, are mutually exclusive and therefore there cannot be real harmony between them or between people who do justice to these two religions². The proper word for the desirable interaction possible between these two religions is tolerance.

4.1.1. *Harmony as a team's play vs. tolerance as endurance of competition:*

There is a sense in which harmony is a higher development than tolerance, and there is another sense in which harmony and tolerance relate to two different kinds of possibilities. In order to illustrate this important second sense of the relationship of 'harmony' and 'tolerance,' it seems helpful to understand the difference between the environment of a team effort to which 'harmony' is the appropriate optimal result, and the environment of a competition between teams to which 'tolerance' is the desired result required, usually called 'good sportsmanship.'

Tolerance is more like giving the other team the op-

portunity to play against our team according to rules of equal respect. This requires enduring, according to the rules of good sportsmanship, the other's moves to outdo one's own team without interfering unjustly in a field of acceptable competition of goals.

4.1.2. *Do Malbardhians intentionally or knowingly endure others?*

A Catholic together with a Muslim was part of the delegation from the village that went to the regional Catholic leadership to ask for funding of the village church building in the early 2000's. During a meal with a few villagers, this Catholic man told me that the Muslim representative approached him in 2014 to ask him to go back to the Catholic leaders and now ask them to provide money for the building of a mosque.

The Catholic villager pointed out the ridiculousness of that request in the presence of two other villagers there with us who are Muslims. "How could Catholics build the place of worship of a religion they don't agree with?" His point was clear without these words, but not much was said in the awkward situation created as we pondered the significance of the Muslim's request.

It seems that the Malbardh Muslim representative is not aware or does not care of the significance of the difference of beliefs between Islam and Christianity, while also assuming that at least the Catholics of his village and their leaders should think the same as he does. A likely interpretation is that the Muslim representative didn't suspect his request as strange not because he is not smart but because he assumed religions are simply different labels for the same reality, much like the work in each other's harvest.

Making sense of the above-mentioned request by a Malbardhian Muslim representative, beside the descriptions offered above and other comments available even in the TV program aired nationally, indicates that our Malbardh Muslims were not really building the church as Muslims. Malbardh Muslims didn't act as Muslims *per se* but as members of the same community who go to be helped in the same way, in the same place, the church, perceived by them as "an all-inclusive place of worship"³.

¹ The very loose way the term "Muslim identity" is used here can only be justified as a label to identify people in a region by a name but it is very problematic if one assumes the name 'Muslim' to mean more than a label. Of all the cases at least this is definitely true if one uses the label 'Muslim' for Albanians of post Communist Malbardh until today [18, P. 242].

² The term "mutually exclusive" here refers to Christianity and Islam's opposing views about important aspects of reality both in the theoretical realm and as the prescribed goals of such religions in important areas of life for their adherents. For example, the deity of Jesus Christ is foundational to Christianity while this is definitely opposed by Islam. And important goals of Christians, such as their worldwide witness to their faith, is opposed by the goal of Muslims, who are involved in making Islam supreme over all religions in the whole world. So these specific views and goals make it impossible for these two religions to be in harmony as defined in this writing.

³ One villager told me "I would see frequently everyone from the village walk by my house going to the church ruins to light candles so it was obvious everyone would like the church rebuilt."

Comparing this conclusion with the requirements for obtaining tolerance, namely the awareness of the differences, this condition for tolerance is missing in Malbardh. Thus Malbardh Muslims did not show tolerance in building the church but goodhearted village harmony as if working in each other's fields to the benefit of everyone.

Does the comment of the old man of Malbardh about religions being like political parties fit this condition of tolerance, namely that there are different goals consciously held? The context of this comment being the question "what is religion" should help to see that this comment is an expression of understanding religion as parties of different but irrelevant ideas. This explanation fits better with the well-meaning request of the Muslim for the Catholic Church to build the mosque, reflecting a relativizing of contradictory religious beliefs. As previously stated, this relativizing stance inherently undermines the ground for true religious tolerance.

From my interaction in the village, ending the day in conversation with an almost 90 year old man, I got the clear impression that the vast majority of the villagers would not be able to identify any more important belief differentiating Christians from Muslims than whether one should eat pork or not. This is at least one belief that is identified as differentiating and some sacrificing is required for the sake of this belief, indicating some level of conviction¹. In light of the comment about the price of pork rising due to Muslim's consumption, we should infer that the level of commitment is low to non-existent. Neither Muslims nor Catholics are stigmatized with regard to eating pork or not and are endured relatively easily, more easily than in the past generation before Communism, when the mother of the Catholic villager kept separate utensils for Muslim visitors.

With a low level of conviction we have a low level of effort to endure or show tolerance. One could say there is no serious occasion for tolerance. So there is a good relationship of Albanians of different religious labels around the table, but in the absence of real convictions associated

with those labels this conviviality is not an expression of tolerance but simple familial harmony.

4.1.3. *What do the cases of conversion in Malbardh mean?*

The last aspect to look at for signs of tolerance is as we defined earlier "... the measuring of 'freedom,' endurance of the other in (1) refraining from hindering the other unjustly to *declare* freely whatever view one choses to hold, (2) to *propagate* his idea for the consideration of others and (3) refraining from hindering unjustly the free *conversion* of anyone to the other's idea." The fact that I met with at least three Malbardhians, all around 30 years old, who are converts to Christianity from Islam, without any signs of ostracism is very significant.

Conversion is absolutely a litmus test of the existence and the level of tolerance in any inter-religious community because, at least on the part of the converted, we can assume some level of commitment to specific religious ideas at variance with those of one's family of origin. These bring up in the closest circle of the family the issue of belonging. But what I have heard in Malbardh in this regard has more to do with "how it will be perceived by others" outside of the family, and how it would affect the continuation of the family's desired and foreseen material flourishing, rather than a strictly religious objection and enduring or objecting for religious reasons².

Hence, in the case of conversions I would grant that in Malbardh there is toleration in a small scale at the level of family; but it is hard to consider this an example of inter-religious tolerance as would be the case if different 'teams' of religious believers in the village were enduring each other while they propagated their views openly yet respectfully. This just is not yet the reality in Malbardh.

4.2. *Conclusion on tolerance in Malbardh is harmony:*

It should be clear now that Malbardh is a wonderful case of harmony between compatriots of different religious traditions. The villagers of Malbardh manifest admirable

¹ Somebody may point to some cases of fasting during Ramadan, but as my friend from the village told me, the same person while fasting goes and lights candles at the church indicating a freely personalized way of dealing with contradictory things without taking them to mean what a religiously educated person might understand their meaning to be.

² From the conversation with M.R., one of the converted villagers I extensively interviewed, I learned that his family was more concerned that he was losing time to religion, which is perceived as a worthless pursuit, more than anything else. I saw him interacting with his immediate and extended family as well as the broader community without any sign of avoidance or displeasure.

harmony and inclusion of those with other religious labels. While this reality is peaceful and harmonious, by indicating a low level of commitment to specific religious ideas and low level of endurance for purely religious reasons, Malbardh doesn't fit a strict case of inter-religious tolerance but of inter-religious harmony as explained earlier.

My conclusion is that this Malbardhian harmony of goodheartedness will be tested now that the realities of religious pluralism with church and mosque present include not only indigenous cultivation of different religious ideas but also easy transplanting of foreign ideas¹. Therefore, I hope that pluralistic wisdom with its learned criteria for a well-informed tolerance will be added to ensure that the existing harmony of Malbardh will transition into no less than true inter-religious tolerance.

5. Conclusion and Significance: The significance of Malbardhian harmony for Albanian inter-religious tolerance

In Albania now, after Communism, we have the first generation raised in a religiously fertile environment coming of age as 20–35 year olds and determining the future of our country including its religious environment². Tolerance is not a given, on the contrary, with the growth of the awareness of the different beliefs held by religious others, intolerance is naturally more likely. In other words we need to be fostering a culture of tolerance as Furedi also implies: “tolerance is also a social/cultural accomplishment. A tolerant society is one where tolerance as a cultural orientation discourages and restrains social intolerance” [6, P. 31].

Based on the study of the Malbardh case I envision a few tolerance-building steps: (1) Intentionally cultivate the culture of democracy³ both politically and socially as a nonnegotiable good for Albanian society⁴.

More specifically (2) there is a great need for ap-

proaching the study of religion by Albanians as world-and-life-views, paying attention to their truth claims and not simply or primarily studying religions as ‘traditions.’ This is important for the development of tolerance in Albania, as it has been proven to be for the civilized world. As Paul Johnson is quoted as saying, “the pursuit of truth in freedom is the essence of civilization”⁵.

This brings us at (3) the importance of preserving the freedom of conversion of anyone to anyone's religion or point of view without coercion or manipulation in the context of respect for human rights as enshrined in International Law. It may seem unnecessary to say but even in talking about the culture wars in America one author writes that “the agreement that contending factions will not kill each other over their differences... Is no small accomplishment...” [22, P. 319].

Attending a conference on religious tolerance recently, I put the question of conversion to two panels made of representatives of different religions; one international panel including high Muslim representatives from Iran and Egypt, and the other an Albanian panel [23]. The Albanian panel, made of the high representatives of the different religions in Albania including Islam, unanimously affirmed the freedom of conversion while the international one didn't. I am very optimistic that Albania will successfully move from the current stage of harmony into the more religiously mature one of inter-religious tolerance. How this can be accomplished is beyond the scope of this paper but I suspect that the basis will be a deep awareness of belonging first and foremost to a common family and being committed to the values of freedom, democracy and respect for international law as exemplified by the European civilization which Albanians overwhelmingly consider as their chosen destiny.

Mother Teresa spoke in a Bektashi event in March 1991 in the hearing of all of the Albanian representatives of different religions saying: “I will pray for you, for unity and that we live together in peace and joy” [24, P. 540]. I hope the prayer of our Albanian saint will bear fruit as long as there are Albanians on earth.

¹ The ease of dissemination of intolerance today through internet is evidenced here: “... one of the principal ways in which evidence of religious intolerant behavior gets distributed around the globe, is that of video material” [1, P. 78].

² The current mayor of the Capital city, Tirana, is a bright 35-year-old man.

³ Tolerance is considered here as the most important democratic value [19, P. 49].

⁴ It is important to remember that: “... a community suitable for free individuals... is what we call civilization” [20, P. 9–10].

⁵ quoting Paul Johnson, *Enemies of Society*, – Pg. 145. [21, P. 331].

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DOI: <http://dx.doi.org/10.20534/AJH-17-5.6-15-24>A. O. Voitovich¹¹ *Lviv branch of Kyiv National University of Culture and Arts, Lviv, Ukraine*

SUBJECTIVE ASSESSMENT OF THE SOUND OF ORCHESTRAS (ON THE EXAMPLE OF THE CONCERT HALL OF THE LVIV PHILHARMONIC NAMED AFTER S. LYUDKEVICH)

Abstract

Objective: subjective assessment of the sound of orchestras in the concert hall of the Lviv Philharmonic.

Methods: analytical, empirical, observation, comparative, theoretical cognition, analysis and synthesis, and the method of interviews.

Results: based on the analysis of scientific literature on the method of subjective evaluation of the acoustic properties of concert halls, evaluation criteria were established and a questionnaire was developed to interview research participants. Subsequently, subjective evaluation was confirmed by objective acoustic parameters and correlations were established between them.

Scientific novelty: in an article for the first time carried out the assessment of sound of orchestras in the concert hall of the Lviv Philharmonic by scientific studies of the phenomenon of the subjective perception of the musical material.

Practical significance: the main provisions and conclusions of the article can be used in scientific and practical activities in determining the acoustic properties of concert halls, as well as their correction.

Keywords: Subjective assessment, objective parameters, subjective criteria, concert hall, orchestra, questionnaire.

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СУБЪЕКТИВНАЯ ОЦЕНКА ЗВУЧАНИЯ ОРКЕСТРОВ (НА ПРИМЕРЕ КОНЦЕРТНОГО ЗАЛА ЛЬВОВСКОЙ ФИЛАРМОНИИ ИМ. С. ЛЮДКЕВИЧА)

Аннотация

Цель: субъективная оценка звучания оркестров в концертном зале Львовской филармонии.

Методы: аналитический, эмпирический, наблюдения, компаративный, теоретического познания, анализа и синтеза, а также метод интервью.

Результаты: на основе анализа научной литературы по методике субъективной оценки акустических свойств концертных залов были установлены критерии оценки и разработана анкета для опроса участников исследований. В последствии субъективная оценка была подтверждена объективными акустическими параметрами и установлены корреляции между ними.

Научная новизна: в статье впервые осуществлена оценка звучания оркестров в концертном зале Львовской филармонии путем научного исследования явления субъективного восприятия музыкального материала.

Практическая значимость: основные положения и выводы статьи могут быть использованы в научной и практической деятельности при определении акустических свойств концертных залов, а также их коррекции.

Ключевые слова: субъективная оценка; объективные параметры; субъективные критерии; концертный зал; оркестр; анкета.

Введение

Акустические свойства замкнутых помещений, в частности концертных залов, характеризуются объективными акустическими параметрами. Акустические характеристики непосредственно зависят от размера и формы помещения, его абсорбции, материалов стен, потолка и сцены, типа стульев и тому подобное. Также они зависят от наличия колонн, ниш, лоджий, статуй на верхних боковых стенах и мелкомасштабного орнамента на боковых стенах и потолке. Объективные акустические параметры включают RT, EDT, C_{80} , D, G, IACC, BR, Br, LF, Ts, ITDG, ST (sp) [2, 5, 6, 7, 8].

Но, как показывают исследования, одних объективных акустических параметров недостаточно для характеристики акустических свойств концертных залов, поэтому для полной характеристики акустики учеными исследователями были предложены еще и методы субъективного оценивания. В частности, эта проблема рассматривается в статьях Л. Беранека, М. Барона, Т. Хайдака [3; 4; 9; 11; 21].

1. Описание зала

Концертный зал им. С. Людкевича Львовской областной филармонии находится в прекрасном сецесийном здании, построенном в 1907 г. для музыкального общества Галиции. Оркестр филармонии был основан 1933 г.

Потолок: закругленная форма на краях; 2 см штукатурки; по обе стороны и рядом с люстрами мелко-масштабный орнамент. **Боковые стены:** 2 см штукатурки. **Задняя стена** имеет три двери, по ее углам расположены две лоджии. **Пол:** деревянные доски на лагах. Напольное покрытие — ламинат. **Ковры:** на основных проходах. Ковровое покрытие синтетическое средней ворсистости. **Сцена:** на боковых стенах 2 см штукатурки; позади — декорации с органных труб и колонны отделаны скульптурами. **Сценический пол:** деревянные доски. **Зрительские кресла:** спинки сидения мягкие, обитые мягкой тканью; подлокотники жесткие. Концертный зал филармонии имеет балкон. Сцена поднята относительно уровня партера

на высоту 1,5 м. Зал имеет форму прямоугольника с закругленными углами (геометрические размеры представлены в таблице 1).

Таблица 1. – Архитектурные особенности исследуемого зала

L (м)	Вм)	Н (м)	L (м)	Н (м)	S (м ²)	S (м ²)	V (м ³)	V (м ³)	N
Партер	Партер	Партер	Сцена	Сцена	Сцена	Сцена	Партер	Сцена	Кол. мест
16,1	15,5	9,5	9,1	8	248,8	140,7	2355,7	1126,9	576

Источник: техническая документация на концертный зал.



Рисунок 1. Концертный зал Львовской филармонии им. С. Людкевича

2. Методика субъективного оценивания

2.1 Участники исследования

Исследование звучания оркестров проводилось путем посещения живых концертов. В опросе приняли участие около 150 респондентов. Среди них: эксперты по акустике, звукорежиссеры, композиторы, дирижеры, музыканты, музыкальные критики, регулярные посетители филармонии [3, 16]. Ими были заполнены 80 (53%) анкет. Остальное количество участников составили любители симфонической музыки непрофессионалы. С ними были проведены собеседования.

2.2 Дизайн анкеты

Субъективная оценка звучания оркестра проводилась по следующим критериям: пространственность, пространственная перспектива; ширина; тембр; чистота, прозрачность, разборчивость, ясность, четкость; громкость, динамический диапазон; близость, присутствие; текстура; звуковой баланс; поддержка, взаимодействие (музыканты оркестра); шумовые помехи; общее впечатление.

В результате обобщения предыдущего опыта [4; 15; 16; 17] и учета современных требований нами была разработана следующая анкета для оценки «живого» звучания оркестров в концертных залах (образец анкеты показано в таблице 2).

Таблица 2. – Образец анкеты опроса

№	Субъективные критерии	Что характеризуют	Комментарий	Оценка
1	2	3	4	5
1	Пространственность, пространственная перспектива, (spaciousness)	Пространственное впечатление, ощущение объема, глубины, звуковой перспективы.	Звучание объемное/плоское	1–5

1	2	3	4	5
2	Ширина (width)	Ощущение ширины источника звука, размещение инструментов в оркестре (на сцене).	Источник широкий/узкий (ширина большая/малая)	1–5
3	Тембр (timbre)	Богатство звука. Звучание спектров верхнего (светлость, ясность), среднего и нижнего (теплота, мягкость) частотных диапазонов.	Тембр богатый/бедный; звучание теплое/холодное, мягкое/резкое/ясное/тусклое	1–5
4	Чистота, прозрачность разборчивость, четкость, ясность (definition, clarity)	Разборчивость мелодической и гармонических линий, партий музыкальных инструментов.	Звучание чистое, ясное/мутное, гудение; разборчивое/неразборчивое	1–5
5	Громкость, динамический диапазон (loudness, dynamic range)	Уровень звучания, динамические контрасты (разница между «р» и «f»), динамические оттенки.	Громко/тихо; динамический диапазон широкий/узкий/отсутствует	1–5
6	Близость, присутствие (intimacy)	Близость к источнику.	Источник звука близко/далеко	1–5
7	Баланс (balance)	Звуковой баланс между солистом и оркестром, между группами инструментов и т. п.	Оркестр звучит, сбалансировано/не сбалансировано	1–5
8	Текстура (texture)	Однородность пространственного звучания.	Текстура гладкая/рваная	1–5
9	Поддержка, взаимодействие (support)	Возможность музыкантов слышать себя и других музыкантов оркестра и осуществлять слуховой контроль исполнения.	Слышно себя и других хорошо/плохо	1–5
10	Шум (noise)	Внешние шумы, шум вентиляции, шум публики и т. д.	Шумы неощутимые/ощутимые	1–5
11	Общее впечатление			

В колонке «Комментарий» представлены образцы возможных вариантов ответов. Колонка «Оценка» заполняется цифрами от 1 до 5 (где 1 означает «очень плохо», 2 — «плохо», 3 — «удовлетворительно», 4 — «хорошо», 5 — «отлично») в соответствии с качеством звучания оркестра.

2.3 Систематизация результатов исследований

Результаты исследований звучания оркестров проанализированы и изображены с помощью диаграмм. Диаграммы отображают результаты для «живого» исполнения, где опрос проводился среди экспертов

по акустике, звукорежиссеров, композиторов, дирижеров, музыкантов, музыкальных критиков и регулярных посетителей филармонии (диаграмма 1).

Дополнительно проводился устный опрос среди любителей классической музыки непрофессионалов (диаграмма 2).

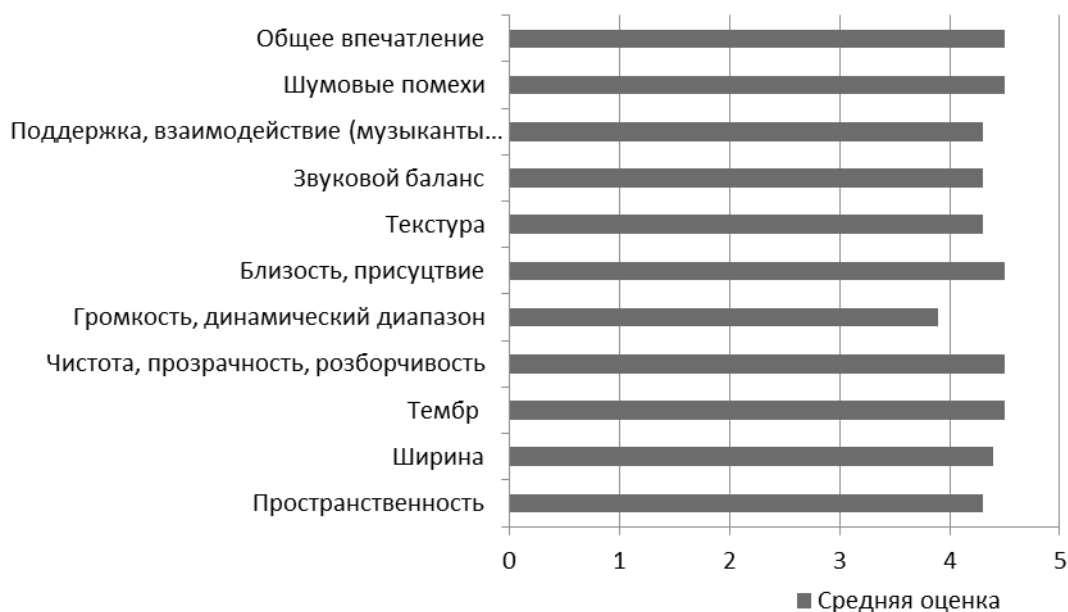


Диаграмма 1. Оценка звучания оркестра среди музыкальных экспертов

Источник — заполненные респондентами анкеты.

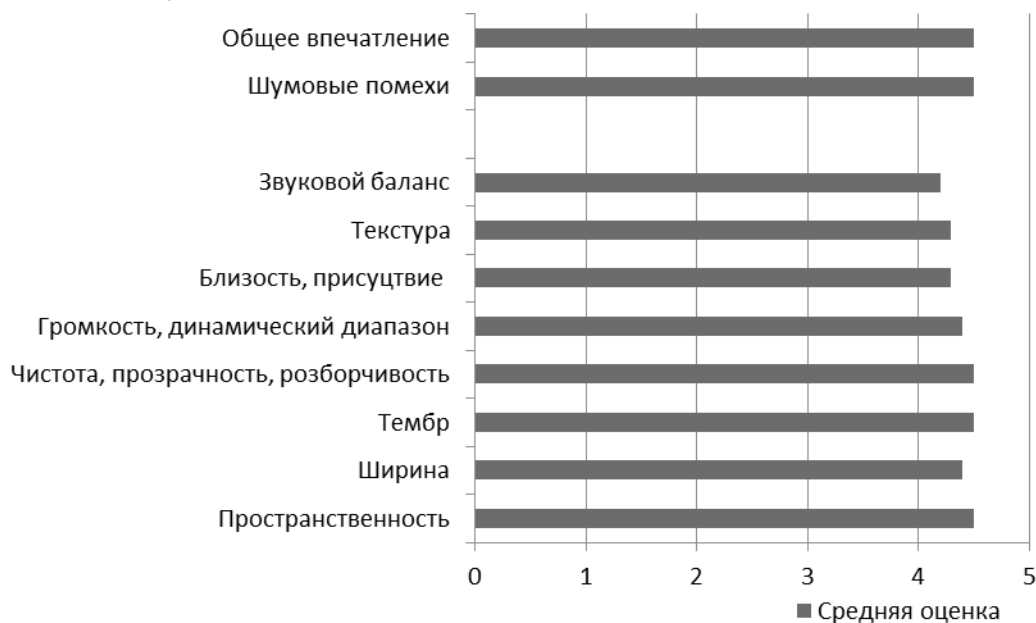


Диаграмма 2. Оценка звучания среди любителей классической музыки непрофессионалов

Источник — устный опрос респондентов.

3. Объективные измерения

Объективные акустические параметры были получены с импульсной переходной характеристики (реакция зала на единичный звуковой импульс при нулевых начальных условиях, то есть в полной тишине) в каждой позиции измерения (места установки

микрофонов) по два раза и соответствуют рекомендациям и требованиям, указанным в стандарте ISO 3382–2009¹. Это следующие параметры: время ревер-

¹ ISO-3382–1: “Acoustics – Measurement of room acoustic parameters – Part 1: Performance spaces (ITD)”. – 2009.

берации RT , время ранних отражений EDT , величина баса BR , прозрачность или коэффициент высоких частот Br , музыкальная разборчивость C_{80} , четкость D , силовой фактор или сила звука G , центральное время T_s , уровень боковой энергии LF_{E4} , коэффициент

внутрислуховой кросс-корреляции $IACC_{E3}$, и параметр, оценивающий уровень акустического комфорта на сцене и в оркестровой яме (поддержка звучания) $ST_{(sp)}$ (план зала показан на рис. 1).



Рисунок 1. План концертного зала, места установок измерительных микрофонов и источника звукового сигнала

Источник — техническая документация на концертный зал.

В нашем случае источник возбуждения имел импульсный характер (разрыв воздушного шара) и находился на сцене, рядом с местом дирижера по центральной линии зала. Зал был пустым. Позиции приемников размещались справа от центральной линии: места 17 ряды 5, 9 и 14 в партере, место 9 в центральной ложе, место 29 ряд 1 и место 11 ряд 5 на балконе. Ис-

точник звука был установлен на высоте 2 м над сценой, микрофоны — 1.5 м над полом. Импульсный отклик был записан на рекордер и обработан с помощью программного обеспечения Auroga и EASERA [4, 18, 19, 20] (усредненные объективные акустические параметры, полученные путем измерений, изображены в таблице 3).

Таблица 3. – Усредненные объективные акустические параметры

RT_s	EDT_s	BR	Br	C_{80} , dB	$D\%$	G , dB	T_s , ms	LF_{E4}	$IACC_{E4}$	$ST (sp)$, dB
1.96	1.89	1.12	0.81	-0.15	38.89	10.26	152.77	0.29	0.4	-11

Источник — данные, вычисленные с помощью специализированного программного обеспечения.

Таблица 4. – Рекомендуемые величины объективных акустических параметров

Акустические параметры	Рекомендуемые величины
RTmid	$1.8s < RT_{mid} < 2s$
EDTmid	$EDT_{mid} \approx RT_{mid}$
BR	$1.10 \leq BR \leq 1,25$ (If $RT_{mid}=2,2s$) $1,10 \leq BR \leq 1,45$ (If $T_{mid}=1,8s$)
Br	$Br \geq 0,87$
C80	$-4 < C80 < 0dB$
D	$D > 50\%$
Gmid	$4 < G_{mid} < 5,5dB$
Ts	60; 260ms
LF _{E4}	$LFC_{E4} \geq 0,19$
IACC _{E3}	$(1 - IACC_{E3}) \approx 0,70$
ST (sup.)	$-14 \leq ST (sup.)_{mid} \leq -12,5dB$

Источник [1, 2, 6].

4. Корреляция субъективной оценки с объективными акустическими параметрами

Субъективное оценивание в комплексе с объективными акустическими параметрами используется для полной оценки акустических характеристик концертного зала. Их соотношение исследовалось многими учеными акустиками [4, 20].

Ниже (таблица 5) показаны эти соотношения,

а также продемонстрирована подтверждаемость субъективной оценки объективными акустическими параметрами. Параметр ITDG, которого не было в предыдущих двух таблицах, — это разрыв между прямым звуком и первыми отражениями, полученный экспериментальным путем с импульсного отклика, и составляет 20–40 мс, что является допустимой величиной.

Таблица 5. – Корреляции между субъективной оценкой и объективными акустическими параметрами

№	Субъективные критерии	Акустические параметры	Комментарии
1	Пространственность	RTmid, EDTmid	Подтверждается
2	Ширина	IACC _{E3} , LF _{E4}	Частично подтверждается (IACC), подтверждается (LF)
3	Тембр (уровень баса)	BR	Подтверждается
4	Тембр (светлость)	Br	Подтверждается
5	Чистота, прозрачность разборчивость, четкость, ясность	C ₈₀ , Ts, D	Подтверждается. Частично подтверждается (D).
6	Громкость, динамический диапазон	G	Частично подтверждается (для больших составов оркестров)
7	Близость, присутствие	ITDG	Подтверждается
8	Поддержка, взаимодействие	ST (sp)	Частично подтверждается

Источник [13; 14; 15; 16].

В основном звучание оркестровой музыки в концертном зале Львовской филармонии отвечает стандартам звучания классической музыки, о чем свидетельствуют результаты субъективного оценивания и объективные акустические параметры. В некоторых анкетах опроса были замечания на избыток баса. Это можно объяснить наличием незначительных формантных областей в нижнем частотном спектре, возникающих вследствие интерференции звуковых волн. Такое явление может быть связано со спецификой размещения музыкантов на сцене, и, в некоторых случаях, — слушателей в отдаленных местах партера и балкона. Во время звучания большого состава симфонического оркестра в момент выполнения динамического оттенка «форте» (f), чаще «фортиссимо» (ff), возникает акустическая перегрузка, приводящая к искажению тембра, на что указывает величина субъективного критерия «громкость» в анкетах (таблица 2), а также объективный акустический параметр — G (таблица 3). Это явление можно объяснить недо-

статочным объемом концертного зала для звучания больших составов оркестров.

Выводы

Субъективное оценивание акустического качества концертных залов в основном подтверждается объективными акустическими параметрами, поэтому его применение можно считать оправданным. Особенно точное подтверждение (почти полное) оно получило среди специалистов. Устный опрос, который был проведен среди любителей-непрофессионалов симфонической музыки, показал односторонность их оценок. Они варьировались в пределах «хорошо» и «отлично», поэтому менее точны.

Итак, оценки звучания оркестров акустическими экспертами, звукорежиссерами, композиторами, дирижерами, музыкантами, музыкальными критиками и регулярными посетителями концертов (специалистами) в большинстве случаев соответствует реальным акустическим условиям.

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DOI: <http://dx.doi.org/10.20534/AJH-17-5.6-25-31>L. S. Dsewickaya¹

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ADEQUACY OF TRANSLATION OF TERMINOLOGICAL LEXICON IN TEXTS WITH ECONOMIC DIRECTION: FUNCTIONAL ASPECT

Abstract

Objective: The purpose of the publication is to disclose the main linguistic and extra-linguistic aspects that contribute to the adequate translation of special economic terms.

Methods: The research was conducted with the use of research methods: theoretical (analysis of psycho-pedagogical and linguistic literature), empirical (observation of the educational process and study of pedagogical experience in order to study the specifics of the translation of special economic terms); own linguistic (component and etymological analysis).

The results of the study have developed an algorithm for the adequate translation of terms and terminology in the texts of the economic profile. It is proved that, in its cognitive function, the language of translation is minimally dependent on the grammatical composition of the language. The adequacy of the translation depends largely on the understanding of the internal form of the non-equivalent lexicon, which states the non-differentiation of the species economic concept in the target languages.

The scientific novelty of the proposed research is to identify the system of characteristic features of the modeling of the translation of economic texts based on the analysis of the lexical composition and morpho-syntactic structure of terms; component analysis of the internal form of terms and term combinations; linguocultural and etymological analysis of key terms; definition of the criteria of functional discourse of unambiguous terms and terms-doublets.

The practical significance of the performed research is to apply techniques that promote adequate translation at the following levels: 1) heterogeneity in lexical composition, lexico-grammatical structure of terms; 2) heterogeneity of grammatical forms of one of the components of the comparable economic terms; 3) heterogeneity of grammatical forms (change of case form of the main (pronounced) noun; indirect pronouns of the noun in the structure of the term of the language of translation and the introduction of prepositions; change of number — singular/plural with the change of case form and including the introduction of prepositions; heterogeneity in the lexical meaning of nuclear/non-nuclear and additional components). Separate consideration was given to the algorithm of the translation of the non-equivalent economic terminology, which provides lingvo-cultural justification, since the background economic context determines the specifics of the translation of special terminological units.

Keywords: translation method; economic term; non-equivalent economic term.

Introduction

In modern terminology, an increasing attention is paid to the issues of the functioning of terms in speech. Terminology is seen as a system that organizes a particular genre of text that plays a crucial role in business communication. The relevance of studying the ways and problems of translating of economic terms is determined by the expansion of cooperation between Ukraine and foreign companies and the growing volume of communication in this professional field.

Terminological lexicon allows us to present the most accurate, clear and economical content of this subject and provides a correct understanding of the substance of the issue that is treated. In the special literature the terms carry the main semantic load and occupy the main place among other general literary and official words [1; 2; 3].

The main specific feature of the language of economic literature, from a lexical point of view, is the wide use of terminology.

In the Ukraine, V. Akulenko, V. Dubichinsky, T. Kiyak, T. Panko, A. Ponomarev studied common issues of an internationalization of the vocabulary composition of the language. Foreign linguistics is represented by researches that cover the peculiarities of translations of intertextual terminology (K. Werner (Germany), W. Flood, A. Heller, D. Sounson (England), M. Yushmanov (Russia), etc.) Professional economic vocabulary with international components was the subject of consideration of N. Dukarov, G. Pasternak.

The general requirements for terminological lexicon from the point of its functionality are such characteristics: monosemy (polysemy is used in exceptional cases, as a rule, in texts that contain interdisciplinary information); accuracy; codification. It is important to take into account such specific characteristic of the term, for some cases, the artificiality of lexico-semantic education, which determines the amount of sectoral information at the current stage of development, which contains the complex of scientific knowledge that facilitates the disclosure of the concept's content [4; 5; 6, c. 59; 7; 8, c. 25; 9, c. 458].

The question of the adequacy of the translation of terms that function in texts of the economic direction is topical.

The purpose of the article is to reveal the main linguistic and extralinguistic aspects that contribute to the adequate translation of special economic texts.

Methodology used in the publication is next: theoretical (analysis of psycho-pedagogical and linguistic literacy), empirical (observation of an initial process and study of the educational experience for the specific study of translation of special economic terms; own linguistic (etymological and component analysis).

Results of the research

Translation is considered as a way to ensure communication between multilingual parties by reproducing the message it in another language which contains in the original text. In the most general terms, linguists have usually defined translation as a substitute for text in one language by text in another language and only then proceeded to study of the requirements that must be satisfied in the created text in order to serve as a complete replacement of the original text and the relations that appear between the original texts and the whole translation and between individual parts and units of these texts [10]. Thus, the linguistic theory of translation studies the relations between the units of the two languages not in isolation, but in texts of a certain type (original and their translations), and all the data that this theory possesses has been obtained from a comparative study of such texts. One of the main purposes of the translation is the transfer of information at the lexical, grammatical and stylistic levels. In addition, the main task is to transfer the pragmatic function of the text (what the author wanted to say and how this is understood by the reader).

The fulfillment of this function is possible through the adequacy of the translation. Adequacy relies on a real translation practice, which often does not allow 100% transfer of all communicative content of the original. As a result, the decision taken by an interpreter is often compromised. In other words, in the process of translation with the aim of transferring the main and essential in the original text (its communicative attitudes and communicative effect), the translator often has to make certain losses [11; 12].

In addition, the achievement of the adequacy of translation requires from the translator, first of all, the ability to produce numerous and qualitatively diverse in-

terlanguage transformations — the so-called translation transformations — so that the text of the translation, with the fullest possible completeness, conveys all the information contained in the original text.

In some cases, for the success of interlingual communication, the achievement of equivalence is not necessary, and sometimes even undesirable. This fact necessitated the introduction of an evaluative term «adequacy of translation», which indicate the accordance of translation with the requirements and conditions of a specific interlingual communication act.

An important role in ensuring the pragmatic adequacy of the translation is played by sociolinguistic factors, which determine the difference in speech of individual groups of native speakers. In particular, additional difficulties for ensuring a comprehensive understanding of the transfer of the transmitted message by the receptor may arise in connection with the presence in the text of the original deviations from the public norm of a foreign language, the use of such substandard forms as dialectal, social dialectal and imitating a foreigner's speech [13].

In accordance with the meaning of the terms «equivalence» and «adequacy», an adequate translation includes a certain degree of equivalence, but an equivalent translation may not be adequate.

In the process of correct translation of economic terms the following aspects should be considered [14; 15; 16]:

1. Differences in the lexical composition and morpho-syntactic structure of terms in the target language and in a foreign language, which may affect the equivalence of translation: a) divergence in the morpho-syntactic structure; b) divergences in the lexical composition; c) divergences in the lexico-grammatical structure of terms.

Based on our observations, differences in the grammatical structure of languages are the main reason for the divergences in the morpho-syntactic structure of English terms, which consist of two or more nouns and their ukrainian equivalents. The grammatical structure «noun + noun», the most productive in the formation of English terms in Ukrainian terms, as a rule, is seen the construction «adjective + noun» (Adj + N): 1) Mortgage and consumer finance were drastically re-

duced, fundraising for new equity funds became more difficult and commercial loan syndication was massively affected by the crisis (*особистий дохід/личны́й до́ход*); 2) Loan portfolio — MCA made credit lines of 317, 000 soms available for energy efficiency in 2009, making the total loan portfolio worth 1, 141, 000 soms (*кредитні лінії/кредитне линии*); 3) The Group's share of the post-acquisition profits or losses of associates is recorded in the consolidated interest income statement, and its share of post-acquisition movements in reserves is recognised in reserves (*процентний дохід*).

2. Divergence of grammatical forms of one of the components of the compared terms of a foreign language and the target language. We observe this kind of divergence, first of all, in the process of translating English terms, formed by a combination of nouns.

When comparing the grammatical form of terms which consist of two nouns (N + N) or a noun and a name group, the following types of divergences are observed:

2.1. Change of the case form of the defining noun (the form switch of the common case to the genitive case): The principles of non-discrimination, fairness and transparency are designed to promote good practice and efficiency and to minimize risk figure in implementing Bank-financed projects (*показник ризику/показатель риска*). The EBRD launches two grivna bond issues, underscoring the Bank's commitment to developing the domestic capital market and supporting local currency lending in Ukraine (*ринок капіталу/рынок капитала*).

2.2. Change of the case form of the defining noun (the general case of the noun in the structure of the term foreign language — the case of the noun in the structure of the term of the translation language) and the introduction of a preposition. For example: The deferred tax asset at 31 December 2010 of UH 2, 551 million (at 31 December 2009: UH 4,230 million) represents income taxes recoverable through future deductions from taxable profits (*податок на прибуток/налог на прибыль*).

2.3. Change in the number (singular — plural) at the same time as the change in the case form (including the introduction of a preposition): Trade finance reached a total 2010 share turnover of €551 million. This represents a steep decline from previous years, when trade

was rapidly expanding throughout the region (*оборот акцій//оборот акцій*). The primary objectives of the financial risk management function are to establish risk limits, and then ensure that exposure to risks stays within these limits (*financial risk management*).

Terms, which consist of two nouns and are associated with the preposition of (N of N) are usually translated by the term “noun + noun in the genitive”: The principles of consolidation, non-discrimination, fairness and transparency are fundamental in all the EBRD’s procurement activities (*принципи консолідації//принцип консолідації*). The Bank’s Evaluation Department is headed by the Chief Evaluator, who reports exclusively to the Bank’s Board of Directors (*Совет директорів//Совет директоров*).

Other prepositions which connect two nouns in the composition of terms are usually conveyed by the corresponding prepositions of the Ukrainian language: Dividends per share are included in dividend income when the Group’s right to receive the dividend payment is established and collection of the dividend is probable (*дивіденд на акцію//дивидент на акцію*). The EBRD provides for a guarantee for loan during the total period (*гарантія по позиції//гарантия по позиції*).

Morpho-syntactic structure «noun + noun in the oblique case (including the preposition)» is quite productive in the formation of Ukrainian terms; predominantly with the help of this structure and the structure Adj + N, the value of English terms with the structure N + N is transmitted.

We have considered the most typical cases of the divergence between the morpho-syntactic structures of the equivalent terms of a foreign language and language of translation; other varieties are represented by single cases and are not typical for the studied interlanguage correspondences.

In many cases, the theoretically and practically coexistence of Ukrainian (as well as English) terms of a single lexical composition is possible, but different from a point of morphosyntactic structure [17; 18]. Thus, in Ukrainian compound terms equally the definitions are well-defined and agreed definitions that are expressed by the name of the adjective, and additions that are expressed by the noun in the oblique case with the preposition. In such

cases, as a rule, one of the variants appears to be more stable and fixed in the language as a term, but sometimes the grammatical structure is not so rigid and polysemantic translation is allowed: During 2009 this sector suffered considerably as a result of the ongoing difficult market factors and liquidity constraints in many countries, especially in the regions outside the main cities. Market factor — *ринковий фактор//рыночный фактор, что может быть переведено и как фактор рынка*.

Proceeding from the fact that the divergence in the structure of terms at the grammatical level does not hinder the achievement of the equivalence of translation (since it is possible to express identical categorical meanings in a foreign language and in the target language), we can state that in its cognitive function the language depends minimally on the grammatical system of the language.

3. Differences in the lexical composition of terms of a foreign language and the target language. When comparing the English compound terms and their Ukrainian equivalents, there are divergences in the lexical meaning of the nuclear or determining components [19; 20]. Due to different nomination traditions, different key terms serve as the basis for the formation of composite terminological units in a foreign language and in the target language. For example: All purchases and sales of financial instruments that require delivery within the time frame established by accounting convention («regular way» purchases and sales) are recorded at trade date, which is the date that the Group accounting for delivering financial instruments. Literally: accounting rules — *метод бухгалтерського обліку//метод бухгалтерського учета*; Based on our best judgment of the eventual outcome of these claims, UH 534 million in 2005, UH 551 million in 2008 and UH 1, 676 million in 2009. Literally: the use of losses — *погашення збитків//погашение убытков*.

Differences in the lexical meaning of the non-nuclear components of compound terms (including those accompanied by a change in the part of speech) are also explained by different traditions of nomination of concepts in a foreign language and in the target language:

The Bank invested € 134 million to buy a minority equity stake in Transcontainer, the largest operator of rail containers, which parent company is Ukrzal-

iznitsya. Literally: parent company — *материнська компанія*//*материнская компания*.

The fact that the reason for this type of translation inconsistencies are precisely the traditions of the use of different language units in the content of a foreign language and the target language, is clearly demonstrated by the following example: if in English coexistence of the terms-synonyms short-term liabilities (*короткострокові зобов'язання*//*краткосрочные обязательства*) and current liabilities (literally: *поточні зобов'язання*//*текущие обязательства*), each of which can be used to compile a balance sheet, in Ukrainian both terms are translated as short-term liabilities, according to the strictly regulated balance sheet.

The translation of nonequivalent terms provides primarily a linguocultural justification, since the background (in our study — economic) context determines the specificity of the translation of special units.

To non-equivalent terminology we refer two types of English terms: 1) Terms that name the phenomena (concepts) and are absent in the Ukrainian economic reality: custodian; temporary difference; valuation allowance and others. 2) Terms that name the phenomena which arose in Ukrainian reality (in particular, in the last decade), but have not yet formed a separate category in the conceptual apparatus of the corresponding professional sphere: in this case, the undifferentiated nature of the species concept is the reason for the absence of a term in the target language. For example:

The weighted average number of ordinary shares outstanding are adjusted for the effects of an assumed conversion of all dilutive securities into ordinary shares (*цінні папери, що розбавляють капітал*//*ценные бумаги, разбавляющие капитал*).

The present value of the termination of an income benefit is determined by discounting the estimated future cash outflows using interest rates of high-quality corporate bonds that are denominated in the currency in which the benefits will be paid (*грошова допомога, що виплачується після закінчення терміну дії договору*//*денежная помощь, которая выплачивается после окончания термина действия договора*).

Note that in terms of the second variety, there is no equivalent term in the target language, but there is often a

bilingual equivalent — preterminal, which is a combination of terms and common lexical units. This equivalent conveys the meaning of the term of a foreign language, but does not satisfy the requirements for terms: it does not specify a species concept in the system of the target language, it is not characterized by shortness, invariable structure, semantic fusion.

Thus, the differences in the system of concepts of the two languages, which are explained by extralinguistic factors and create objective conditions for the emergence of nonequivalence. There are several ways to translate the equivalent lexicon:

1. Selection of the Ukrainian term or the common word (less often — word combination) with a close meaning. The selection of the term (word) of close semantics also allows to translate the term «benchmark» in the sentence: The performance requirements are consistent with the internationally recognised Equator Principles — the benchmark for the financial industry to manage social and environmental issues in project financing.

Benchmark is an indicator on which the company's management is guided in the formation of any strategy (marketing, financial, production); This is the standard that the company sets for itself, comparing the goals and results of its activity with the corresponding key performance indicators of competitors for the formation of targeted strategic indicators [21; 22; 23]. The very process of identifying the main strategic indicators and determining their target values based on the indicators of competitors and selected strategic tasks is denoted by the term benchmarking. This concept assumes a fundamentally new approach to the formation of a strategy based on a system of key indicators, which creates all the prerequisites for its consolidation in the terminology of the Russian language.

2. Transcription, transliteration. Acceptance of transcription (or transliteration) in translation can be used in a limited way: on the one hand, it requires the term to have a certain sound system and an ending that promotes the subsequent formation of case forms of the noun; on the other, it is necessary to incorporate organic borrowing into the system of concepts of the corresponding field. It should be considered that transcription is appropriate when translating the term «outsourcing», which

indicates the transfer of the carrying out of an economic operation to another organization (with the aim of cost reducing and concentrating on core activities): it does not have a Ukrainian equivalent, since the mechanism designated by it, not so long ago spread abroad, while practically not used by Ukrainian enterprises. Selection of a Ukrainian word of similar meaning in this case is impossible; the descriptive translation is too cumbersome, so to translate the term can be recommended the transcription: *аутсорсинг*.

3. Descriptive (explanatory) translation. Descriptive translation allows you to convey the meaning of the term quite accurately, but the multicomponent phrase complicates the syntactic structure of the corresponding sentence of the text of the target language: The potential holding gains are significant in all sectors of the economy; holding gain (*дохід від збільшення вартості активів* / *доход от увеличения стоимости активов*).

Conclusions

The most important problem of achieving equivalence in the translation of scientific and technical texts is the transfer of the original content of the text with the help of the terminology of the target language. The difference in the terminology of a foreign language and the target language is the reason of the biggest difficulties in translating of scientific and technical texts. Hence here appears the need to study terminology and finding ways to translate a partially equivalent and nonequivalent lexicon.

Since the problem of research of terminology is one of the key issues in the study of scientific and technical texts, identifying differences in the system of concepts, which are expressed in terms of a foreign language and the target language contributes to solving the problems of translation of terms in the spheres of their functioning.

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SYSTEMIC CONNECTIONS BETWEEN LINGUODIDACTIC TERMS: THE FUNCTIONAL ASPECT

Abstract

Objective: The publication is devoted to the disclosure of the systemacy of linguodidactic terms at the level of lexico-semantic groups and hyper-hyponymic, synonymous, polysemic relations, regularities of the compatibility of relations within the analyzed groups.

Methods: The research was conducted by using such research methods: theoretical (analysis of psychological and pedagogical and linguistic literature), empirical (observation of the educational process and study of pedagogical experience for the purpose of codification of linguodidactic terms); own linguistic (component and etymological analysis).

The results: Have been revealed the integration tendencies in the process of codification of terms and term combinations; have been determined the generic-specific relations within the categorical apparatus of linguodidactics. Author outlined the thematic fields that are constituted on the understanding of the linguistic personality (outlined and characterized the levels of realization) and the language picture of the world (correlated to the level of mentality of the representative of the linguistic culture; linguistic and cultural code). Separate consideration was given to the terms of the phenomenon of stereotyping identification, have been outlined the level of its implementation in the speech discourse. Also author carried out the analysis of denotative and connotative shades of semantic value of basic linguodidactic terms. The principle of integration in the formation of the modern linguodidactic dictionary has been used, which allows to submit complex dictionary articles to linguodidactic terms taking into account modern achievements of psychological and pedagogical thought, linguoculture/linguoculture. At the level of linguistic competence is distinguished the concept of the marking of the communicative phenomenon of *interference*, which is correlated with field relativistic characteristics (interference threshold, communicative deviation, language deviation), have been outlined the causes of deviations in the communicative discourse.

Scientific novelty of the conducted research lays in codification of linguodidactic terms of the modern dictionary taking into account the achievements of scientific schools of psychological, pedagogical and philological directions, integration of humanities disciplines.

Practical significance consists in the possibility of performing non-linguistic, contextual and linguocultural analysis with partial application of *intercultural communication research methods*, which are interpreted in the study at the level of the vocabulary article as theoretical setting, tactics of studying the specifics of intercultural communication. Author developed an algorithm for coding of the linguodidactic term, taking into account the integrative principle.

Keywords: linguodidactic term, systemicity of lexico-semantic system, integration principle, thematic field, linguodidactic lexicography.

Introduction

At the present stage the term «linguodidactics» primarily is defined as: 1) an integrative science which jurisdiction covers the methodological problems of teaching native and foreign languages; 2) a part of any particular linguomethods, in which contains the determination of the object, subject, content and structure of the course,

the principles, forms, methods, techniques and training aids [1; 2; 3; 4; 5].

Modern Ukrainian linguodidactics in the terminology system produces the method of language training of students with a tight relationship of professional competence work-out (T. Donchenko O. Lyubashenko, L. Matsko, N. Nepyyvoda, L. Palamar M. Pentyly-

uk O. Semenoh, O. Symonenko; L. Bachman, J. Legowicz) [6; 7; 8; 9; 10].

Considering the fact, that systematicity of language primarily shows itself in the presence of lexical-semantic groups and determination of systemic (hyper-hyponymic, synonymous, polisemichnyh respects the laws compatibility) relationships inside these groups [11], it appears, aspect of studying of linguodidactic terminological system are nest formation and paradigmatic relationships that enable differentiation and classification procedure of linguodidactic terms, determination of their functional patterns.

Linguodidactic term refers to didactic concept as the first element of didactic knowledge and serves as its symbolic (language) model. The concept and its content, its structure are logical and semantic basis for building of terminology meaning in a form of definition, which colligates the most significant features and relationships of didactic phenomena that is extrapolated to language training.

Results of the research

Linguodidactic terms are represented with such lexical-semantic fields: *education, training, methodology, competence*. An example of tiered relations with the nuclear component of learning may include: — 1) **patterns of Ukrainian language teaching** (*understanding the semantics of language units, the ability to absorb the norms of the literary language, the development of linguistic intuition, etc.*) — 2) **patterns of language teaching** — 3) **principles of teaching** (*aggregated linguodidactic (traditional and modern)/linguodidactic (common and specific methods — a communication between language learning and speech activity, studying of morphology on syntactic basis, lexical and syntactic, structural and semantic)* — 4) **methods of teaching Ukrainian language** (*methods of teacher/methods of student*) — 5) **techniques of language teaching** (*didactic and methodical techniques, specific techniques — grouping of linguistic phenomena, sentence spread, sentence construction, declension of words, linguistic experiment*) — 6) **ways of teaching Ukrainian** (*didactic material, apparency, technical ways of teaching*).

The integration principle of relationships building of linguodidactic terms allows to build a genus-specific dependencies. An example is the substantial workload of the definition *language skills* (formed on the basis of emotional and volitional qualities — imaginary memory, gen-

eralized perception of linguistic phenomena in the unity of meaning and form, broad and rapid generalization of linguistic concepts) that is constituted on the psychological and language basis of a considered event. Accordingly, the structural components of language skills are defined as such relational components: 1) psychologically determined — *verbal memory, imaginary memory (remembering of images), creative thinking, linguistic thinking, imagination*; 2) those that reproduce the essence of language and speech activity (*subtlety of sense of language, ability for creative and expressive language, the language observation, the speed of learning of material*).

Within the conceptual and categorical apparatus, — linguodidactic competence (a generic term on the subject of competencies — knowledge, skills, assessment of attitudes and experience of specialists) is considered within the categories of educational competence, accordingly, that is defined as a significant part of linguomethodical, common methodical, didactic and professional pedagogical competences.

At the level of hyper-hyponymic relationships can be revealed such correlated levels of detection of competence of linguodidactic competencies: 1) *the substantive basis* of professional training of future linguists (**informative** — learning of the scientific and technical information); **methodological** — professional ability to understand and solve problems linguodidactic); 2) *language and speech (linguobjected) basis* (**language, speech, communicative** — an ability of the philologist to make a dialog according to the situation and the choice of stylistic resources; determine the content of the work directed to the development of students' abilities to use language as a mean of communication); 3) *psycholinguistic basis* (**motivational** — the ability of an individual to set learning goals, adopt methods, tools, model technology based on the use linguodidactic information, **logical** — integrated ability to analyze, synthesize, compare, interpret scientific and methodological information on trends and laws of linguodidactic's development); 4) *methodical (procedural) basis*: **discursive** — the ability to deploy didactic discourse); **technological** — the ability of professional to design and implement educational technology on language teaching; **projective** — the ability to model, design and construct learning situations, basic types of

lessons; 5) *culturological* basis (**axiological (cultural) competence** — the ability to use a national, universal, spiritual values, to teach value orientation, 6) psychological (**creative** — the ability to master pedagogical innovation and actively use it in the content of educational process, **reflective** — the ability to understand the results, to analyze own activities, correcting further professional activity according to the results of reflection).

In terms of *intercultural communication* as a process of communication between people which belong to different ethnic linguocultural communities, served by different ideoethnic languages that can consider the linguodidactic terms as basic in the implementation of socio-cultural and cultural substantial lines of the public school curriculum, in the content of professional training of future philologists [12; 13; 14; 15].

In the considered context can be stated the rethinking of the concept of linguistic identity by expanding additional semantic nuances: *linguocultural settings, linguocultural identity, national and cultural marking of language picture of the world*. Today in modern linguodidactics interrelation is widespread, but not the terms *linguistic identity* and *linguocultural identity*. In this case, the substance of the concept of *linguistic identity* is narrower because not fully take into account cultural meaning of components of the proposed concepts (**linguocultural identity** is considered primarily as one that has a unique cognitive base knowledge of all levels of a particular ideoethnic language, culture (especially spiritual) flexible communication strategy and communication taken within a specific national linguosociety).

In an integral structure of the model of the linguistic personality are distinguished hierarchical levels of language proficiency: verbal-semantic (possession of the natural language on the basis of knowledge of the language system); linguistic-cognitive level (measure of the formation of the linguistic picture of the world by organizing and systematizing individual concepts, words-concepts, images); motivational-pragmatic (activity-communicative needs) level (the system of motives and values of the features in the language picture of the world).

As the speech goes about lexicographic genealogical complication of the term *linguistic personality*, the term combination that is under consideration remain within the

framework of linguistic and didactic vocabulary in its interrelationship with complementary terms such as *communication, speech code, and linguistic picture of the world*.

Thematic field advisable to apply at the level of paradigmatic relationships of concepts of communication and linguistic deviation, determined incompatibility/interference locales: 1. **Communication**: *communication as a mode of existence of phenomena of language, national and cultural markings of communication, verbal/non-verbal communication, intercultural communication, monolingual/bilingual communication, ethno-cultural convergence, linguocultural identity, thinking structure conditioned by national and cultural factors, interference threshold*. 2. **Communication deviation** (due to a) the semantic ambiguity of relations, lexical significant meanings, word forms and structures; b) a violation of the communicative code; c) social and psychological components of communication; d) the divergence of non-verbal ways of communication; e) varying interpretation of national and cultural phenomena); linguocultural settings of communicative and stylistic qualities of language.

An expanding of the importance of intercultural paradigm communication (the ability to carry out cross-cultural communication, which requires knowledge of lexical units of national-cultural component of semantics and skills of their appropriate adoption in situations of intercultural communication and the ability to use background knowledge to achieve understanding in situations of indirect and direct intercultural communication) which is determined mainly by an input to the field of terminological concepts such as *code* (system of conventional signs, the rules of information transmission via communication channels (communication) accordingly to the socio-cultural features)/**cultural and language code in communication** — the unity of language and cultural knowledge that reveals in intercultural communication and embodied in verbal communications. Specified relations form interdisciplinary definitions: *code of culture* (set of characters (symbols), meanings and their combinations that are available in any subject of the culture of certain national linguocultural community)/*code of culture spiritual* (code, in which moral values and standards are reflected and connected with their basic positions of culture (good/evil, bad/good)).

Formation of linguistic identity in terms of intercultural communication assumes an input of the concept of linguistic deviation to the system of diagnosed apparatus, which is constituted on the phenomenon of code switching (aware transition of the speaker in the processes of language (including intercultural) communication from matrix language to another language, associated with changes in the parameters of the communicative act) and *code mixing* (unconscious, unmotivated shift by the speaker in the process of verbal communication from matrix language to another, not related to the change in terms of communication, often as a result of low language, linguocultural and intercultural competencies in one of the used languages) [1].

Note that at the level of language proficiency it is defined the concept on the communicative phenomenon of *interference* (interaction of speech systems, speech mechanisms, the impact of native language on the studying language, in the process of its mastering — monolingual/bilingual/polilingual). The development of linguistic culture of linguistic identity is reviewed by the antinomy of normal/antinormal, which is manifested in deviations from the normal and system of another language under the influence of native one.

Formation of the linguistic personality involves the achievement of a high level of communicative competence, which, in turn, provides an observance of the signs of speech-normativity, accuracy, correctness, logic [16]. As an example may serve the terms which are included into the linguodidactic dictionary to denote antinormative phenomena, so-called linguistic deviations — *pleonastic constructions*, which state the violations of the logic of speech: *vivid contrasts*; *short logo*; *book's exlibris*; *reality*; *statistical calculations*; *monumental memorial*; *colorful mosaic*; *free vacancy*; *dancing dance*; *modern modern*; *super sensitive extra sense*; *exquisite delicacies*; *the main priority*; *advanced avant-garde*; *small miniature*; *diverse collage*; *fast (prompt) dispatch* and so on.

Such lexical combinations indicate the breaks of the logic, since both components reproduce a similar meaning, and editing of such phrases should include the vocabulary reference for a foreign term, italian: *Mosaic*, from lat. *Musivum*, from gr. — Sanctuary of muses; originally planted semantics containing the meaning *colorful*: «image or pattern made of cobalt glass, colored stone»

(colored mosaic); *dancing* — eng. *dansing (hall)*, dance (hall); room or dance floor; french *delicatesse* — delicious, exquisite dish; german *prioritet*, from lat. *prior* — first; primacy in something; preferential right, value (main priority); lat. *moda* — slope, direction (modern); lat. *sensus* — feeling; *extra* — more than or beyond (*super sensitive extra sense*); french *avant-garde* — advanced detachment (advanced avant-garde); greek *logos* — word (verbal logo); lat. *ex libris* — from books (book exlibris); french *collage* — pasting with wallpaper (colorful collage); french *depeche* — hasty message, telegram (quick dispatch); english *statistics*; quantitative accounting of mass phenomena (statistical calculations); lat. *monumentum*; architectural or sculptural structure, monument (monumental memorial); *expression* — lat. *expressio*; expressiveness; *price list* — german *preis*; price, official directory of prices for goods and services (price list); *exhibits* — lat. *expono*; exhibited for review; the subject of art, an example of the products that they exhibit at the exhibition; french *chronometrage*, from the Greek. — time and measure; one of the main means of studying time expenditures (chronometrage of time); *spectre* — from lat. *spectrum* — what is seen and revealed — the color line that is formed during the expansion of a white ray passing through the prism; continuous color transition from one to another; a set of display within a given field, matter (wide spectrum, color spectrum).

Language deviations can be determined by: 1) intercultural incompatibilities, which are largely represented by nonequivalent vocabulary; 2) the ambiguity of semantic relations, lexical significant meanings, word forms and constructions; 3) translation errors; 4) violation of the rules of the communicative code; 4) communicative failures of linguistic and cognitive nature (related to cultural competence).

Accordingly, the defining definition of the concept *linguistic personality* should include not only a lineal hierarchy, but also a criterion characteristic (value, ideological, cultural, cognitive (gnostic) and behavioral (linguistic code)).

Thematic lexical-semantic relationships of linguodidactic terms can be presented as an example of such integration basis: **Language picture of the world** (interdisciplinary relationship of linguistics, psychology, cultural studies and philosophy). **Terminological field:** *mindset*,

mentality, language picture of the world, conceptual picture of the world, linguocultural identity, valuable dominant culture, national spirit of the language, language code, ethnosemiotics, national categorisation of reality, valuable constant of culture, linguomentality, linguocultural locus, symbol, concept, national and cultural symbol, linguocultural field; national psychological (motivational background, intellectual, cognitive, emotional, volitional, communicative) features of ethnicity and their expression in language picture of the world.

If we consider the linguistic picture of the world as an optional object of studying of linguodidactics in terms of the formation of a linguistic personality, criterion indicators are: a) aspects related to the specificity of the thesaurus organization of the cultural-linguistic community, which is realized at the level of the system of traditional images, comparisons, symbolic use of studied denotations; b) aspects which are determined by the specifics of the language of a particular cultural-linguistic community which are represented by a system of stereotypes/symbols/images; structure of texts; the national significance of functional stylistics.

Indicators of stereotyping in the definitive structure of the linguistic personality is determined as: the repeatability of the characteristics of a particular object in different types of linguocultural and communicative discourses; the presence of derivatives in which semantics a certain characteristic is repeated or becomes concomitant; the presence of trails, based on which the feature prevails; the presence of phraseologisms, which include this lexeme; the presence of paremia (a variety of regular expressions — from phraseology to proverbs and sayings), in which a certain characteristic is actualized.

In the structure of the language and cultural personality also is distinguished the level of stereotyping, which is qualified as a national stereotype — an image that, while indicating an ethnic or national group, implies the presence of a certain feature in all representatives.

On the basis of stereotyping [17] appeared a large number of national-cultural oriented images — cosmic, terrestrial, diverse elements, animals, birds, plants, etc. Important from the point of forming a linguistic and cultural personality is the mastering of culturally designated linguistic resources, accordingly — socialization in the linguistic and cultural community.

The language of any ethnic group represents a significant number of national-cultural symbols and stereotypes; its knowledge, ability to use — a necessary condition for socialization within the linguistic community, as well as the condition for successful communication with native speakers of different languages and cultures.

An example is the linguistic and cultural commentary of the lexems on the sign of temporality (within the methodology of studying the section «Lexico-semantic system. Phraseology»): *Take your time, you will not buy time for money; Everything is good at its time; Time is not fortunate, you do not have it; Time will teach everything.*

The language picture of the world can be represented by the linguistic and cultural field of the biblical phrase: *Adam's edge, Guardian Angel, God's gift, God's judgment, Being on the cross, Beloved soul, Faith is dead without deeds, Peter's denial of Christ, Wolf in sheep's skin, Yudin silvery.* The analyzed paremias are studied by application of the appropriate linguocultural method. We state the consistency of linguocultural and linguodidactic analysis, which consists in the following aspects: 1) the interpretation of equivalent/unequivalent vocabulary in accordance with the lexical level of the formation of the linguistic personality; 2) the development of a methodology for studying the equivalence/equivalent vocabulary; 3) the use of linguocultural analysis of linguistic units, which involves the following stages: a) the construction of a nominative field of the concept, which includes the core (direct nominations of the concept, its synonyms, other diverse features) and periphery (near, far, extreme); to determine the latter, they include paremias, aphorisms, phraseologisms, artistic and journalistic texts; b) analysis and description of the semantics of language means which are included in the nominative field of the concept; c) cognitive interpretation of the results of the description of the semantics of language means — the display of cognitive features that form the investigated concept as a mental unit.

The complication of the linguodidactic dictionary is also due to the introduction of the concept of comparative techniques, which include a description of the content in the form of a list of cognitive features. Modeling of the concept as a unit of consciousness involves a description of the macrostructure of the concept, the categorical

structure and content of the concept in the form of a field structure.

The analysis of the common and different in the semantic structure helps to trace the psycholinguistic mechanisms of language-code reorientation [18], which is important for a scientifically grounded model of the orthonym code and enriches the knowledge about the national-cultural specificity of the linguistic picture of the world, reveals the peculiarities of the emergence and use of the studied names of birds in the Ukrainian language. A complex linguocultural analysis of the semantics of the names of birds in the Ukrainian language makes it possible to identify peculiar, not studied to this day, shades of perception of any denotat in the context of different linguocultures.

An example can be a comparative analysis of the thematic (ornithological) vocabulary, which is non-equivalent in the content of language pictures of the world. The ornithological language picture is represented by the established (Latin equivalents): *вивільга/жовтобрюха* (*Oriolus oriolus*); *гусак* (*Anser anser*); *жайворон* (*Alauda arvensis*); *зогуля/зигзиця* (*Cuculus canorus*); *крук/ворон* (*Corvus corax*; *Corvus cornix*); *лебідь-шипун* (*Cygnus olor*); *лелека* (*Ciconia ciconia*); *перепел* (*Coturnix coturnix*); *пузач* (*Bubo bubo*); *сич* (*Aegolius funereus*); *сова* (*Strix uralensis*); *сокіл* (*Falco biarmicus*); *соловей* (*Luscinia megarhynchos*); *стриж/берегівка, серпокрил, серпокрилець* (*Riparia riparia*); *чайка/кавка-галка, мева, кизитка, рибалка* (*Vanellus vanellus*); *чапля* (*Ardea cinerea*), at the same time, paremia allows to identify connotative implementations of ornithonisms, accordingly, to build a *linguistic personality* in close relationship with the formation of levels of mentality:

Raven. ger. Was hilft's, dass der Rabe badet, er bleibt doch schwarz; **ukr.** — the same but about a raven: Яка ворона в воду, така і з води, Вороні і мило не допоможе — все чорна буде; **ukr.** Чорний як воронове крило — **rus.** Черный, как вороново крыло — **англ.** Black as a raven.

Eagle. ukr. Краще битися орлом ніж жити зайцем; **ukr.** Не вчи орла літати, а рибу плавати. **ger.** Den Adler fliegen lehren; **ukr.** Куди орли літають, туди сороки не пускають — **rus.** Куда орлы летают, туда сороки не достигают. Гордістю солов'я є його голос.

Nightingale. ukr. В кожного солов'я пісня своя, Соловей піснями ситий, При соловію і воробець співак; **ger.** Wo die Nachtigall singt, hört man Krähe nicht, Wo die Gänse schnattern, schweigt die Nachtigall, Was nützt dem Tauben die Nachtigall?

Linguocultural analysis of paremia can reveal the linguistic realization of the mental characteristics of the representative of linguistic culture, at the level of linguodidactics, cross-cultural communication makes it possible to study a particular linguistic (linguocultural) phenomenon in two or more cultures and has an additional value of comparison, comparison of comparable cultures.

Within the framework of the understanding of national mentality, linguodidactic discourse (scientific principles of lexicology and phraseology) should include out-of-context, contextual and linguocultural analysis with the partial application of *intercultural communication research methods* [19; 20; 21], which we interpret at the level of the vocabulary article as teratological settings, tactics of studying of the specifics of intercultural communication.

Conclusions

The analysis of verbal oppositions in the semantic field of lingodidactic terms allows us to state broad semantic paradigmatic relationships. The use of component analysis in the study of lingodidactic terminosystem revealed the features of reflection of the realities of objective linguocultural and socio-cultural reality, since the language reproduces the formation of the linguistic consciousness of representatives of a certain linguistic culture. The polysemy of the linguodidactic terms is the result of complex terminological processes in the system, the phenomenon of secondary nomination of a definitively defined concept, in relation to the extra-linguistic features of the terminology — the search for an optimal semantic adequacy, the direct connection of the semantics of the word with linguocultural discourse, and also the objective progress of psychological and pedagogical practice.

The foregoing allows at the level of codification of studied terms to talk about *the linguocultural lexicography* (within the competence — theoretical issues and the development of practical algorithms for the creation of linguistics in general, linguodidactic section — in particular).

The development of linguodidactics determines the development of thematic groups, new synonymous

range; range, which reproducing hyper-hyponomic, synonomic, polysemic relationships, patterns of compatibility of specific components. Linguodidactic terms undergo changes in its semantic structure, which consist of de-

velopment of both nuclear and peripheral components of basic semantic structure; expanding of the semantic structure; forming of terminological fields which are built on the integrative basis.

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NOMINATION OF PROCESSES AND ACTIONS IN THE SYSTEM OF NOUNS AND ADJECTIVES IN ANCIENT GREEK

Abstract

Objective: to study the processual vocabulary of Ancient Greek through identifying of peculiarities of its representation in lexico-grammatical classes of different types, analysis of principles of classification according to semantic characteristics, identifying of anthropocentric peculiarities of its forming.

Methods: comparison, generalization, observation, systemic analysis, data grouping, theoretical cognition, the method of analogy, component analysis.

Results: basing on new theoretical regulations of cognitive-discourse tendency of study in linguistics, applying the effective and informative method of component analysis of lexemes the processual vocabulary of Ancient Greek was studied. The central part of the work is taken by nominative vocabulary (nouns, adjectives) that along with verbs takes an active part in nomination of different types of processes in space and time aspects of their realisation. The factors of forming of lexemes of such type are analyzed. Psychobiological nature of a person is identified as a key principle. The connection between specific characteristics of the model of world typical to archaic way of thinking and their fixation in lexico-semantic system of Ancient Greek is determined.

Scientific novelty: for the first time on the basis of Ancient Greek the processual vocabulary was studied.

Practical significance: the main provisions and conclusions of the article can be used in scientific and teaching activities in Classical Philology, General Linguistics, typological studies of Indo-European languages.

Keywords: processual vocabulary; noun; adjective; space relationships; temporal relationships; lexico-semantic groups.

Introduction

A high status of the processual vocabulary in the language and peculiar attention of linguists to its studying is explained by its fixation of information about changes in the space and time that is important for a person. In this context it is noted by L. V. Varpakhovich that the situation of common cognition is first of all sensitive, perceptive realization of the object that is interpreted as a part of the process. A person takes a world that is constantly moving, that has no absolute statistics. That is why processual semantics objectivised in the body of the particular language meanings has a status of fundamental and system-forming part of cognition. Psychobiological principles of cognition support this statement as fundamental information that is a base for forming of more difficult knowledge is got through sensory and motor experiences that are connected with

the process of movement, changes of position and state [1, 57–59].

Actuality of the research of processual vocabulary of Ancient Greek depends on the one hand on exclusive importance of this group of words, and from the other hand on lack of deep research in lexical semantics of classical languages that would give a possibility to clear principles of comprehension of the environment by Hellenes and the specifics of such cognition of particular language signs.

Investigation

Due to new theoretical regulations of cognitive-discourse tendency of study in linguistics while describing each language phenomenon two functions should be taking into account that are necessarily realized by two language elements: cognitive (due to participation in the process of cognition) and communicative-discoursing

(due to participation in verbal communication acts) [2; 3; 4; 5; 6; 7; 8]. According to this a new explanation of such structural element of language as word was formed.

Cognitive approach allows to state that a word is a cardinal unite of language picture of the world, our inner vocabulary, and the connection of language picture of the world with the concept one is realized precisely through the word [9; 10; 11; 12; 13]. As Ch. Fillmore noted, «number of words that we use are similar to names of things and have such meanings, that are really cannot be mentioned without indication of knowledge about this things» [14, 89]. Generally speaking, «wording» of the world leads to more distinct ordering and stopping of thoughts in human consciousness. None-verbalized knowledge is distinct and not clear ideas and only having got language body of the sign becomes handy operative unites of cognitive processes. Due to N. V. Bardina «denotations as special object forms of the language replace in mental and discursive activity the most complex fragments of our thoughts about the world and conclusions of its comprehension» [15, 53].

Semantic component of the word, its meaning that makes «encyclopaedia information» throw open to human memory attracts attention of linguists at all the stages of linguistics thought development. One of the problematic questions is still the specifics of denoting to the word-representatives of different lexico-grammatical classes (parts of speech) particular conceptual structures that are oriented to different fragments of reality that is comprehended and verbalized by a person.

The main problem for contemporary researches of parts of the speech is which word's fragments and ontological matters are marked by them, which noetic spaces are covered by the words of different parts of speech. An important part is given to nominative activity of a person, anthropocentric nature of such activity and language-cognitive peculiarities. The representatives of onomasiological approach tried to explain the reasons of lexical knowledge variety that are due to certain common categories, found out the capacity and essence of knowledge about an object in a respective nominations, the possibility to unite groups of concept in the limits of one word [16; 17; 18]. Cognitive school gave these questions more depth and accuracy by connecting the answers with the experience gained by a person, men-

tal vocabulary and memory structures, different structures of knowledge and their existence in human conciseness, principles of word's perception [9, 140–141].

Such peculiarity of realisation of conceptual systems in language when the same meaning can be represented in the language by alternative means is important in this aspect [19, 313].

Alternative as necessity of choice between possibilities exists in social environment and is a workable norm of consciousness that is a feature of human existence. Covering all the spheres of every-day life it gets expression by unites of language of different levels [6, 377]. More difficult and meaningful for human process of thinking concepts are expressed by more difficult system of language means and forms, the variety of which is built, in particular, in the process of analogy, and on its base on metaphor. Moreover, according to G. Lakoff metaphors do not ruin, but develop the categories correspondently to which they act [20, 32].

Processual vocabulary that objects important for a human aspects of changes of objects in the space and time is represented in Ancient Greek by different parts of speech. Time changes are realized first of all by tense-aspect forms of verb. The peculiarities of changes in the space particularly marking of different kinds of movement is also verbalized by verb lexemes with specification of character of movement due to uniting the semantics of verb prefixes with preposition-case forms.

Signing the process of different kind and longevity is also possible by usage of nominative vocabulary — nouns and adjectives.

In Ancient Greek in functional-semantic field of space the meaning of processuality is realized in the groups of nouns that names objects (positive, negative, neutral dynamics — 791 lexemes as a whole):

1) positive dynamics (283 lexemes): ἀγωγή, ἡ brining, delivering; βολή, ἡ throwing, throw; εἰσβολή, ἡ intrusion, invasion; εἰσέλασις, ἡ onslaught, (tactical) attack; εἰσπλοος, ὁ (about ships) landing; ἥξις, ἡ coming, arriving; λήψις, ἡ prehensile movement, seizing; παράδυσις, ἡ entry, ingress, penetrateing, penetration; περίθεις, ἡ throwing; πρόοδος, ἡ movement ahead, advancement; προσανάβασις, ἡ ascent, rising, assault, storm; προσχώρησις, ἡ approaching, drawing near, com-

ing; συλλογή, ή gathering invasion, incursion, inroad; συνεγγισμός, ό approach, closing in, converging etc.

ή δέ εισβολή ήν όδός άμαξιτός όρθί αίσχυρως και άμήχανον εισελθείν στρατεύματι (Xen. Anab. 1.2.21) — thoroughfare entrance was exactly at right angle, so, obviously, the army managed to enter; έλών ούν από της Νισαίας πρώτον δύο πύργω προύχοντε μηχαναίς έκ θαλάσσης και τόν έσπλουν ές τώ μεταξύ της νήσου έλευθερώσας άπετείχιζε και τώ έκτης ήπειρου, ή κατά γέφυραν διά τενάγους έπιβοήθεια ήν τή νήσω ού πολύ διεχούση της ήπειρου (Thuc. Hist. 3.51.3) — taking over two prominent guard towers at the island in front of Nisaea by using vehicles from the sea, he made the way to the bay between the islands and the continent, strengthened the area nearest to the continent by the wall, where by using the bridge they can help the island;

2) negative dynamics (258 lexemes):

ανάδοσις, ή detachment, coming out; άπαλλαγή, ή separation, parting; απόβασις, ή landing, debarkation, disembarkation, putting ashore, descent; απόδοσις, ή returning, return, coming back διαίρεσις, ή separation; διάρριψις, ή scattering; έκδημία, ή ban, ejection, exile, expulsion, proscription, relegation; έκδυσις, ή exit; έκτροπή, ή leading away, taking aside, withdrawal, κατάβασις, ή descent; ύποτροπή, ή retreat, withdrawal, retirement, falling back, βίαχιά φυγή, ή escape, getaway;; χωρισμός, ό separation, ποζαία, departure; leaving, setting off etc.

διά γάρ τώ στενήν είναι την όδόν όλην την ήμέραν ή ανάβασις αύτοίς έγένετο και κατάβασις (Xen. Anab. 4.1.10) — ascent and descent took the whole day; από γάρ τού όρεος ή κατάβασις συντομωτέρη τέ έστι και βραχύτερος ήπερ ή περίοδος τε και ανάβασις (Hdt. Hist. 7.223.1) — as descent is faster and shorter than roundabout way or ascent (Thuc. Hist. 2.81.6) — the other barbarians saw them and ran away without waiting;

3) neutral dynamics (250 lexemes):

άγών, ό fight, competition; αιώρα, ή rocking; swinging; άκολουθία, ή escorting, convoy; άλη, ή wandering, roaming, roving, travelling; άλοητός, ό threshing; άντισήκωσις, ή balancing; βάσις, ή movement. Move., walking; διαδρομή, ή fuss, bustle; clutter; flurry; turmoil, ado, huddle; rumpus; δρόμος, ό bir; ήλυσις, ή walking, move, movement; κίνησις, ή move, movement; κύλισις, ή circuit, gyre; όδός, ή move, movement, trip, travelling;

όρχημα, τό dance; πλάνη, ή wandering, roaming, roving, travelling; χορός, ό chorus, round dance zi cπibom etc.

τόν δέ άγώνα ούκ έν τώ κόλπω έκών είναι ποιήσομαι ούδ' έσπλεύσομαι ές αύτόν (Thuc. Hist. 2.89.8) — as much as it depends on me I will not give a fight in the bay and will not go there; άλλ' ένεκ' ούλομένης γαστρος κακά κήδε' έχουσιν άνέρες, όντιν' ίκηται άλη (Hom. Od. 15.343–344) — people suffer from hunger when they have to travel; οί δ' αιεί έθέλουσι νεόπλυτα είματ' έχοντες ές χορόν έρχεσθαι (Hom. Od. 6.64–65) — they want to go to our round dances in clean, washed dresses.

Functional-semantic field of time contains a big group of nouns with the meaning of long processes and actions, one- or multi-act actions (total number is 3054 lexemes):

1) long processes (1714 lexemes):

άγκιστρευτικόν, τό fishing; άκεσις, ή healing, recovery, curing, άλειψις, ή rubbing the oil into the skin; δόλιχος, ό a long distance race; δρόμος, ό running, forced march, forced march, running contest; έργον, τό business, affair, work; ιστορία, ή study, research; έξοδος, ή solemn procession, άγωγή, ή leading, running, movement, move; shift άθροισις, ή meet, meeting, gathering; άλητεία, ή travelling wandering, roaming, roving, βάδισις, ή walking, walk, gait, step, tread; βλάστησις, ή growing, growing up; δίωξις, ή pursuit, chase; έμπορία, ή the trip with the commerce aims, trading; ζήτησις, ή searching, search; πλύσις, ή washing, laundering etc.:

χρόνος έστιν έν ώ καιρός, και καιρός έν ώ χρόνος ού πολύς: άκεσις χρόνω, έστι δέ ήνίκα και καιρώ (Hp. Praec.

1) — there is a proper moment in time, and in a proper moment there is a short period of time; healing can be gained through the time, but sometimes through proper time.; άλλ' ότε δή πύματον τέλεον δρόμον ώκέες ίπποι άψ έφ' άλλος πολιής, τότε δή άρετή γε έκάστουφαίνετ', άφαρ δ' ίπποισι τάθη δρόμος (Hom. Il. 23.373–375) — but when the horses had already returned to the last boundary at the gray seaside, courage arose in everybody, and hoses started running faster; όλίγη τε χρέονται βαδίσει κατά την πόλιν και τώ έμπόριον, αλλά μονοξύλοις διαπλέουσιν άνω και κάτω: διώρυγες γάρ πολλαί εισι (Hp. De aer. 15) — they rarely go to cities and markets, but go up and down in the boats made from one tree, as there are a lot of channels there;

2) one-act actions (1179 lexemes):

κράτος, τό winning, victory; αναπνοή, ή inhale, breath; επέκπλοος, ό battle fleet operation, see attack; πρόσοδος, ή attack, invasion, conquest; αἵρεσις, ή conquest, gaining; ἄλμα, τό a hop; ἀφή, ή a touch; βήμα, τό a step; δῆξις, ή a bite, a prick; κόνδυλος, ό punch; κοπή, ή stroke, collision, λαβή, ή invasion, obtaining; μάστιγμα, τό lash; ράπισμα, τό stroke, slap; ριπή, ή throw; σκίρτημα, τό hop; σχισμός, ό break-off; κατάλυσις, ή dissolution, stopping ceasing; μεταπήδησις, ή jumpung, hop; σύρραγμα, τό collision etc.:

ή δὲ βασιλεὺς αἵρεσις ἐς τὴν ὑστέρην τὴν Μαρδονίου ἐπιστρατηγὴν δεκάμηνος ἐγένετο (Hdt. Hist. 9.3.2) — the first conquest of the city by the tsar had happened two months before Mardonius' invasion. ὅσση δ' αἰγανέης ριπὴ ταναοῖο τέτυκται, ἦν ῥά τ' ἀνὴρ ἀφείη πειρώμενος ἢ ἐν ἀέθλω ἢ ἐν πολέμῳ διτῶν ὑπο θυμοραϊστέων, τόσσοι ἐχώρησαν Τρῶες (Hom. Il. 16.589–591) — Trojans passed as far as the throw of a long dart when a man let it out to see his strength during the competitions or during the battle with the enemy-blighter; ἐν τούτῳ τῷ χρόνῳ ἰόντας ὡς ἀλλήλους πρέσβεις καὶ κήρυκας ποιεῖσθαι τοὺς λόγους, καθ' ὅτι ἔσται ἡ κατάλυσις τοῦ πολέμου (Thuc. Hist. 4.118.13) — at the time of armistice each part should send its ambassadors and messenger with the propositions about cessation of hostilities;

3) multi-acts actions (161 lexemes):

ἄελλα, ή fast twisting, turning round, whirling; αἰώρησις, ή rocking; swing (ing); ἀμαρυγή, ή winking, blinking, flicker, glimmer, gleaming, twinkling; δόνημα, τό heaving, waving, rocking, swinging, tossing, shaking; δορατισμός, ό spear throwing from the both side, shooting (fire, firing) from the both side, shooting; εἰρεσία, ή rowing, canoeing, paddle, paddling, measured movement; κέντησις, ή pricking, tingling; κνήσμα, τό scratching; κόνις, ή sprinkling of sand over the body; κοπετός, ό beating oneself into the chest, lamentation; κύλισις, ή turning round, whirling; πέτρωμα, τό beating with stones; ῥάβδωσις, ή laying of channels; ριπτασμός, ό nervous moves, fuss, bustle; clutter; flurry; turmoil, ado, huddle; rumpus; ὑδρεία, ή water drawing up; ψηλάφησις, ή palpation; touching etc.:

δοκεῖ γάρ μοι ὁ παλαιὸς μῦθος καὶ Πρωτέα τὸν Αἰγύπτιον οὐκ ἄλλοτι ἢ ὀρηστήν τινα γενέσθαι λέγειν,

μιμητικὸν ἀνθρώπων καὶ πρὸς πάντα σχηματίζεσθαι καὶ μεταβάλλεσθαι δυνάμενον, ὡς καὶ ὕδατος ὑγρότητα μιμῆσθαι καὶ πυρὸς ὀξύτητα ἐν τῇ τῆς κινήσεως σφοδρότητι καὶ λέοντος ἀγριότητα καὶ παρδάλως θυμὸν καὶ δένδρου δόνημα, καὶ ὅλως ὅτι καὶ θελήσειεν (Luc. Salt. 19) — As a whole, I consider that an ancient legend about Egyptians by Proteus means the only thing, that is he was one of the dancers, a person with a gift to show humidity of the water, fervency of the fire with its strength, the anger of the lion, rage of the ounce, tree swinging and whatever he wanted; ἦν δὲ δορατισμὸς τὸ πρῶτον, εἶτα ἐν χεροῖν γενόμενοι μετὰ τέχνης ἅμα καὶ βίας ἐχρῶντο τοῖς ξίφεσι (Plut. Pyrrh. 7.5) — first they throw spears, and then fought hand to hand with swords as persistent as skilfully; συνεκόμισαν δὲ τὸν Στέφανον ἄνδρες εὐλαβεῖς καὶ ἐποίησαν κοπετὸν μέγαν ἐπ' αὐτῷ (NT. Act.ap. 8.2) — devotees buried Stephen and mourn for him fittingly.

The studied lexico-semantic subgroups are the most numerous in their groups (almost 50% of improperly-space nouns have the meaning of movements and 49% of improperly-temporal nouns indicate the process and the action of different type).

Object characteristics as to processes of movement, shifting with marking the way, environment, the way of shifting etc., are fulfilled with the help of adjectives. In Ancient Greek such adjectives belong to lexico-semantic groups of orientation adjectives and make a quite numerous sub-group. (495 lexemes): ἀεροπόρος the one rush in the air; ἀκρόπλους the one, floating up; ἀλίπλαγκτος the one travelling by sea; ἀεικίνητος the one who is in a constant move ἀεροδόνητος the one floating in the air; ἀλίπλωος the one sailing the sea; τοπικός the one changing in the space; αἰολόπωλος the one rushing on fast horses, προβλής the one coming forward; προκέλευθος the one coming ahead; ἀγάρροος the one flowing fast and heavily; ἀμφιστροφής the one moving to all sides; ἀνακρουστικός the one pushing back; διάδρομος the one running back and forth; ἐρπυστικός the one who creep, crawl; πλανητός the one coming forward who is roaming, wandering, travelling.

ἐνθα ἶδον πλείστους Φρύγας ἀνέρας αἰολοπώλους (Hom. Il. 3.185) — I saw Phrygians army, it was rushing on the fast horses; αὐτὰρ Θρήϊκας ἤγ' Ἀκάμας καὶ Πείροος

ἥρωες ὅσους Ἑλλήσποντος ἀγάρροος ἐντὸς ἔργει (Hom. Il. 2.844–845) — Thracians were headed by *Akamas and Piros, the hero, their countries are embraced by the Hellespont that flows fast and heavily*; φαμὲν αὐτὰ οὐδέποτε τὴν αὐτὴν ὁδὸν ἰέναι, καὶ ἄλλ' ἄττα ἄστρα μετὰ τούτων, ἐπονομάζοντες πλανητὰ αὐτὰ (Plat. Leg. 7.821 b.) — we say that they never move by the same way as well as some other stars, that is why we call them wandering.

Adjectives with the meaning of dynamic shift in the space also dominate in their semantic group that is absolutely correspondent to the quantity of the nouns in lexico-semantic group of nouns of improperly-space semantic, where substantives with the meaning of move are dominant.

Conclusion

The analysis of quantitative and quality structure of noun and adjective groups in Ancient Greek indicates their active part in representation of different aspects of processuality, concrete definitions of types of movement, moving in the space and time measuring.

It is also important to note that processual vocabulary of Ancient Greek is characterized by variety of world-building structure. High derivative potential of verbs, nouns and adjectives is an evidence of wide possibilities of storage of much information about different types of processes in their space and time characteristics. Study of semantic-word-building structure of the processual vocabulary in Ancient Greek is an actual and perspective line of research.

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LIBERAL EXTREMISM AS A FACTOR IN THE GROWTH OF AMERICAN CONSERVATIVE NATIONALISM 2016–2017

Abstract

Objective: To establish the relation between extremist liberalism and the growth of conservative nationalism in the United States from 2016–2017.

Research method: Historical analysis, critical discourse analysis and logical method.

Result: The analysis of two signature currents of the liberal movement in the U. S. like third wave feminism and gender ideology and the extremization of some of its members provides a different approach to the understanding of the growth of extremist conservatism and nationalism. Sectors of the society that for years, have been neglected and sometimes ashamed for who they are, reaching the point of censorship by the then dominant ideology, started to reveal against who they considered was stripping them off of their identity. An extremist liberal discourse that attacks those who disagree or who simply are different, should be moderate by other members of the movement. Liberalism, in its currents of extremist feminism and gender ideology can be partially responsible for the perceived growth of extremist conservatism and nationalism in the U. S. seen in 2016–2017.

Scientific novelty: the growth of conservative nationalism in the US has not been deeply explored having the possibility of extremist liberalism as its source that pushes conservatism to extremism.

Practical significance: this research can be used in areas of policy making and security that prevent the extremization of the population and dealing of violent groups' activities.

Keywords: Extremism, United States, nationalism, conservatism, liberal extremism.

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ЛИБЕРАЛЬНЫЙ ЭКСТРЕМИЗМ КАК ФАКТОР РОСТА АМЕРИКАНСКОГО КОНСЕРВАТИВНОГО НАЦИОНАЛИЗМА 2016–2017 гг.

Аннотация

Цель исследования: Установить связь между экстремистским либерализмом и ростом консервативного национализма, наблюдаемого в США с 2016 по 2017 год.

Методы исследования: Исторический анализ, критический анализ дискурса и логический метод.

Результаты: Анализ двух сингулярных токов либерального движения в США, как феминизм третьей волны и гендерная идеология и экстремизм некоторых его членов, представляет иной подход к пониманию роста экстремистского консерватизма и национализма. Секторы общества, которые в течение многих лет игнорировались и иногда стыдились за то, кто они, Достижение цензуры тогдашней господствующей идеологии, начали

раскрыть против того, кто, по их мнению, стягивал их от своей идентичности. Экстремистский либеральный дискурс, который атакует тех, кто не согласен или просто отличается, должен быть умерен другими членами движения. Либерализм, в его течениях экстремистского феминизма и гендерной идеологии, может частично отвечать за рост экстремистского консерватизма и национализма в США в 2016–2017 годах.

Научная новизна: Рост консервативного национализма в США еще не изучен глубоко с экстремистском либерализмом как источником что еще больше подталкивает консерваторов к экстремизму.

Практическая значимость: Это исследование может быть использовано в областях разработки политики и безопасности, которые препятствуют экстремизации населения, а также относятся к деятельности насильственных групп.

Ключевые слова: Экстремизм, США, национализм, консерватизм, либеральный экстремизм.

7 ноября 2016 г. можно считать точкой отсчета в изменении не только администрации президента США, но и коллективной идентичности населения Соединенных Штатов, которая с тех пор делится на две группы в противоположных крайностях. У этих групп есть свои собственные идеалы, ценности, принципы и цели для страны, которые, можно сказать, тяготеют к тому, что представляет собой 45-й президент США. С одной стороны, есть те, кто поддержал его с самого начала его объявления в качестве претендента на пост президента в 2016 году, это очень разнородная группа, которая не ограничивается бедной и необразованной религиозной срединной американцев, а распространяется на других членов общества в разных регионах страны. С другой стороны, мы видим тех, кто идентифицирует себя как либеральные и прогрессивные с северо-восточного и западного побережий и обычно с высшим образованием. По своим характеристикам обе группы кажутся естественными врагами, которые в период с 2016 по 2017 год попали в острый конкурс на Белый Дом в физическом и виртуальном мире, иногда с кровавыми столкновениями. Независимо от усилий либералов, кандидат, представлявший интересы консерваторов, победил на выборах и, несмотря на то, что не смог выполнить обещания, которые он сделал, его победа дала его хардкорным последователям, законность совершения преступных действий против меньшинств, ставят под вопрос легитимность науки и фактов, аплодируют подъему европейского этноцентризма и так называемого «белого» национализма.

Но как получилось, что в стране, где в ходе предыдущей администрации 2009–2017 гг. был достигнут такой значительный прогресс в социально-экономи-

ческой сфере, обратился в противоположную сторону? Пытаясь ответить на этот вопрос, потребуются проанализировать национальную политику администрации Обамы, но для этого исследования будет изучен критический анализ культурного либерализма и, более конкретно, гендерной идеологии и радикального феминизма (третьей волны) как сил движения, которые формируют политику, как на национальном, так и на международном уровне. Это исследование не направлено на дискредитацию феминистского движения или гендерной идеологии как пути достижения гендерного равенства в американском обществе, оно скорее нацелено на критику экстремистской позиции некоторых членов феминистского движения 3-й волны и сторонников гендерной идеологии, которые принимают к их идеям до крайности, не рассматривая тех, кто имеет разные ценности. Чтобы установить связь между либеральным экстремизмом и усилением американского консервативного национализма, необходимо начать с определения экстремизма.

По данным Управления Академического Района Города Москвы, экстремизм определяется следующим образом:

Это приверженность к крайним взглядам и действиям, радикально отрицательным. Базовой основой экстремизма является агрессивность, наполненная каким-либо идейным содержанием (смыслом) [1].

Ключевыми понятиями экстремизма являются «точки зрения» и «действия», которые противостоят двум другим понятиям: «социальным нормам» и «правилам». Агрессивность является важным элементом экстремизма, хотя это напрямую не приводит к насилию. Точки зрения и действия экстремиста

обычно выражаются с агрессивностью, пытающейся навязать свою точку зрения другим. К сожалению, усилия по определению «либерального экстремизма» не многочисленны среди ученых и, следовательно, не могут быть перечислены. В предлагаемом определении социального либерализма здесь, исключая либеральную экономику, включает социально-политические ценности, которые влияют на жизнь человека конкретно через гендерное неравенство и социально сконструированные роли, которые, будучи успешно стерты, могут освободить угнетенных женщин, этнических и сексуальных меньшинств от патриархата доминирован белыми гетеросексуальными мужчинами. Гендерное равенство может быть достигнуто с помощью предлагаемой «гендерной идеологии», которая, согласно Миранде-Новоа, сводится к следующему:

Человек рождается сексуально нейтральным, а затем социализируется как мужчина или женщина. По этой причине предлагаются разные формы пола, которые зависят от сексуальной ориентации, такие как гомосексуальность, лесбиянка, бисексуал или транссексуал, приравнивая их к гетеросексуальности.

Поэтому, согласно личным предпочтениям, каждый человек строит себя в своей биографии независимо от их биологического пола и социокультурного контекста, в котором они живут [2].

Гендерная идеология является одним из основных положений, которые использует социальный либерализм для достижения своей цели равенства не только между мужчинами и женщинами, но и сексуальными меньшинствами, а также из-за принципа борьбы с доминирующей властью над угнетенными, расовыми группами. Исходя из этого, либералы, которые следуют этой концепции, пытаются деконструировать гендерные роли, чтобы устранить социально обусловленные различия между мужчинами (угнетателем) и женщинами (угнетенными). В еще глубоко религиозном обществе, основанном на ценностях протестантского христианства, значительная часть американского народа не был готов к такому столкновению идей по гендеру, которые противоречили установленному пониманию. Вскоре они столкнулись с постмодернистской активностью, которая агрессивно указала пальцем на самых устойчивых к изменениям, тех, кто назвал себя «кон-

серваторами». Следовательно, должно проанализировать всю концепцию «американского консервативного национализма», для этого необходимо разложить это понятие на три части.

Первая часть, определение того, кто или что такое американец, должен не только исследовать расовый профиль человека или их генеалогического древа, чтобы доказать, какой из них является американским, но он должен включать более качественные характеристики, такие как общая идентичность, которыми гордятся американцы желающих продолжать через поколения, является эффективным и уникальным (Брэквел, цитируется в Дэвайн-Райт) [3]. Общая идентичность приходит с способностью идентифицировать другого, чтобы мы могли идентифицировать себя. Определение того, что является американской идентичностью, является сложной задачей из-за многокультурного состава страны, но можно определить, каковы основные ценности Америки: свободы, равенства и индивидуализма [4]. Второе определение, консерватизм в его социологическом измерении, можно сказать, это «идеология или конкретная политическая программа социальной группы, пытающейся удерживать свои привилегии» [5], поэтому консерватизм может существовать только в том случае, если есть какая-либо попытка изменить установленную модель. Национализм представляет собой «институционализацию одной определенной этнической идентичности путем присоединения ее к государству» (Ворсли цитируется в Умэн) [6]. При этом мы можем заключить, что американский консервативный национализм является идеологией этнической группы, которая идентифицирует себя с набором ценностей, считающихся традиционными и под угрозой, боясь потерять свою этническую идентичность и власть, как большинство, они усиливают ее посредством контролируемых ими учреждений. От феминистского подхода национализм можно рассматривать как мужское понятие, поскольку он вводит силу, доминирование и власть одной группы над другой.

Процесс, предложенный гендерной идеологией для деконструкция установленных гендерных ролей, чтобы лишить власть доминирующего, может быть сопоставим с идеей советского человека, который был

лишен своей национальной принадлежности, религии и других аспектов, которые могли бы отвлекать их от работы для себя и общего блага Советских людей [7]. Как Советский Союз исчез, идея советского человека тоже изменилась, и начали межэтнических конфликтов между нациями, которые были частью Союза, когда все они начали искать новую идентичность или вернуть потерянную ими, и это поставило их расхождением с другими национальными группами. На Западе нет сопоставимого события по отношению к распаду Советского Союза в отношении либеральной социально-политической модели, но можно обратить внимание воспринятую идею об *исчезновении западной цивилизации с христианскими корнями*, которая в соответствии с консервативной риторикой, ценит свободу слова и находится под нападением иммигрантов, особенно мусульман, которые происходят из более авторитарных режимов и где женщины в некоторых случаях угнетены и не имеют права голоса. Дискурс, продвигаемый нынешним президентом США, связывал ближневосточных иммигрантов и беженцев с преступностью и мог бы добавить еще один вес в уже противоречивую американскую идентичность «кто мы?» [8]. Больше страха и гнева среди американского народа создавали экстремистские сайты и консервативные новостные каналы, которые утверждали, что исламизация Европы реальна. Это вызвало поиск американской идентичности, возвращение к традиционным ценностям, основанным на христианстве, и «старой» Америке, давно забытой либералами, которые сформировали новый общественно-политический спектр, не считая голосов тех, кто их долго угнетал, превращаясь в новых угнетателей [9].

Гендерная идеология и феминизм третьей волны связаны в этом процессе, так как деконструкция установленной социальной парадигмы по гендерному признаку, которую они способствуют достижению равенства, была направлена на то, чтобы взять власть у воспринимаемого доминирующего актера «белого гетеросексуального мужчины», через процесс «демаскулинизации» чтобы привести его к статусу женщины в обществе. «Демаскулинизация» следует понимать двояко: 1) от умеренного феминистского подхода, лишения доминирующего «белого гетеро-

сексуального мужчины», чтобы предоставить место доминирующим этническим группам, женщинам и сексуальным меньшинствам в принятии решений, и 2) от экстремистской гендерной идеологии и феминизма, как фактическое стирание социально сконструированных мужских атрибутов, физических и поведенческих, чтобы расположить их на уровне этнических групп, женщин и сексуальных меньшинств. Это аналог феномена, которому женщины подверглись в XX в. для достижения равного с мужчинами статуса, им приходилось брать мужские роли (маскулинизация), что, возможно, способствовало росту феминизма третьей волны.

Гендерная идеология была центром дискуссий не только внутри США, но и в Евросоюзе, а в последнее время и в Латинской Америке. Его критикуют за попытку деконструировать социальные роли, установленные для мужчин и женщин, независимо от их культурной самобытности. Внутри США этот дискурс поляризовал нацию дискуссиями о политике включения трансгендерных и транссексуальных детей и возможностями использовать ванную комнату в школах, соответствующую тому гендерному признаку, который они идентифицируют себя, который позже был воспроизведен другими организациями, такими как рабочие места и супермаркеты. Это произошло после того, как администрация Обамы одобрила однополый брак на федеральном уровне летом 2015 года, вызвав всемирную реакцию активизации ЛГБТ-сообщества и негативную кампанию против правительств, которые не соответствовали этим принципам. Это событие осуществило распространение политического дискурса, начатого президентом Обамой, который трансформировался в общественный дискурс через социальные сети и попал в аудиторию в страны, где они могли принять эту победу в качестве причины политической активности, поскольку точка зажигания потребовала бы смена правительства.

2009–2017 годы были периодом социальных побед за включение этнических и сексуальных меньшинств и прав женщин. Наконец, доминирование преодолело социально построенную систему угнетения и во многих отношениях позиционировалось на равном уровне с угнетающим «белым гетеросек-

суальным мужчинам», хотя в таких областях, как рабочее место или политика, сохраняются неравные возможности. Тем не менее в настоящее время это не только затрагивает группы женщин, этнических или сексуальных меньшинств, поскольку эти новые доминирующие субъекты в попытке создать более равноправное общество начали имитировать практику, которую они долго обвиняли, примерами этого могут быть системы квот на рабочем месте, где компании нанимают одинаковое число женщин и мужчин, в некоторых случаях, в ущерб системе, основанной на достоинствах и опыте, затрагивающих мужчин всех этнических и сексуальных групп, и доводить их до крайности либеральной парадигмы. То же самое относится и к университетским квотам, которые благоприятствуют этническим группам в отношении американцев европейского происхождения. Не должно путать, это великие практики включения и расширения прав и возможностей меньшинств и женщин, но если дойти до крайности и игнорировать достоинства и опыт, это способствует созданию чувства среди «белых людей», которые являются гражданами второго сорта и дискриминируются только за их врожденный статус и подталкивают их к экстремизации.

Продвижение экстремистских идей в феминизм третьей волны, вдохновленное дискурсами ненависти и нежеланием признавать и мужчин, и женщин, живут под репрессиями элит, уступило место распространению мизандрии. Этот дискурс был вокруг самых экстремальных членов феминистского движения, которое можно проследить до 60-х годов с манифестом S. C.U. М. Валери Соланас, где она описала мужчин как «биологическую аварию ... неполную женщину, ходячий аборт ...» [10]. Этот тип мышления, отраженный сегодня в самых экстремальных кругах

феминисток, которые считают всех мужчин потенциальными насильниками, или все мужчины выиграли от системы, а жизнь проще, просто потому, что они мужчины, ничего не делает, кроме как повредить феминистскому и либеральному движению [11]. Это может объяснить появление фигур такого как Мило Яннопулос, который, несмотря на то, что он гомосексуален, выступает против феминизма в экстремистском альт-правом движении.

Необходимо задать вопрос, мы радикализируем людей с помощью экстремистского либерального дискурса? Как далеко продвинулась реализация либеральной повестки дня без учета мнения умеренных и консерваторов? Признавая, что общество не является статичным, а его ценности построены в социальном плане, но если одна сторона слишком сильно и настойчиво продвигает его пользу, игнорируя или подвергая цензуре мнение другого, это создаст обратную реакцию с контрдвижением, которое либо попытается либерализовать общество от государственного контроля или установить контроль над воспринимаемым социальным беспорядком. В этой борьбе против роста национализма следует рассмотреть вопрос о пересмотре ценностей гендерной идеологии и пропаганды третьего волнения феминизма. Власть и господство являются компонентами национализма, и в то же время эти два понятия характерны для мужского поведения. Если общество хочет остановить рост национализма, то должно остановить рост экстремистского движения мужчин, реагирующего на экстремистский феминизм, прислушиваясь обе стороны угнетателем и угнетенными, чтобы сформировать эгалитарное общество с одинаковыми возможностями независимо от гендерных ролей, пола или этнического происхождения.

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DOI: <http://dx.doi.org/10.20534/AJH-17-5.6-53-59>I. S. Blahun¹H. V. Leshuk²¹*Vasyl Stefanyk Precarpathian National University, Ivano-Frankivsk, Ukraine*²*Transcarpathion institute them. Hrushevsky Interregional Academy of Personnel Management, Lviv, Ukraine*

PROBABILISTIC AND STATISTICAL METHODS OF RISK ASSESSMENT OF INVESTMENT PROJECTS OF A REGION

Abstract

Objective: the article deals with the research of the peculiarities of the probabilistic and statistical methods of evaluation of investment project risks in the economic space of a region.

Methods: comparison, generalization, systemic analysis, theoretical cognition.

Results: the main advantage of probabilistic and statistical methods is that fact, that the measurement of risk is carried out using objective measures — standard deviation and coefficient of mutability. However, these methods have certain disadvantages, in particular the necessity of making a large number of assumptions and the difficulty of estimating the probability both as net cash flows, and individual scenarios.

Using the proposed approach to risk factor assessment in the evaluation of the effectiveness and feasibility of investment projects in a region, an investor can exercise an informed choice of the best of them. This will increase the degree of validity of the investment decision-making, reduce the probability of deterioration in the financial condition of the potential investor, and will improve the relationship between risk and expected return of investment projects in the economic space of a region.

Scientific novelty: the author proposed to apply a method of net present value, while make the calculations of the expected net present value, standard deviation, and shift factor during probabilistic and statistical estimation of the risks of investment project.

Practical significance: the conceptual basis of probabilistic and statistical estimation of the risks of investment project in a region are formed.

Keywords: Probabilistic and statistical methods; Investment projects; Risks; Region.

Formulation of the problem

Planning and implementation of investment projects in the economic space of a region is associated with the influence of various risk factors, the degree of influence of these factors had risen sharply during the financial

and economic crisis and post-crisis period at the domestic economy. A modern economic risk has the following features: its totality, inclusiveness, therefore, economic risk refers to the fundamental definitions of modern economic theory and investment analysis. Based on general

economic theory, system analysis, economic and mathematical methods and models, riskology has formed its own theoretical and methodological principles, summarized a powerful and flexible tool that finds more and more wide practical use in all spheres of economic and investment activities. In practice quantitative evaluation of risks of investment projects, which is determined by the absolute or relative size of financial losses that threaten the potential investor in case of occurrence of risk events has important role. At the same time, quantitative risk evaluation is objective, since it is based on a specific statistical basis.

Analysis of recent research and publications.

Theoretical and methodological bases of identification of investment risks in order to minimize them the following scientists investigated: D. A. Krasovskiy, O. P. Logvinova, R. Y. Mokrydin, R. V. Tuchyn, V. V. Tsarev, V. M. Glibchuk, Mayorova T. V., Glushevskyy V. V., Kyrychenko O. A., A. Blanka, F. Nayta, A. Kayna etc. The research of the problems of quantitative assessment of economic risks devoted the work of: O. Yastremsky, N. Mashina, M. Sulima, A. Leschynskyy, N. Kravchuk, I. Ivchenko, A. Kaminskyy, O. V. Pylypyak, L. P. Shvets, N. P. Zakharkevich etc. After analyzing the scientific research according to theoretical and methodological bases of identification of investment risks and peculiarities of quantitative analysis application it is worth to mention the following:

In the scientific literature, probabilistic and statistical methods (probabilistic risk analysis PRA) are based on an extended evaluation of critical cash flows that is carried out using sensitivity analysis. These methods mitigates the main drawback of sensitivity analysis — its deterministic character.

O. V. Pylypyak, L. P. Shvets, N. P. Zakharkevich note that the statistic and probabilistic method of risk assessment based on analysis of fluctuations of the estimated parameter over a specified period. The income, gross profit, net present value or net cash flow are used as such estimated notions in investment analysis. The use of statistic and probabilistic method can be carried out in two directions: with the use of the probabilistic assessments; without taking into account probabilistic estimates [1, P. 236].

Probabilistic and statistical approaches to risk assessment involve the use of criteria such characteristics of positive random variables (magnitude of damage), as: mathematical expectation; dispersion; average deviation; coefficient of variation (standard relative deviation, which is defined as the standard deviation, divided into mathematical expectation, that is, the standard deviation, expressed in fractions of the mathematical expectation); a linear combination of mathematical expectation and standard deviation; the mathematical expectation of the loss function, etc [2].

As Boot T. V. noted, using the statistical method based on the calculation of dispersion, standard deviation and coefficient of variation it is possible to assess the development of the regional economy. However, statistical methods do not provide estimates of the development in conditions of limited information [3, P. 6].

Setting the objective.

The purpose of this article is a theoretical and methodological research of the conceptual foundations of probability and statistical (probabilistic risk analysis PRA) risk assessment of investment project in a region. The objective of this research will be based on the selection of the features of applying the method of net present value, simultaneously the calculations of expected net present value, standard deviation, and shift factor.

The basic material of research

In probabilistic and statistical methods net cash flows are determined probabilistically, it means that there is a definition of several possible options, and assignment a certain probability of occurrence, which allows to measure a risk using statistical measures of dispersion [4–9]. Thus, these methods are based on probability and static measurement of risk, as well as on defining a risk as the possible deviation from the expected values, in this case — from the result of the implementation of the investment project in the economic space of a region, which is measured using different evaluation methods of efficiency of investment projects. The risk of the investment project can be determined by measuring the dispersion of possible outcomes around this central value, which in the concept of risk an expected value is.

In relation to the economic objectives the methods of probability theory are reduced to the determination

of the probability values of the events and the choice of possible events to the most desirable scenario, based on the highest values of mathematical expectation, which is equal to the absolute value of this event, and multiplied by the probability of its occurrence. The degree of risk is measured by two indicators: the average expected value and fluctuations of its possible outcomes [9, P. 31–32].

The dispersion of a random variable and standard deviation that are the measures of dispersion of ran-

dom variable around the average value, often used as indicators of risk associated with certain investment project. The higher values of dispersion, the higher are the risk. As a risk measure in the framework of probabilistic and statistical methods, coefficient of mutability is also applied, which is a relative measure that allows to compare the risks of several investment projects. Thus, conducting probability and statistical estimation of risks of investment project in a region should be based on relevant conceptual aspects (Fig. 1).

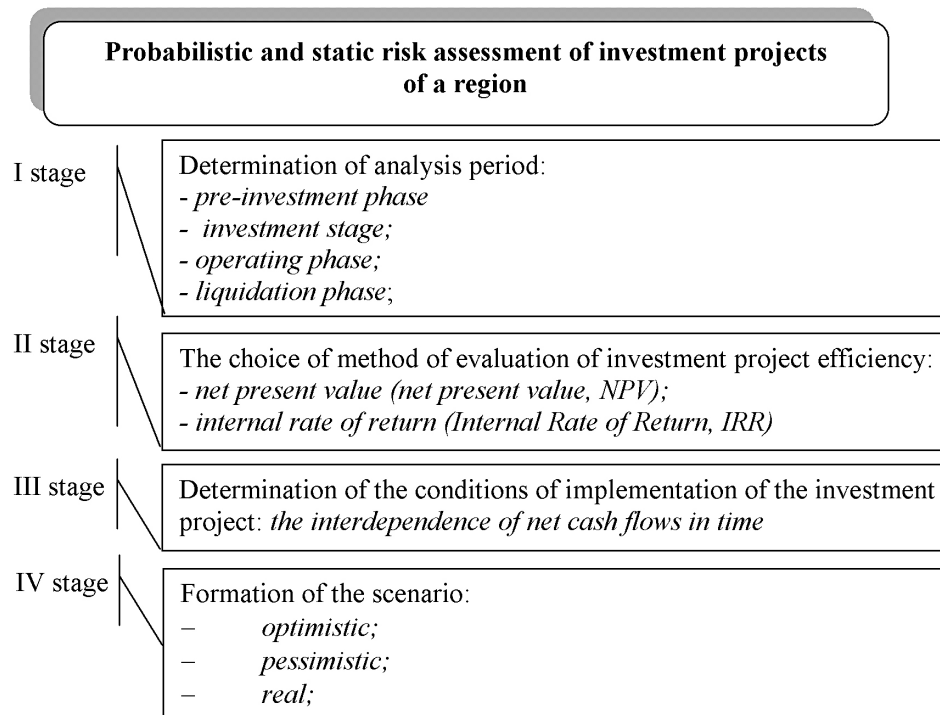


Figure 1. Conceptual basics of probability and statistical estimation of investment project risks in a region

In probability and statistical estimation of risk of investment projects it is necessary to apply the method of net present value, while calculations of NPV are treated as random variables, for which it is possible to set the probability of their display. Based on this expected net present value $E(NPV)$ is calculated, which is the absolute decisive criterion for a certain investment project. If the value of $E(NPV)$ is greater than or equal to zero, then the project is effective. The scale of the risk associated with this project is defined by the standard deviation value $\sigma(NPV)$ and coefficient of mutability $C(NPV)$, calculated on its basis, thus the lower is the value, the lower is the risks. Relative over-

whelming criterion, based on the proposed statistic value, is based on maximizing the value of $E(NPV)$ and minimize standard deviation. However, investment projects with a high expected value and are also characterized by higher values of dispersion, and it leads to the fact that additional indicator, which will identify the risk, which falls per unit of expected value, is required for unambiguous assessment. Coefficient of mutability executes this function. Among the considered options project, which has the lowest coefficient $C(NPV)$ is the best.

To evaluate expected value and risk of the investment project it is necessary to set the probability distribution for the explanatory variables that determine the amount

of net cash flows. For each explanatory variable, it is necessary to set the probability distribution of the formation of its certain size at a certain expected level. This distribution can be established on the following basis: research that are conducted with the aim of obtaining an experimental data; theoretical distributions, which correspond to the researched case; heuristic methods that use experience, intuition and subjective opinions of experts [5].

Time to time in practice, despite the lack of data with respect to the probability distribution, a certain simplification is using, which mainly leads to the definition of the possible states for each accepted explanatory variable, and to determining the probability of its receipt. Calculation of the NPV for three different scenarios: optimistic, pessimistic and most realistic (average), the probability of which it is possible to determine, for example, as: 0.50 — for the most real and 0.25 for optimistic and pessimistic, can be an example. However, the application of limitation to three main scenarios (optimistic, realistic and pessimistic) are burdened by serious disadvantages. Only a few separate variants of the project are taken into account and it is assumed that the uncertain variables are correlated (all variables have in the same time the best and worst values).

The application of probabilistic and statistical methods is a display of the interdependence between subsequent net cash flows. If the cash flows that will take place in subsequent years are independent (i. e., NCF received in year t does not affect on the values of the net cash flow in the next year ($t + 1$)), then the risks of an investment project is represented by variance and standard deviation. If, instead, the net cash flow in year t depends on the cash flow in the previous period ($t - 1$), in this case, calculation of the covariance of net cash flows is required.

In probabilistic understanding dispersed risk assessment is to evaluate several possible levels of flows of fi-

nancial resources for each period, as well as in determining the probability of their realization with the aim of establishing the expected balance of these flows (NCF). If we assume that the cash flows of this investment project are independent, then the sum of probability of their display determines the probability of a certain balance of these flows — net cash flows. The combination of possible cash flows forms the following scenarios for which the metrics NVP are calculated. This determines the expected net present value, dispersion of random variables, standard deviation, and coefficient of variation. Therefore, it is proposed the following algorithm to calculate the expected value of NVP of the investment project in the economic space of a region (tab. 1).

In the process of determining of semi-dispersion risk alternately should be calculated the following: half-dispersion of net present value, half-variation and the coefficient of half-deviations (table. 1).

Standard semi-deviations is an absolute measure of risk, which can be used as a criterion during the absolute evaluation. As a relative criterion, it may be applied, when the comparable projects are characterized by similar expected values. Otherwise, coefficient of half-deviations can be used as a relative measure of risk.

Semi variance and standard semi-deviations, as in the case with dispersed risk, should be calculated on the basis of less aggregated initial data that is at least pragmatic. In making investment decisions in practice disperse risk is taking into consideration. This follows from the fact that the distribution of the probability of occurrence of positive and negative deviations is mostly symmetrical. That is why semi variance may be equal to half of the variance, and therefore the application of these two methods can give similar results. If the distribution is not symmetric, then semi variance is less than dispersion, and with the growth of this difference the risk perceived in a negative vision is also decreased.

Table 1. – Algorithm of the expected value of NVP of the investment project in the economic space of a region calculation

No.	Indicator	The formula for calculating	Interpretation
1	2	3	4
1	Net present value $E(NPV)$	$E(NPV) = \sum_{i=1}^n p_i \cdot NPV_i$	$E(NPV)$ — the expected value, NPV , p_i — the probability of the i -scenario, NPV_i — value of NPV i -scenario

1	2	3	4
2	Dispersion	$V(NPV) = \sum_{i=1}^n p_i \cdot [NPV_i - E(NPV)]^2$	$V(NPV)$ — dispersion NPV, $E(NPV)$ — the expected value NPV, p_i — the probability of the i-scenario, NPV_i — value NPV i-scenario
3	Standard deviation of dispersion	$\sigma(NPV) = \sqrt{V(NPV)}$	$\sigma(NPV)$ — standart deviation of net present value, $V(NPV)$ — dispersion NPV
4	Coefficient of variation of net present value $C(NPV)$	$C(NPV) = \frac{\sigma(NPV)}{E(NPV)}$	$C(NPV)$ — coefficient of variation, $\sigma(NPV)$ — standart deviation of net present value, $E(NPV)$ — the expected value NPV
5	The semi dispersion of the net present value	$V(NPV)_{sem} = \sum_{i=1}^n p_i \cdot h_i^2$	$V(NPV)_{sem}$ — semi dispersion NPV, p_i — the probability of the i-scenario, h_i — factor that dependents on the sign of the deviation
6	$h_i = \begin{cases} 0 & \leftrightarrow NPV_i \geq E(NPV) \\ NPV_i - E(NPV) & \leftrightarrow NPV_i < E(NPV) \end{cases}$		
7	Semi deviation of standard value NPV	$\sigma(NPV)_{sem} = \sqrt{V(NPV)_{sem}}$	$\sigma(NPV)_{sem}$ — standart semi deviation of net present value, $V(NPV)_{sem}$ — semi dispersion NPV
8	Coefficient of half-variation	$C(NPV) = \frac{\sigma(NPV)_{sem}}{E(NPV)_{sem}}$	$C(NPV)_{sem}$ — semi coefficient of variation, $\sigma(NPV)_{sem}$ — standart semi deviation of net present value, $E(NPV)_{sem}$ — expected half –value NPV

According to O. V. Pylypyak, standard deviation (standard deviation), average absolute deviation, variance and semi variance are the common absolute measures assess of the risk level of real investment. These indicators are based on deviations of individual values of random index from the average value. Application of the indicators average standard deviations, variance and semi variance allows to quantify the risk of several projects, or several variants of one project. More over the lowest risk will be that project, which would have the minimal the value of these indicators, because for this project the dispersion of a random variable around its average value will be the smallest [1, P. 240–241].

Dispersion and semi dispersion are the main probabilistic and statistical methods of risk assessment that are applied in these cases when the financial flows of the following years are independent. If the cash flows (NCF) in year t are dependent on cash flow for the previous period ($t - 1$), then the method of covariance is used for the risk assess. This method is associated with a conditional

probability of net cash flows. That is, if in year $t = 1$ and i -net cash flows (NCF), as well as the corresponding indicators of the probability p_{1i} , in year $t = 2$ are j -net cash flow (NCF_{2j}) and the corresponding indicators of the probability p_{2j} , simultaneously this probability is conditional and is based on the formula:

$$p_{2j}(NCF_{2j} / NCF_{1i}) = \frac{p(NCF_{1i} \wedge NCF_{2j})}{p_{1i}(NCF_{1i})} \quad (1)$$

where $p_{2j}(NCF_{2j} | NCF_{1i})$ — the probability net cash flows NCF_{2j} under condition that there was a previous display of net cash flows, NCF_{1i} , $p_{2j}(NCF_{1i} \wedge NCF_{2j})$ — the probability of obtaining of net cash flows NCF_{1i} in year $t = 1$ and NCF_{2j} in year $t = 2$, or their simultaneous display.

After conversion we get an example of determining the probability of display in year $t = 1$ and in year $t = 2$ of net cash flows NCF_{1i} i NCF_{2j} :

$$p(NCF_{1i} \wedge NCF_{2j}) = p_{1i}(NCF_{1i}) \cdot p_{2j}(NCF_{2j} / NCF_{1i}) \quad (2)$$

After determining the conditional probabilities for data net cash flows, using examples from independent

flows of NCF, NPV values are calculated for all possible combination of flows, NCF, and further — statistical measures of risk: the expected net present value, standard deviation, and coefficient of variation. The covariance, i. e., which determines the relationship between the following net cash flows can be calculated on the basis of the following example:

$$\begin{aligned} \text{cov}(NCF_1, NCF_2) &= \\ &= \sum_{j=1}^n p_j \cdot [NCF_{1j} - E(NPV_1)] \cdot [NCF_{2j} - E(NPV_2)]. \end{aligned} \quad (3)$$

where: $\text{cov}(NCF_1, NCF_2)$ — covariance between the net cash flows in the first and second year of the investment project.

Covariance is a category, which characterizes the total change for two random variables, in particular if it is equal to zero: ($\text{cov} = 0$), then the net cash flows are independent; more than zero ($\text{cov} > 0$), then the flows NCF are positively interdependent; less than zero ($\text{cov} < 0$), then the net cash flows are negatively interdependent.

However, in the scientific literature the relative indicators of variation, characterizing the degree of risk per unit of return (profitability), and therefore can serve for comparison of different projects from the point of view of risk, are more common than the absolute indicators in the practice of risk assessment of real investment, are. The scientists emphasize the quadratic coefficient of variations and the quadratic level variation [1, P. 242–243; 4].

By means of coefficient of variation it is possible to compare the fluctuations of the features expressed in different units of measurement. The coefficient of variation can vary from 0 to 1. The greater the variation coefficient is, the stronger the vibrations will be. The more vibrations are, the higher the risk will be. When you select the best solutions it is advisable to use the rule of optimum fluctuation result, the essence of which is the following: you may choose a decision from all possible

decisions, in which the probability of winning and losing for the same risk investments have a small gap, i. e., the smallest value of the average quadratic deviation and variation [5, P. 138; 10, P. 70; 11, P. 24–25].

As already noted, the investment is profitable when the expected cost $E(NPV)$ will be positive. The standard deviation shows the level of deviation between average future value and net present value (plus, minus) from a certain expected value NVP. The coefficient of mutability defines the amount of risk per 1 unit $E(NPV)$. In this case, the criterion for risk assessment is the maximization of expected value and minimization of standard deviation and variance. The main drawback of this method (risk of dispersion) is a uniform interpretation of all possible deviations, both positive and negative, as identical risk objects. Then, as the positive deviation is a useful for the investor, contrary to the unwanted negative. The semi variance is a level of risk and it is understood as a negative deviation from the expected net present value.

Conclusions

Thus, the main advantage of probabilistic and statistical methods is that fact, that the measurement of risk is carried out using objective measures — standard deviation and coefficient of mutability. However, these methods have certain disadvantages, in particular the necessity of making a large number of assumptions and the difficulty of estimating the probability both as net cash flows, and individual scenarios.

Using the proposed approach to risk factor assessment in the evaluation of the effectiveness and feasibility of investment projects in a region, an investor can exercise an informed choice of the best of them. This will increase the degree of validity of the investment decision-making, reduce the probability of deterioration in the financial condition of the potential investor, and will improve the relationship between risk and expected return of investment projects in the economic space of a region.

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COMPARATIVE ANALYSIS OF THE GERMANY AND UZBEKISTAN CORPORATE GOVERNANCE CODES

Abstract

Objective: to make comparative analysis of the corporate governance codes of Germany and Uzbekistan.

Methods: There is used the method of comparative analysis in the article.

Results: Researchers can learn the advantages and disadvantages of the two codes and can use the findings of the article in their studies.

Scientific novelty: The Code of Corporate Governance is a new law in Uzbekistan and developed on the basis of successful experience of Germany and other highly developed countries. We analyzed Germany and Uzbekistan Corporate Governance Codes and gave recommendations for the elimination of disadvantages in the article.

Practical significance: Joint stock companies can use the conclusions of the article, in particular recommendations for the development of rules in their activities.

Keywords: Management, corporate governance, joint stock company, code, general meeting, shareholders.

Introduction

The diversity of property relations that is among the validity conditions of the market economy, in turn, requires improvement of joint stock companies (JSC) along with other forms of ownership. The development of corporate governance is also connected with the process of privatization of state property. As a result of this work, many joint-stock companies have been established in Uzbekistan. The activities of large enterprises in the form of JSC, which make a significant contribution to the growth of the country's gross domestic product, also attest to the great importance of the development of corporate governance. Uzbekistan such as the many countries of the world connects the way of its development with the socio-economic system of the market economy. To improve the activities of the JSC, there are many features of Uzbekistan, such as attracting foreign direct investments, further improving the efficiency of joint-stock companies, ensuring their transparency and attractiveness for future investors, introducing modern corporate governance practices, creating favorable conditions for strengthening the role of Shareholders in the strategic management of enterprise.

Results of the research

On the basis of the decree PF-4720 "On the measures of introduction of modern methods of corporate governance in joint stock companies" [1] of the first president of Uzbekistan I. Karimov on April 24, 2015 developing of Uzbekistan Corporate Governance Code [2] (UCGC), which was approved at the meeting on December 31, 2015 by the Commission for enhancing the efficiency and improvement of the Corporate Governance System of joint-stock companies at the meeting on December 31, 2015, was the first step towards the implementation of the above mentioned tasks.

For additional information, Commission for enhancing the efficiency and improvement of the Corporate Governance System of JSC is established to assess the effectiveness of the joint-stock companies of Uzbekistan on the basis of the Resolution of the President of the Republic of Uzbekistan of March 31, 2015 № PF-2327. One of the main tasks of the Commission is to conduct a systematic study of the financial and economic activities of domestic JSC, as well as to determine the prospects for their further development.

In this regard, a thorough study of the activities of joint-stock companies created by the Governmental Commission was carried out to determine their compliance with the size of the authorized capital, the presence

of signs of economic insolvency and other indicators and requirements established by the legislation. As a result of the study, 364 JSC were identified that do not comply with the requirements established by law.

Table 1. – Comparative analysis of the Germany and Uzbekistan corporate governance codes

№	Chapters of UCGC	Chapters of GCGC
1	General rules	Foreword
2	Provision of transparency of activities	Shareholders and the General Meeting
3	Introduction of mechanisms of effective internal control	Cooperation between Management Board and Supervisory Board
4	Ensuring implementation of the rights and legal interests of shareholders	Composition and Compensation
5	Determining the development strategy and tasks for a long-term perspective	Supervisory Board
6	Implementation of mechanisms of effective interaction of the executive body with shareholders and investors	Transparency
7	Conflict of interest	Audit of Annual Financial Statements
8	Introduction of a typical organizational structure	
9	Publication of information based on international audit standards and financial statements	
10	Monitoring implementation of code recommendations	
11	Final provisions	

Below we will make a comparative analysis of the Code with Germany Corporate Governance Code [7] (GCGC), and evaluate its significance for enhancing the efficiency and improvement of the Corporate Governance System of joint-stock companies according to the management principles.

It should be noted that, GCGC was developed by Germany Corporate Governance Commission in February, 2002 and published in the Official Gazette. In contrast to UCGC, GCGC is compulsory for JSC which possess exchange quotations. It applies to companies that are either public or have other securities — for example, bonds — traded in regulated markets, including multilateral trading platforms (MTFs). This rule of law requires companies to provide a declaration of compliance with the requirements (Entsprechenserklärung), which must be published in the online version of the Official Gazette. Companies that fully comply with the provisions of the code can simply state that they comply with the established requirements in full; Other companies should give explanations as to which provisions they are not observing, sometimes limited to the word-

ing that they will not apply certain provisions, or that the individual provision is not adapted to the specifics of the company. The statements relate to past facts and the company's intentions for the near future, with the latter part not mandatory [3].

As Chris Pierce said: All of the European jurisdictions have companies acts that regulate the activities of companies. These laws typically draw clear “lines” to distinguish legal from illegal activity.

Soft law is typically composed of corporate governance codes that contain “recommendations” for good and responsible governance. Typically, companies are required to report to their shareholders on a comply-or-explain basis.

If a company chooses to depart from a corporate governance code, the company must explain in its annual report to shareholders which parts of the code it has departed from and why it has done so. A comply-or-explain approach provides companies with flexibility to adapt their corporate governance to their specific situation. Technically, “apply or explain” (associated with the King Reports in Southern Africa) is a more accurate term than

“comply or explain,” but it is rarely used in Europe other than in the Netherlands (which is the country that first brought in this expression) [5].

At first glance we can see the difference between the numbers of codes' chapters. UCGC consists of 11 chapters and 42 articles, and there are 7 chapter and 32 articles in GCGC.

If we look at the names of the codes, the question arises: Are there any differences in the essences of the codes like their number of chapters?

“General rules” — the first chapter of UCGC and “Foreword” — the first chapter of GCGC, and “Provision of transparency of activities” — the second chapter of UCGC and “Transparency” — the sixth chapter of GCGC are essentially focused on the same issues.

Today it is not a discovery for anyone that the application in practice of transparent and fair rules and well-established mechanisms of observance of the legal norms of corporate governance ensure the attractiveness of the domestic economy for both domestic and foreign investors and extending far beyond the interests of shareholders or corporations is a critical factor of economic growth.

Second chapter of GCGC (Shareholders and the General Meeting) is devoted to Shareholder powers and their relation with the General Meeting.

Board-centric systems (like those of Germany, Italy, the Netherlands and Poland), reserve only certain key powers to the general meeting. These powers are defined in the law either by a catch-all clause (such as “economically important decisions”) or by a catalogue of fundamental decisions, such as charter amendments, share issuance, mergers, divisions etc. In shareholder centric systems, like the U.K., the division of powers between the board and the shareholders is left to the articles of association, but the shareholders may decide in all matters that lie in the competence of the board and may change its decisions by reaching a 75 per cent majority of the votes [4].

It is mentioned that an auditor is appointed by the General Meeting of the Shareholders in the second chapter of GCGC.

GCGC: “2.2.1. The Management Board submits to the General Meeting the Annual Financial Statements and the Consolidated Financial Statements. The General

Meeting resolves on the appropriation of net income and the discharge of the acts of the Management Board and of the Supervisory Board. It elects the shareholders' representatives to the Supervisory Board and, as a rule, the auditors” [7].

According to chapter 3 article 16 of UCGC, General Meeting of the Shareholders approves the “Regulations on Internal Control”, and defines the requirements for the structure and members of Internal Control Body (Revision Commission and the Internal Audit Service) of the JSC, and develops order of attracting independent professional organizations — consultants to assess the effectiveness of the system of the internal control body of the JSC. If we consider that it is emphasized the issue of self-control in UCGC, the General Meeting of the Shareholders should seriously consider above mentioned recommendation and appointing of the auditor in a separate paragraph of the Regulations will be consistent with the objectives.

“Ensuring implementation of the rights and legal interests of shareholders” — Chapter 4 of UCGC and “Shareholders and the General Meeting” Chapter 2 of GCGC are similar in content. Issues on the rights of the shareholders which can't participate in the General Meeting of Shareholders, the realization of the necessary measures which directed to ensure the implementation of the rights and legitimate interests of shareholders, shareholders' rights of preferential purchasing of shares proportionally to the share in the authorized capital in the event of the issue of additional shares are reflected in both of the codes.

In addition, the UCGC has several chapters containing issues which are not envisaged in GCGC. In particular, while there is not any article provided for minority shareholders committee in GCGC, in UCGC there is mentioned that minority shareholders committee activities to be organized on a voluntary basis taking into account the scale, nature and direction of the network of JSC, and expenses of minority shareholders committee are covered by the JSC funds.

We can bring as evidence for above mentioned idea that the Ministry of Justice on August 27, 2015 for № 2712 registered the order of the Center on 10.08.2015 № 2015–09 on approval of the Regulations on the pro-

cedure for the activities of the committee of minority shareholders in the JSC.

This Regulation was developed in accordance with Article 82 of the Law of the Republic of Uzbekistan “On Joint Stock Companies and Protection of Shareholder Rights” (dated 05.05.2014 №. O’RQ-370), according to which, in order to protect the rights and legitimate interests of minority shareholders in a JSC, a committee of minority shareholders may be established from among them. In the election of members of the committee, shareholders present at the general meeting of shareholders who did not nominate candidates to the supervisory board or whose nominees were not elected to the supervisory board at the general meeting of shareholders held.

The committee can not include a director, members of the management board of the company, as well as persons elected to the supervisory board and the audit commission (auditor) of the company.

According to clause 1 of the Regulations, minority shareholders are understood to be the owners of shares whose participation and voting at the general meeting of shareholders does not affect the results of voting on the agenda of the meeting.

In clause 7 of the Regulation it is established that the decision to elect members to the committee is adopted by the general meeting of shareholders for a period of one year.

In accordance with clause 12 of the Regulations, in order to organize the activities of the committee, the head of the executive body of the company is obliged to create the necessary working conditions for the members of the committee by allocating a working space, computer equipment, safe, telephone or facsimile connection.

It’s said in Chapter 5 (Determining the development strategy and tasks for a long-term perspective) of UCGC that elaborating and approving of a long-term development strategy of JSC for a period of more than 5 years are carried out by the General Meeting of the Shareholders, and Chapter 3 (Cooperation between Management Board and Supervisory Board) of GCGC says that strategic aspects of JSC are carried out on the basis of mutual consent of Management and Supervisory Board.

GCGC: “3.2. The Management Board coordinates the enterprise’s strategic approach with the Supervisory

Board and discusses the current state of strategy implementation with the Supervisory Board in regular intervals” [7].

From our point of view, assigning of the task of elaborating a long-term development strategy to the General Meeting of the Shareholders is very important in strengthening the role of shareholders in the strategic management of enterprises.

It’s mentioned in GCGC that the General Meeting of the Shareholders is to be invited for a period not less than once a year, and according to UCGC, governing body of JSC usually refers the date of the general meeting in JSC’s charter.

Besides, issues such as reimbursement of the damage caused to the enterprise as a result of violation of the principles of management by a member of the management or supervisory board, establishment of a franchise in professional liability insurance contracts, credit allocation to the management or supervisory board or members of their families are not mentioned in any paragraph of UCGC. The main reason of these shortcomings is there is stipulated in UCGC, that JSC develops 5 regulations in order to establish its activities effectively. These regulations are followings:

1. Regulations on Information Policy
2. Regulations on the Supervisory Board
3. Regulations on Internal Control
4. Regulations on Dividend Policy
5. Regulations on the procedure of acting during the contradiction of interests

In our view, it would be useful if there were given instructions referred on above mentioned cases in these regulations.

There are given recommendations on avoiding the situations related with conflict of interest and conflict resolution measures in chapter 7 of UCGC. Although this issue is not included as a separate chapter in GCGC, but chapter 4, article 3 and chapter 5, article 5 of the code are dedicated to conflict of interest.

Conclusions

Rules and norms of corporate governance are important components of the framework for successful market economies. Although corporate governance can be defined in a variety of ways, generally it involves the

mechanisms by which a business enterprise, organized in a limited liability corporate form, is directed and controlled. It usually concerns mechanisms by which corporate managers are held accountable for corporate conduct and performance.

Corporate governance is distinct from and should not be confused with the topics of business management and corporate responsibility, although they are related [8].

The effectiveness of the corporate governance system depends on the trust of the public, and it can not be obtained without the timely provision of complete and reliable information. The appropriate mode of disclosure is the main prerequisite for the shareholders to exercise their rights, protect their legitimate interests and is one of the main ways of corporate control. For investors and creditors, the forms in which shareholders exercise their ability to control the activities of the management of a JSC and participate in the adoption of critical decisions must be understandable and acceptable.

To improve the domestic corporate governance system, it is necessary to create a flexible mechanism for investing domestic investors in the country's economy, widely introduce generally accepted international corporate governance standards into the practice of domestic JSC, create reliable legal mechanisms to protect investors' rights, ensure a high level of information transparency of the corporate sector, to develop and implement a system for collecting, analyzing and monitoring information

JSC, which will allow for the rapid accounting, processing and transmission of information through electronic channels, analyze and take, if necessary, operational measures to curb violations of the law.

The developed Code of Corporate Governance of Uzbekistan summarizes the best world practice, adapted for use in JSC of the Republic, and its successful implementation will promote the introduction and further improvement of the basic principles of corporate governance in the companies and firms of Uzbekistan, ensuring transparency of JSC activities, protecting the rights and legitimate interests of shareholders. In addition, it is noted that it is necessary to identify financial sustainability, increase labor productivity, increase production and export performance, achieve energy efficiency, modernize, technically and technologically upgrade production as strategic objectives of enterprises. Well-educated young people who own modern methods of corporate governance come to the leading positions of JSC. This, in turn, will give a new impetus to the activities of many enterprises, ensuring sustainable growth of the Uzbek economy, despite the deepening crisis in most countries of the world [6].

In conclusion, Uzbekistan Corporate Governance Code developed on the basis of successful experience of Germany and other highly developed countries, is compatible with the principles of science of management and can be recognized as high code of comparative value within the framework of international norms.

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