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Currency Wars: Myth and Reality

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Abstract. This article considers the term "currency war", its meaning and the present situation in the world economy. It also contains research and analysis of HSBC's operations in different countries in the devaluation race grouping them according to the participation in currency wars. Along with the benefits of the devaluation of its own currency the actual disadvantages that may reveal afterwards have been identified. This article highlights the different versions of events put forward by the experts in the global economy and analysts. The authors mention the possible problems of ordinary citizens in case of their country's aggressive policy to reduce their national currency. The behavior of the Russian ruble was also discussed in detail according to which the recommendations were given to depositors of banks about their future action in the circumstances. Devaluation race in any case cannot be completed safely but it is possible to avoid excessive losses if the countries achieve international agreement by establishing a new currency regime.

Keywords: currency wars; devaluation race; participants of currency wars; evaluation of exchange rates; analysis of currency and oil price dynamics; analysts' opinion; economic predictions; currency regime.

Introduction. Improving and strengthening of economic growth is a top priority for any country. Therefore, after the global financial crisis of 2008-2009 you can often hear the phrase "currency wars", the purpose of which is to give a boost to the national economy and increase employment in the country.

The term was coined by the Brazilian finance minister who said that the loose monetary polices in the U.S. and the Europe were hurting the emerging economies as the investors poured money into higher yielding assets and currencies of the emerging countries. Now the term "currency wars" is defined as simultaneous and deliberate actions of a few states directed at the devaluation of their currency against other monetary units [1].

In that way governments expect to provide domestic producers with a competitive advantage on the markets, to revive domestic production and to maintain an export surplus for their own benefit compared with the international partners. In this case, those countries obtain the greatest profit that were the first to join the "devaluation race" and as a result were able to support domestic producers for a longer period of time.

At previous international monetary regimes currency rates of the most monetary units to gold or the major currencies could be changed by directive. Today, in the era of mass free currency floating, it is not easy to achieve this goal and it often requires special unorthodox measures. The examples of such measures are those taken in Switzerland. Preventing the franc from the excessive strengthening it announced the upper limit of its exchange rate against the euro. To protect this achievement it was promised to buy foreign currency at the expense of unlimited

emission and even negative interest rates were introduced for deposits in francs (in other words, an investor has to get less in the end than the amount originally invested) [1].

The current arsenal of "currency wars" includes four types of weapons:

1) Rhetoric. For example, the speech of the European Central Bank President, Mario Draghi on February 7 entailed a sharp drop in the rate of the euro.

2) Reduction of rates. Often the currency gets strengthened due to the influx of capital, low bank rates make it less attractive and the price falls. Turkey uses such a policy actively when the lira depreciates against the dollar.

3) Direct intervention. Asian countries, China in particular, sell their own currency in the market and buy foreign ones effectively which leads to a gradual decrease of the yuan.

4) Quantitative Easing (Quantitative easing, QE) in a variety of forms. This is an indirect instrument for fighting in "currency wars" but its implementation is often has a side effect of a currency depreciation which can be seen in the US dollar. However, it is not always efficient – dollar has strengthened after the announcement of the unlimited emission QE3. [2]

At the same time, the policy of "quantitative easing" has led to the release of trillions of unsecured dollars, euros and yens by the central banks which in the absence of any other adequate application poured abroad in large numbers including the financial markets of developing countries thus threatening catastrophic strengthening of their currency. Unwillingly, they have to react and neutralize the flow of funds or monetary units by introducing capital constraints.

In addition to these methods of currency depreciation there are others – for example, a tax on financial transactions in Brazil, raising reserve requirements in the case of a foreigner buying local assets, encouraging domestic investors to spend money abroad, etc.

Recent economic developments. On the basis of how frequently a country uses weapons for fighting in "currency wars" the HSBC bank made a rating of the aggressors. Each country is assigned a score between 0 and 10 according to their "military" activity.

The most active aggressors are Japan, Switzerland and Argentina. Russia having received 3 points was declared a passive country due to the policy of the Central Bank of the Russian Federation that is aimed at making the ruble a flexible currency by 2015.

To wage "currency wars" aggressively each country has different motivations: fighting speculators, dealing with destabilizing volatility of the national currency and responding to the aggression of the other countries, etc. Indeed, the currencies of some countries are greatly overvalued or, on the contrary, undervalued. According to that, the actions taken for currency devaluation could be fair for certain participants of the "currency wars".

To determine the compliance with the measure of participation in the "devaluation race" in the present financial situation on the national currency market the HSBC bank has evaluated currency according to three major indices and calculated the average rating for each:

1) The current real effective exchange rate as compared to its average value over five years;

2) Evaluation of the purchasing power parity by Organization for Economic Cooperation and Development (OECD);

3) The Big Mac index. The graph of the "currency wars" participants was created. It defines where the country is on the coordinate plane in accordance with its currency exchange rate and its activity [2].

Thus, countries were divided into four groups:

1. Not wishing to participate in currency wars (low exchange rate and low propensity for aggression): South Africa, Hungary, Poland and other European countries, the Middle East and Africa (EMEA). These countries have cheap currencies but they are not involved in interventions – it just does not make sense for them to be engaged in wars.

2. Victims of Wars (high rate and low propensity for aggression): primary producing countries. Of course, they notice that their currency is overvalued. But so far no real action is taken – only a small rate cut and a few political statements. The weakness of other currencies will influence them more severely.

3. Just wars (overvalued currency and active aggression): Switzerland, the countries of Latin America.

4. Aggressors (undervalued currency and active aggression): Japan, Taiwan, Turkey, and the USA.

Global worries over competitive devaluation have been on the rise since Japan's freshly installed prime minister, Shinzo Abe, who's determined to stimulate a moribund economy, and has ordered Japan's central bank to be more expansionary. The Bank of Japan has agreed to a two percent inflation target and to make open-ended asset purchases from 2014. The yen has weakened about 14 percent against the dollar in the past three months.

There have been signs of rising capital inflows in China as well. The country's central bank reported on March 5 that companies and individuals sold a record 684 billion yuan ($109 billion) worth of foreign exchange and bought an equivalent amount of Chinese currency in January.

China also holds more than $3 trillion in foreign exchange reserves, the world's largest, making the country particularly vulnerable to depreciation-related losses.

Yi Gang, deputy governor of China's central bank, said last week the country was hopeful a currency war could be avoided, adding, at the same time, it "is fully prepared" for a currency war, Xinhua News Agency reported [3].

However, according to some experts the benefits of participating in the devaluation race are illusory and can later be transformed into:

1) Loss of competitiveness;
2) Social unrest;
3) War.

Loss of competitiveness. When a country subsidizes one's exports with an artificially weak currency, businesses lack an incentive to innovate. Advanced economies cannot compete on price, but must compete on value. European companies have long learned this, as there are rather few low-end consumer goods being exported from Germany. The Chinese have also heeded this lesson, allowing low-end industries to fail and relocate to Vietnam or other lower cost countries: China is rapidly moving up the value chain in goods and services produced. In summary, market pressure to innovate is the most powerful motivation. Governments subsidizing ailing industries through currency debasement do long-term harm to their economies.

Social unrest. Currency debasement is not just bad for the corporate world: it's particularly painful for citizens. Just ask citizens of Venezuela where the government just announced a 32 percent devaluation in the bolívar's official exchange rate to the dollar. An overnight move of that magnitude is immediately noticeable, as are the negative effects on consumers, whereas gradual debasement in currencies of advanced economies are less noticeable, but ultimately have the same effect. The natural consequence of currency debasement is inflation, i.e., loss of real purchasing power; the two forces meet at the gas pump: as a currency loses value, commodities – all else equal – become pricier when valued in that currency.

War. Currency wars destroy wealth. Currency wars have a disproportionate impact on the poor, as they don't hold assets whose value is inflated in nominal terms and that could buffer some of the fallout. Central banks don't cause real wars. But monetary policy has a profound impact on the social fabric. Abstract theories about how aggressive monetary action are the remedy to depressions ignores the heavy social toll currency wars have on people. For those that argue that the social toll of a depression is greater, we respond that the best short-term policy to address economic ills is a good long-term policy. We cannot see how currency wars can be good long-term policy [4].

As far as Russia and the Russian ruble are concerned, the deputy chairman of the Central Bank Alexei Ulyukayev said at the conference that was held on January 16-19 within the framework of Gaidar forum 2013 that Russia will not participate in "currency wars". The volume of interventions of the Central Bank is on the decrease, trading range is constantly growing, and interest rates will fall in case of a significant slowdown in inflation for a year. However, the oil market also has significant impact on USD/RUR change. The dynamics of oil prices shows their decrease with an alternate and a very slight increase (Figure 1), therefore, the rate of the ruble against the US dollar falls (Figure 2) [5, 6].
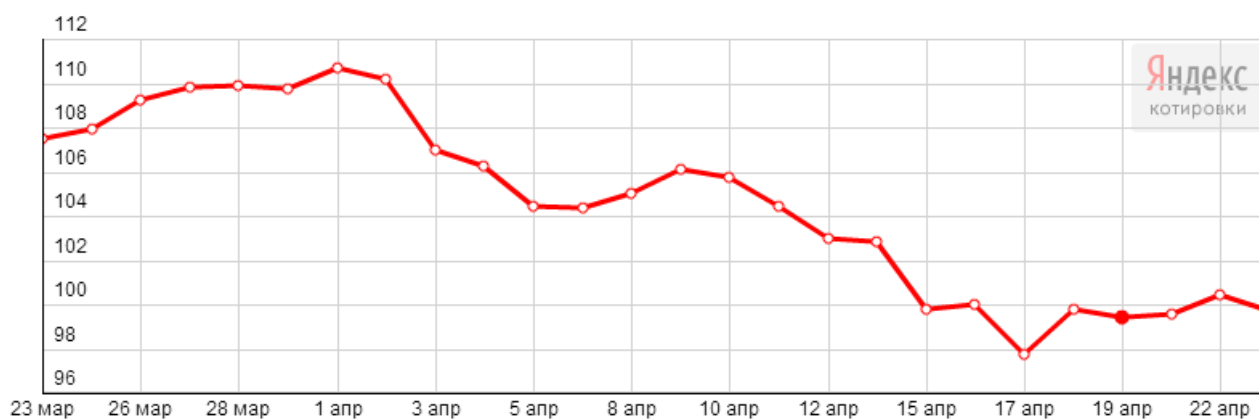
Figure1 – Dynamics of oil prices Brent, USD/barrel (March-April 2013)
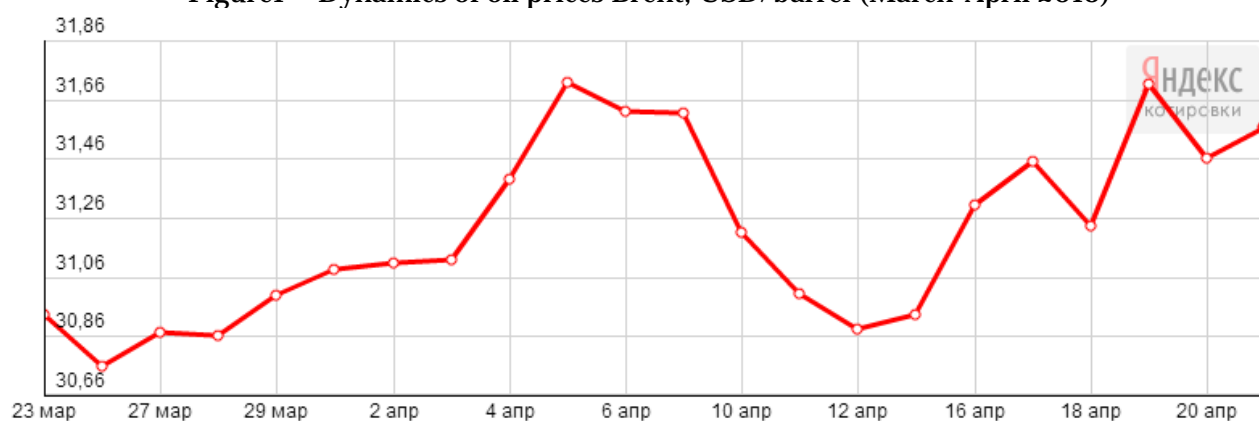
Figure 2 – Dynamical correlation of rates USD/RUR (March-April 2013)

On the other hand, the exchange rates are interdependent, so excessive fluctuations of world currencies may reduce the real value of Russian investments to the securities and cash assets of the other countries. Even more dangerous is the possible destabilization of international finance and, consequently, deepening and intensifying of the crisis in the world economy.

Analysts' predictions about the behavior of the Russian ruble in terms of "currency wars" are different. Most of them believe that Russian economy needs to weaken the ruble, the exchange rate of which may be established at the level of 33-34 rubles/$ in the second half of 2013 [7]. But there is also an opinion about the strengthening of the national currency in the nearest future, which may result in a loss of competitiveness and the country's economic growth, deteriorating the terms of foreign trade [8]. At the same time, Vladimir Putin said that the ruble volatility has an advantage because it curbs the financial speculations [9].

Depositors and ordinary citizens suffer the most in currency wars. When a country tries to devalue its own currency intentionally, extremely large sums of money in bank accounts lose their purchasing power. Gas prices soar. Groceries get more expensive. And the bills are climbing higher every month. "The real victims of this situation are innocent civilians," Aaron DeHoog, Financial Publisher of Newsmax Media, said. "Those who are investing 'safely' can lose as much as 50% of their savings if things get out of control."

Conclusion. Guided by the opinion of analysts and existing dynamics of oil prices and foreign exchange rates, a recommendation can be given to the Russian bank depositors to keep their savings in US dollars and keep an eye on the trends of world currencies taking into consideration the possibility of changes.

As for the global "currency wars", the economists of different countries foresee their end, probably not painless. As all free floating currencies cannot be devalued at the same time, and no one wants to lose this "war", all the participants may come off worst: excess money circulation will entail inflationary outbreak. It will also add volatility to economic development, distort the basic price proportions and inflate the price "bubbles" in the financial markets.

However, the recent data show that the economies of the leading countries are gathering strengths. There has been a gradual improvement of the situation in the euro-zone. If such a "recovery" of the economies continues, then the countries will have no reason to participate in a "devaluation race". In the near future, the countries may even reach an agreement on a new international currency regime, which could be a worthy end of "currency wars".

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Валютные войны: миф и реальность

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Аннотация. В статье рассматривается термин «валютные войны», его значение и настоящая ситуация в мировой экономике. Также приведены исследования банка HSBC и анализ действий различных стран в гонке девальваций с разделением их на группы по справедливости участия в валютных войнах. Вкупе с преимуществами девальвации собственной валюты были обозначены и ее фактические недостатки, которые могут проявиться в долгосрочном периоде. В данной статье освещены различные варианты развития событий, высказанные экспертами в области мировой экономики и аналитиками.

Затронуты возможные проблемы обычных граждан в случае проведения их страной агрессивной политики снижения курса национальной валюты. Кроме того, было подробно рассмотрено поведение российского рубля, в соответствии с которым были даны рекомендации вкладчикам банков по поводу их дальнейших действий в сложившихся обстоятельствах. Гонка девальваций в любом случае не может завершиться безболезненно, но можно и избежать чрезмерных потерь, если страны достигнут международного соглашения путем установления нового валютного режима.

Ключевые слова: валютные войны; гонка девальваций; участники валютных войн; оценка обменных курсов; анализ динамики валютных курсов и цен на нефть; мнения аналитиков; экономические прогнозы; валютный режим.

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The Region of the Tara Mountain – Entrepreneurial Initiatives

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Abstract. The Tara Mountain is situated on the west border of Serbia. Terrain observation has provided comparative analysis of attractive mountains in Serbia. It has explained the position of the Tara Mountain in different important categories (geographic, touristic etc). Literature sources have helped in the analysis of the past entrepreneurial initiatives. Some important facts are provided by the questionnaire, in the form of the interview. The article has presented entrepreneurial initiatives on the two levels. "Time level" has divided entrepreneurial initiatives on: the time before socialist period, socialist period, then initiatives in the period from 1991 to 1999 and initiatives from the period of transition and owner transformation. "Space level" has differed entrepreneurial initiatives from the two points of view. Depending on the relief, different entrepreneurial initiatives have found "perfect place under the sun" on the different exposure of the Tara Mountain and on the different altitude levels. Short survey of genders and professions of entrepreneurs is given. Synthesis of explorations results has showed some common characteristics of all entrepreneurial initiatives. Data obtained in the Republic Statistic Bureau have used for analyze of tourist circulation in the last ten years. It has contributed illustration of the last results of new entrepreneurial initiatives. The article search the answer on the following questions: How entrepreneurial initiatives contributed to the development of the Tara Mountain? Which entrepreneurial initiatives can improve the quality of life on the Tara Mountain? Using interview, the answer was gotten and formed by locals, tourists and experts.

Keywords: Tara Mountain; Serbia; entrepreneurial initiatives; regional development.

INTRODUCTION

Serbia has not uniform regional development [Radovanović, 1993/94, Miletić, 2006, Miljanović, Miletić, Đorđević, 2010]. Mountains are less developed in compare with plains and valleys [Schild, Sharma, 2011, Maselli, 2012]. Discussion about entrepreneurial initiatives on the mountains is untypical theme in Serbian geographic practice. Results of exploration have confirmed existence a new trends of entrepreneurial initiatives in Serbia, which has reclined on the tradition. Influences of entrepreneurial initiatives in regional development of West Serbia are elaborated in the paper. Particular attention is given to the region of Tara Mountain. Characteristics of entrepreneurial initiatives were analyzing. Analyze recline on the some criteria, e.g. time, space etc. The task of the paper was to discover different types the characteristics. Aim of the paper was to find the answer on the following question: can good entrepreneurial initiatives promote sustainable regional development in the mountain regions? Importance of the paper is in the enriching geography knowledge about West Serbia region.

STUDY AREA

Tara is a mountain in western Serbia (Figure). It has a peripherally position in relation to the main tourist routes of movement in Serbia. The Tara Mountain, in general appearance, the character of a plateau–type mountain which extends NW-SE direction with an area of 183 km square and an average height 1150 m above Sea level of. The highest peak is a Zborište (1544 m). The Tara Mountain boundaries were determined based on

geomorphologic criteria, i.e. based on the orography. By Zeremski [1956], in the north and northeast Tara is limited by a steep section and piedmont that descends into the valley of the Drina River and Bajina Bašta broader. To the east, across Kaluđerske Bare, gradually goes into slightly wavy plateau Ponikve and here its border largely going through the valley of the Solotuška River. In the SE part of the surface of the Tara Mountain is a gentle slope down to Kremanska valley, and to the west by the canyon of the Derventa river and Mokra Gora-Rzavskim syncline. The center part of the mountain is: a combination of dry and blind valleys, interior valleys (small karst polje) and sinkholes, while in the periphery of the Tara Mountain cut through the source branches and tributaries of the Drina River. The biggest tributary is the Rzav River.

According to Nikitović [2006], the Tara Mountain belongs to 21 villages, with a total population of 9296 inhabitants. The average age of the population, according to the census in 2002, was 48 years old. However, there are villages such as Zaovine and Kršanje, in which she crossed 60.

Figure Geographic toponymes of the Tara Mountain

MATERIALS AND METHODES

Determining borders of the Tara Mountain and different historic facts demanded the use of various literature and cartographic sources. Some facts have ensued as the result of analyses of data received at the Republic Bureau of Statistics. Results of the survey were graphically presented and their comment was given. Future trends of the Tara Mountain development depend of mountain population as well as tourists. The other method is the questionnaire in the form of the interview, according to Thom [2009, 193]. The aim of the interview was to find their thoughts about development. Mountains are sparsely populated areas [Euromontana, 2004; Wohl, 2006], and that is also the case with the Tara Mountain [Nikitović, 2006], so the number of sample of respondents had to be smaller than planned. Factor analysis should not be done with less than 100 observations [Bartlett et al, 2001]. But, in interview studies, sample size is often justified by interviewing participants until reaching "data saturation" [Francis et al, 2010]. The questions had open character, and the answers not predictable. In addition, the specific facts described in the paper (without literature sources) were observed and noted in communication with the local population.

TARA MOUNTAIN AND OTHER CONCURRENT WEST SERBIA MOUNTAINS

Serbia has several mountains regions. In the part of Cenozoic which name is oligo-miocen, West Serbia was aroused by limestone last time. Its mountains belong to the Dinaric mountain range. Because of theirs beauty, some mountains are very attractive for tourists. The most developed mountains are Kopaonik, Zlatibor and Tara Mountain.

Kopaonik is situated on the southeast part of Serbia. Like a Tara Mountain, nature of Kopaonik is protected. Both are National parks. Kopaonik is well known because of winter tourism is developed on his top and because of many spas in his foothill. The biggest problem of Kopaonik Mountain is earthquakes which are unpredictable and very strong. Second problem is that all constructions are built illegal. Illegal constructions have initiated other problems. For example, on the Kopaonik Mountain didn't find the solution for drainage communal waters. Tara Mountain has not already as endangered as Kopaonik Mountain. Hence, the whole community must work on the protection of that comparative advantage.

In compare with Zlatibor and Tara Mountain, Kopaonik has no good geographic position. Roads are good, but rare. Zlatibor Mountain lies on the west of West Serbia region. In compare with Kopaonik, it is well linked. The main road from Belgrade to the Montenegrin coast is passing though Zlatibor Mountain. Roads have brought many tourists in transit. However, heavy and dense traffic makes negative influence on the nature of Zlatibor Mountain. Tara Mountain has not many roads, but they are traced very well. Experience and statistics show that good roads are necessary for regional development [Kovačević et all, 2006, 36].

Conifers are symbol of Tara and Zlatibor Mountain. Great part of Zlatibor is highland on the 1400 m above see level. It is air spa and also very attractive space for tourists. During the last few decades many hotels were built on the Zlatibor highland. Besides them, many people build different types of hotels, motels, tourist houses, restaurants etc. From that period, Zlatibor has gotten urban atmosphere. Tara Mountain is completely different space in compare with other two tourist attractive and concurrent mountains. Common things for all three mountains are: beautiful nature and tourist affirmation in compare with all others mountains in the West Serbia region.

WHO ARE ENTREPRENEURS?

In the case of entrepreneurial initiatives on the territory of Tara Mountain, the first entrepreneurs were kings and dukes. With their financial support, monks and other people were continuing to develop their ideas. In the XX century, some entrepreneurial initiatives came from scientist and engineers. In recent times, leadership in initiatives is resumed by different types of artists. Local populations support all initiatives and try to involve themselves in it [Tomićević et all, 2005, 89]. Local people said that the first visitors to the Tara Mountain were wealthy people from Bajina Basta, Valjevo and Belgrade. After the First World War, businessmen, university professors, lawyers, engineers, composers, academics, biologists, sculptors, pharmacologists, surgeons, bankers, lawyers etc. have influenced the landscape mountain building houses. Some of them have

launched several initiatives. In September 1943, Bulgaria's punitive expedition set fire to the largest number of villas, summer houses and cottages livestock. Seventies of the 20th century, there has been enhanced building weekend houses, again. According to the results of the interviews, it was determined that in this way new people arrived, and with them new entrepreneurial ideas.

Officially, men are the initiators of entrepreneurial initiatives at the Tara Mountain. In the past, in patriarchal society, funds have belonged to men [Weber, 1978, Andersen, 2010].

TYPES OF INITIATIVES?

Types of initiatives can be analyzed from to points of view: time and space. From the point of view, which was named "time", it can be distinguished several periods. They are: old entrepreneurial initiatives or time before socialist period, after them entrepreneurial initiatives from socialist period, then initiatives in the period of Slobodan Milošević (from 1991 to 1999) and the recent entrepreneurial initiatives or initiatives in the period of transition and owner transformation. From the point of view "space", it can be distinguished differences of entrepreneurial initiatives according to the specific characteristics of the territory in which they are originated, developed and occurred. Different relief conditions correspond to different initiatives. In everyone it can be found some common things.

Point of view: T I M E

Old entrepreneurial initiatives: Rača Monastery represents the oldest entrepreneurial initiatives. In the Middle Age, monarchs gave confidence to monks, which had to save the spirit, faith, culture and knowledge of the people. Raca Monastery is unique in its milk-line. Every monastery feed itself. Because of that, all monasteries have always had small economy. In 1820, Duke Miloš Obrenović protected Forest of Tara Mountain the first time.

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The famous Serbian scientist, Joseph Pancic discovered spruce (Picea Omorika) [De Visiani, Pančić, 1862, Aleksić, Geburek, 2010]. Since 1875, he performed his famous field research with his students. From 1908, it was activated the first lift and the first forest railway for timber exploitation. From the early 1900's to 1925 Šargan Eight railway was able to work around the steep cutting and narrow gorges [Obradović, Simić, 2004]. Since 1925, there is a railroad "Užice - Vardište". Train Station in Kremani is only 8 km away from the Kaluđerske Bare. This distance is overcome using the oxcart and "wagon", which consisted of mountain horses. Ministry of Public Health 1928-1936 raises the sanatorium which was intended for the treatment of pulmonary patients. Tara Mountain is the most curative in the spring, in the time of flowering. Then the mountain aromas of various herbs (phytocides), that a beneficial effect on the human body. In 1934, a post office was built and electricity was brought to the plateau. In 1938, a mountain lodge is built [Misailović, 2006].

Entrepreneurial initiatives from socialist period: From the end of the II World War to 1991 it can be distinguished different aims of entrepreneurial initiatives. From 1947 to 1956 there was a great cutting of timber on the mountain Tara. The wood is then transported by rail. Utilization of natural potentials of Drina River and endeavor to upraise quality of life, in 1966, hydroelectric power plant was built. Economic reasons, which are recline on the idea of saving energy, from 1976 to 1983 have constructed reversible hydroelectric power plant. Superfluity of Drina water makes electricity for force pump, which sends other superfluity water in the Zaovine Lake on 600 m relative heights above sea level. In the time of deficiency of the water in the river bed of Drina, water from the Lake on the mountain falling down on the turbines in the foothill. Then they produce electricity.

On the 7th decade of XX century, beauty of Tara Mountain inspires some state advisors. Some of them have worked for electricity industry; others worked for Yugoslav national army etc. In that time, several hotels and cottages complexes were built on the two locations [Dobričić, 2007]. On the right shore of Perućac Lake have been air spa and excellent fishing area. Winter tourism has started to develop on the Kaluđerske Bare highland. On the location of Mitrovac was made resort for children.

Nature protection was the second entrepreneurial initiatives in the socialist period. In 1981, Tara Mountain became the largest National park in Serbia (19.175 hectares) [Tomić et all, 2000, 189] [Tomićević et al, 2005, 81] [Tomićević et al, 2010]. It is one of the most important moments in the history of Tara Mountain. From that historical moment, saved and protected areas attracted more then ever before tourists and nature admirers (Picture 2). Tourism is one of the most profit economies.

At the end of 1990s, the post-communist transformation has been progressing in Serbia. The transformation process has done so under difficult political and economic circumstances [Čoček 2010, Blagojević, 2012]. Period of Slobodan Milošević has occurred between 1991 and 1999. It is well known as a period without entrepreneurial initiatives. On the north foothill of Tara Mountain flows Drina River. In that period, west state border was established on that river. War occurred in neighbor, in Bosnia and Herzegovina. Many refugees had gone to Belgrade, Vojvodina or Central Serbia, toward the east and northeast. On the space of Tara Mountain, they were in transit. Economic situation in Serbia was instable and bad. Embargo generated economic crisis, which had generated social crisis [Kovacevic, 2008, 226]. Emigration toward big towns was promoted. Cultural heritage and material basis were without maintenance. In 1999, NATO aggression was the last tragedy in that black period for Serbia and entrepreneurial initiatives in it [Kovačević, Kicošev, 2007, 305].

Period of transition and owner transformation: Till the last decade of XX century, state has been the owner the important share in Serbia. When state is owner of something, then responsibility is collective. Period of intensive transition and owner transformation have started after 1999. Hotels and restaurants on Tara Mountain, the firsts have gotten new owners. Personal interests for profit arises a level of responsibility. New owners have started to work on modernization and on marketing. As a result, level of service quality start to rise.

New trends in tourism propagate return of man to nature. According to the fact that Tara Mountain belongs to National Park "Tara", it became compatible with contemporary trends in tourism. In the base of new entrepreneurial initiatives was nature protection. From 30th July 1990, Public enterprise "National park Tara" has managed of the National Park. This enterprise was established by decision of the Parliament of the Republic of Serbia [Mirković, 2002].

Water from many fast mountain rivers has started to be used for fishponds. People search high quality of nature. Fresh and clean air, good and quality water and peace they have found on the Tara Mountains. Many weekend houses have started to appear. Mountain Tara becomes a great inspiration for different artists. Monks in Rača Monastery start to produce health and organic food (honey, jam, brandy of walnut, vine of blackberry etc).

Šargan Eight has been completely restored 78 years after the original construction and 30 years of disuse [Obradović, Simić, 2004]. Between 1999 and 2003 the section over the Šargan pass was rebuilt by the Serbian Ministry of Tourism and the Yugoslavian states railway, now the Serbian railways. Šargan Eight has become museum, because it is attractive in every respect: configurations of terrain, technical sophistication of the design and beauty of numerous landscaped localities along the route (Picture 2). In 2004, UNESCO supported project of world well known movie director Kusturica. In the same year, judge of Architecture Foundation, Philip Rotie, proclaimed Drvengrad for the best architecture project between 2001-2004. Drvengrad is an ethno village in urban form and structure [ECODEV, 2012, 17]. On the initiative of Emir Kusturica, toll rate was established on the gates of National Park. This money have used for promotion of health protection of local population. Ski ground "Iver" is situated nine kilometer far from Drvengrad, under one of the highest peak of Tara Mountain (1490 m above sea level). It belongs to the Drvengrad and it has ski lift (length of 1400 m) which can transport about 1000 people per hour. [Jovetić, 2008].

There are many activities of public economy on the territory of Tara region. Sometimes, its development has been opposite as nature preservation and protection as well living world. For example, hunting is overdone. Forest has often cut out of any projection. Cattle use the land very intensive. Exploitation of medical herbs is overdone too. There is no any mechanism for control entrance of tourists in the areas of special reserves etc [Romelić, Ćurčić, 2000].

Point of view: S P A C E

This topic try to find the answer, where entrepreneurial have seen possibilities for start to realize their initiatives? Entrepreneurial initiatives have started to develop in these parts of Tara Mountains where enough flat space was. All expositions are present. The oldest entrepreneurial

initiatives had developed on the north, in the canyon of tributary of Drina River (Rača Monastery). Early in the century, the main Monastery pub was located in Kaluđerske Bare, on the Mountain plateau. After that, development was continuing on the south part of the Tara Mountain (Šargan Eight) [Obradović, Simić, 2004]. According to traffic development, middle of Tara Mountain was occupied. New entrepreneurial initiatives have started to revitalize the space on the same turn. For people it is perchance. Other links it with the old Latin thing "history is a teacher of life", because she has often repeated.

Analyze of altitude have found that entrepreneurial initiatives exist on the different height of Tara Mountain. In the north foothill, from 215 to 300 m above sea level, spreads Valley of Drina River and Perućac Lake. Strong limestone rocks, small fall of river bed and enough water in it all over the year represented to good place for dam and lake. Perućac Lake was a perfect nature potential for tourists and for hotel building. Rača Monastery is situated in the gorge of Rača River of the Tara Mountain (about 350 m above sea level). In the Middle Age monastery must be hidden from Turks. Slopes of the Tara Mountain belong to National Park "Tara" [Dobričić, 2007]. Often, they have been very scarp and they finished with palisades. Zaovine Lake lies on the 900 m above sea level. Complex of hotels on the highlands lies between 950 and 1100 m above sea level [Stojović, 2003]. For this objects highland were perfect place. Drvengrad was built on the hill, high 745 m above sea level. Isolation gives privacy to this cultural and leisure complex. Šargan 8th was prevailed altitude of 357 meters, from 453 to 810 m above sea level [Petrović, Pantić, 2004]. Entrepreneurs of Šargan tried to make quality of life much better. Every space can be used for entrepreneurial initiatives. Type of initiative have searched perfect place for realization.

COMMON CHARACTERISTICS OF ENTREPRENEURIAL INITIATIVES

Explorations show some common characteristics off all entrepreneurial initiatives. The first, all initiatives originate spontaneously. There is no any kind of plan for development. Every initiative have emanated from pleasure of entrepreneurs. All of them recline in the same base. Tourism has always been the strongest pull factor for entrepreneurial.

Common characteristics for old entrepreneurial initiatives went toward modernization (electrification, urbanization etc). In that time state support was very important, especially from the aspect of finance.

The same financial situation was in the socialist period. State money built power plants; roads, hotels etc, but no one have never worried about keeping and conservation. Very often material good and equipment have been decline and that have involved lost attention of tourists. During the socialist period natural resource has been used maximal. Restaurant was built above the Vrelo River. Limestone has started to use for production of white wash. Fish was exaggerate angled by local population and others visitors.

Also, it can be recognized some common characteristics of new entrepreneurial initiatives. Tradition has been returned in fashion. People prefer to eat health food which was prepared on the traditional way (local cheese and diary cream, corn bread, baked lamb roast and young goat roast, local roast – tenderloin and loin of pork etc). Traditional architecture with nature materials has given good condition for stay on mountain region. Old objects are in the process of rebuilds, like a houses and train line. New entrepreneurial initiatives come from artists, municipality government and students of tourism. In every case and in every time, local population has supported all entrepreneurial initiatives [Tomićević et all, 2005, 89].

THE LAST RESULTS OF NEW ENTREPRENEURIAL INITIATIVES

Statistics about the change in the number of tourists and the number of overnights stays are one of the indicators that can illustrate the impact of entrepreneurial ideas in the development of the Tara Mountain. They refer to the resultant consisting of both, new and old preserved ideas.

Data are presented concerning the last fifteen years, from 1996 to 2010.

Data from the period 1991 to 1995 are not relevant because of several reasons. During the disintegration of the former Yugoslavia, refugees and displaced persons have crossed over the Tara Mountain, with longer and shorter retention. In some accommodation facilities, refugees have been housed [Nikolic-Ristanovic, 2003].

During the existence of Yugoslavia, the tourist offer was varied and market was larger. The population of Yugoslavia has often wintered in developed ski resorts in Slovenia and Bosnia and Herzegovina [Gosar 1999, Verbole, 2000, Hamad et al, 2010]. Data are not comparable, among other things, for the following reason. If someone from Bosnia and Herzegovina today comes to Tara, he is considered by foreign tourist. Prior to 1991, he was the domestic tourist.

Statistics for the Tara Mountain refer to the following localities: Kaluđerske Bare, Sljivovica, Mitrovac, Perucac. According to them, at the Tara Mountain, after the NATO operation "Angel of Mercy", number of tourists did not fall below the 30000th. The number is changing, but it has a tendency of growth (Graph 1).
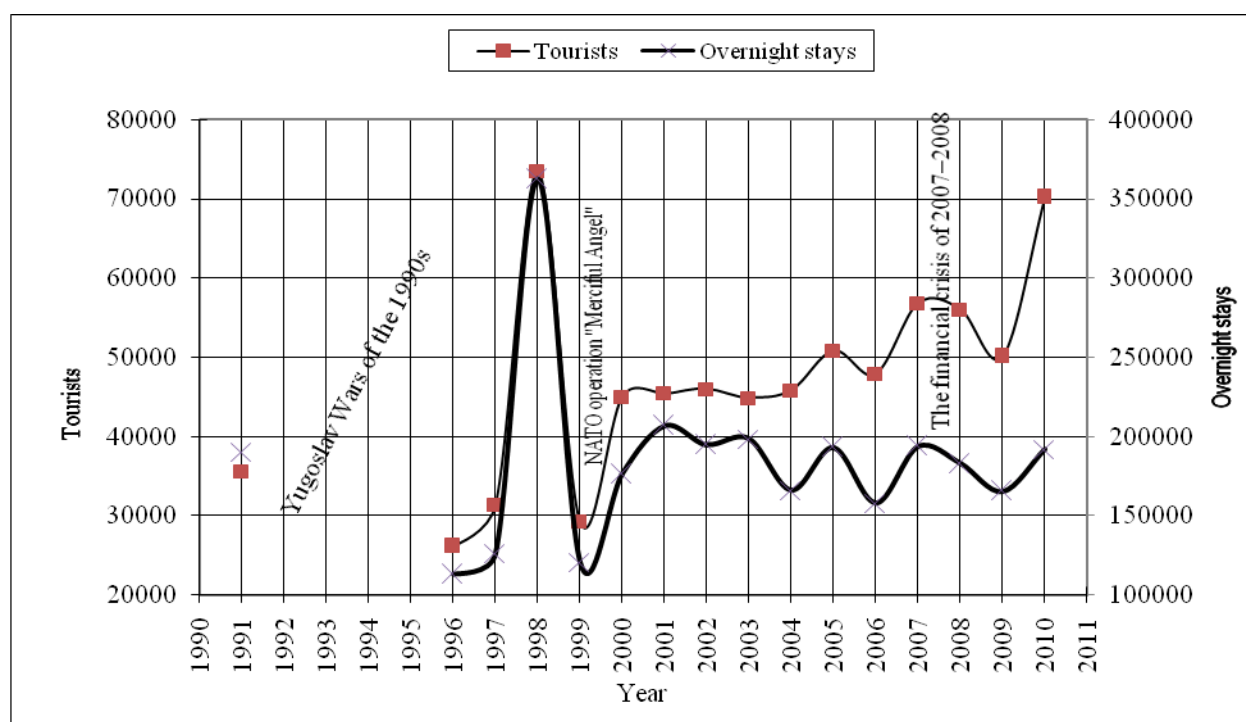
Graph 1 Changes of number of tourist and overnights stays on the Tara Mountain at the end of 20th century and on the beginning of 21st century

This statistic includes only registered visitors. Talking to locals, the following information was obtained. Particularly, there is certain number of people who spend time on the Tara Mountain, but they are not recorded anywhere. In Serbia, it is a common occurrence. Owners of weekend houses and accommodation facilities, because of higher profits, do not report all visitors. This means that in the Tara Mountain, especially in winter, there are more people than reported.

In addition, it should be noted that data for the localities: Iver, Drvengrad and Mokra Gora (from the south side of the Mountain) are not included in these statistics. Figure shows the fluctuation of the number of overnights stays. It does not exceed 200,000.

Domestic tourists on the Tara Mountain have more than foreign. In 1997, it was 73 times more domestic tourists than foreign. Ten years later, in 2007, in the above-mentioned four localities, which are monitored by official statistic, number of domestic tourists was 12 times more than foreign visitors.

According to statistical data, number of tourists, especially foreign tourists (Graph 2), continues to increase. For example, in 2008, the highest number of tourists was recorded. There were 3938 foreign tourists (7.0% of total number of tourists). In 2010, exactly 18400 overnights stays were realized (9.6% of total number of overnights stays) [Republički zavod za statistiku, 1992-2011]. Locals say, the incomes of tourism have started to grow.

Inclusion of the localities Drvengrad, Mokra Gora and ski resort "Iver" in the statistical monitoring would certainly increase the number of foreign tourists to the Tara Mountain. Locals say that foreign tourists have often visited these localities, but their accommodation facilities, for now, are still insufficient. Emir Kusturica, famous director and owner of Iver and Drvengrad,

habitually organize different manifestations. His friends from the film industry often come to these events. Wet Mountains is located next to Drvengrad. Its beauty and attractiveness completes the offer.

In communication with the locals, tourists and experts, it was found that the Tara Mountain is the most visited by children in the excursion. Frequent visitors include: geography students on field exercises and weekend tourists, who do not stay more than a day or two. Tara is a very attractive during the New Year's holidays. Participants in the various conferences have often stayed on the Tara Mountain. Tourists who come for wintering and children, who use the facilities intended for health improvement, have the longest stay. The average length of stay on the Tara Mountain is variable. It depends on the prevailing type of tourist movement in a given year. Data in Graph 3 show that domestic visitors have stayed all shorter at the Tara Mountain. Locals have explained it to economic reasons. Foreign tourists, in their opinion, have just revealed the beauty of the Tara Mountain.
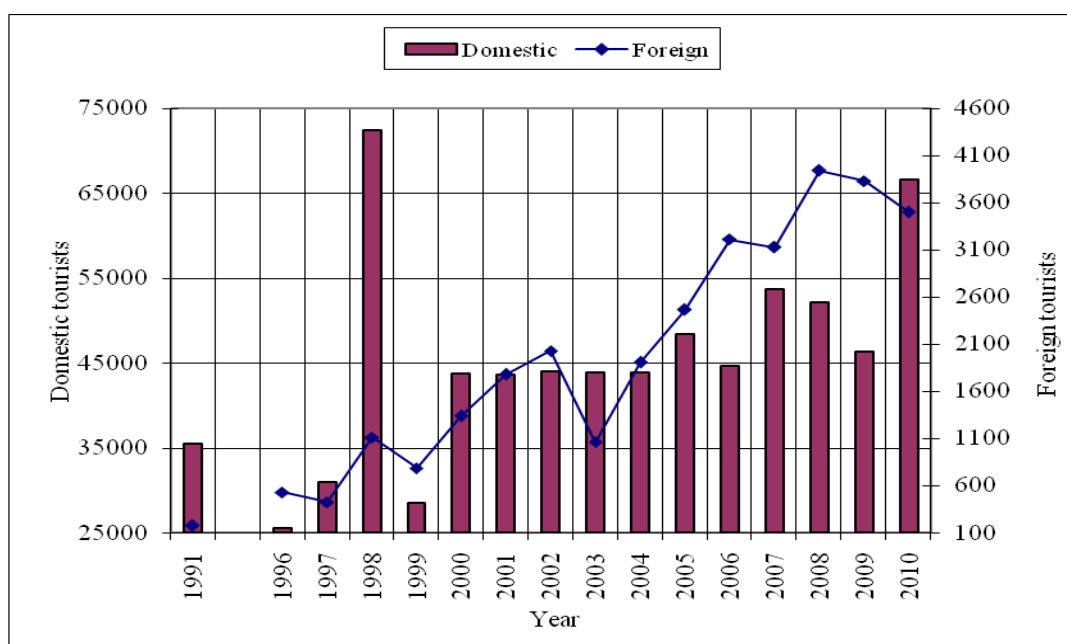
Graph 2 Changes of number of domestic and foreign tourists on the Tara Mountain at the end of 20th century and on the beginning of 21st century

The last results of new entrepreneurial initiatives have indicated some problems. The main problem have related on administrative division. Tara Mountain belongs to two municipalities (Bajina Bašta and Užice). Because of that, nature protection on the territory of Tara Mountain has often been hard [Dobričić, 2007]. Permanent adjusting of activities on the multi municipality's level is an imperative of sustainable development. Increasing the number of tourist can make negative influence on the quality of the nature. Work on the sustainable development must have a serious approach. Tourist potentials on the Tara Mountain are numerous and unique. Hence, development exclusive tourism is reasonable.
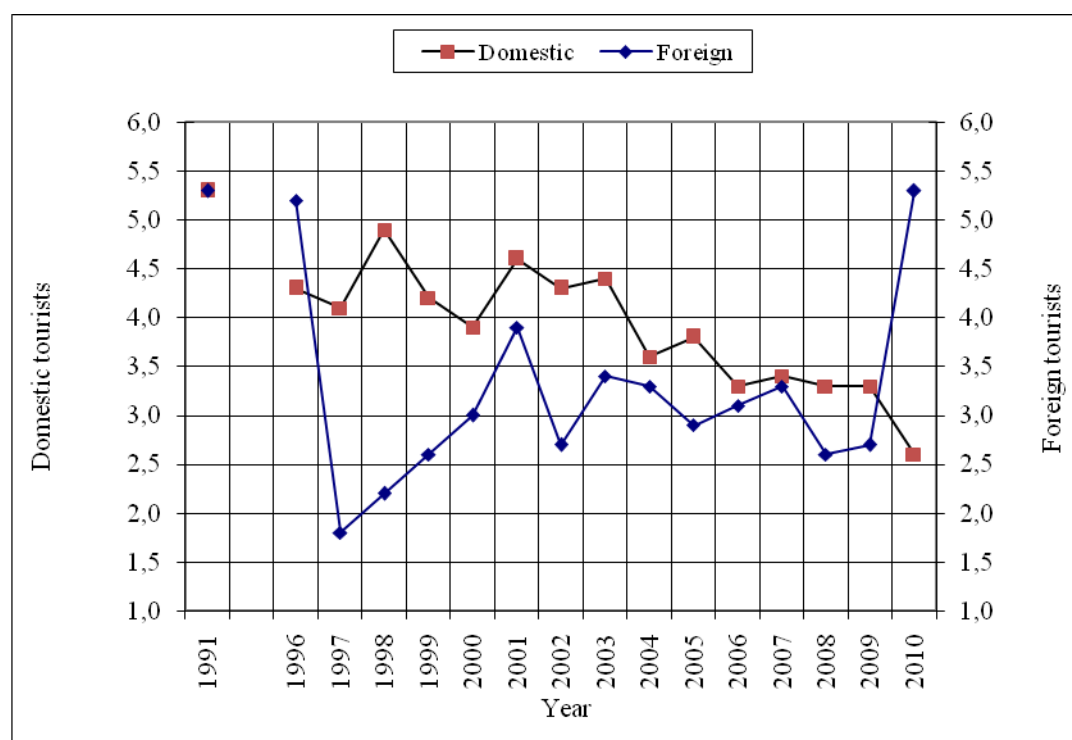
Graph 3 Changes of average number of overnight stays of domestic and foreign tourists on the Tara Mountain at the end of 20th century and on the beginning of 21st century

Well known destinations, which are situated in the protected areas, habitually remunerate visits. In the same time, they offer different thematic contents, products or services. Hence, for the future of development of Tara region, acceleration the transfer of experience on the field of interpretation and management of nature parks is very important. Master plan [2007] has defined five development zones in the Tara region: Predov krst, Bajina Bašta, Perućac, Kaluđerske Bare and Mitrovac (Figure).

On the base of analysis of situation, analysis of competitively and benchmarking, few tourist products of the region of Tara Mountain are defined: Health tourism – health and wellness, Touring, Business tourism – MICE, Mountain and lakes – during the summer and the winter, Special interests, Rural tourism, Short vacation.

From 2007 to 2016, about 185 million of euros of total investment are predicted by the Tara Master plan. About 80% is intended to the direct private investment. For the material basis, accommodation capacities and properties is intended about 75% of investments. Only 19% is intended for the tourist infrastructure and tourist attractions [Master plan, 2007].

THE SURVEY

The survey interviewed 60 respondents. According to gender, 42.1% respondents were female and 57.9% male. The majority of respondents were young, up to 35 years (41.7%), followed by 33.3% in the age group between 36 and 50 years, while the respondents with more than 50 years represented 25.0% of the sample. One-third (33.3%) of respondents had completed university levels of education.

Although tourists are able to evaluate a destination's attractiveness, they are less able to evaluate factors such as destination management or destination policy. Formica [2002] discusses that both experts' and tourists' evaluations of destination competitiveness could have the highest degree of accuracy.

The survey included three categories of respondents: locals, tourists and experts. Term "expert" has included following professions: tourism academics, postgraduate students on tourism management courses, tourist agency managers and hospitality sector managers. Everyone had been asked two common questions. How entrepreneurial initiatives contributed to the development of the Tara Mountain? Which entrepreneurial initiatives can improve the quality of

life on the Tara Mountain? The paper will give answers which the most repeated as well as the most interesting answers, according to opinion of authors.

The locals believe that only capital investment can raise the quality of life on the Tara Mountain. Under capital investments include more routes, with good infrastructure, better communications, and more hotels, which would bring more jobs. They think that the construction of new hotels could initiate a number of small family cooperatives that would be of service to them, so as to produce organic food and souvenirs, or provide various service activities. For the local population, the presence of foreign tourists is highly desirable. Foreign tourists are very few. Foreign tourists, who noted by statistics, are mostly people of Serbian descent living abroad and having foreign passports. Foreign tourists, the "real" as they called by locals, usually come in "Drvengrad" (Ger. Küstendorf, Wooden town) of Kusturica, and then they visit nearby station "Šargan Eight".

Tourists are different in origin, age, sex, occupation, level of educational attainment, etc. Survey of tourists gave the following information. However, the characteristic by which tourists mutually the most differ is the fact: if the first time on the mountain, or has previously visited. Most tourists who are interviewed (80%), the first time were on the Tara Mountain and did not sufficient inform about the past entrepreneurial initiatives. This suggests that the old entrepreneurial initiatives could be better presented. In this way, would enrich the content of the visit to this mountain. Perhaps the old entrepreneurial initiatives can become the inspiration for some new ones. A certain number of tourists, who were interviewed, were longtime visitors. In their view, the entrepreneurial initiative which consisted of increasing the number of accommodation in the private sector has contributed to the quality of service, has raised the standard of accommodation and attracts new visitors with the commercial "word of mouth". They agree that the obstacle to entrepreneurial initiatives is mountain peripheral position in relation to the main roads in Serbia. But thanks to him, the mountain is preserved. They agree in the fact that the mountain has different potentials, which resourceful entrepreneurs could well cash in tourist activity. They think that should improve road and rail links, in particular. Foreign tourists, fascinated by the mountain, highlight the need for heliport. They say that Tara is missing well marked hiking trails. Steep mountain side up to Bajina Basta town, allows to build funicular lifts, which could link foothill (where there are: accommodation facilities, well-stocked stores with consumer goods and other various and complementary facilities) and the Tara Mountain plateau. They believe that in this way the mountain will be better protected from all threats coming from the development of mass tourism.

According to experts, entrepreneurial initiatives have had a positive impact on the Tara Mountain. They have not yet seriously disturbed nature of the mountain. Experts say that Tara has 126 square km at an altitude of over 1000 m. However, most of the area consists of wavy plateaus with small angles of inclination and small differences in height. This is a limiting factor for the development of winter sports. In fact, it is inadequate for alpine skiing, but not Nordic skiing. It is necessary to improve the infrastructure and accommodation facilities, urban regulate the mountain and open the airport "Ponikve", then build: ski lifts, paddock for horses, golf terrains, paragliding airstrip. A few years ago, scientific meeting devoted to this mountain has been organized. On this occasion, scientists from different fields have discussed in detail about all the potential and importance of this mountain. They did not see any effect that has been achieved on this occasion. They agree that all ideas remain on paper only, if no investors. They say that it is essential that any entrepreneurial project should be under expert supervision, but point out that this rarely happens. They believe that the solution to this problem may lie in the legislation. They say that one should be careful with the development of various activities on the mountain, which, among other things, is a national park. It is essential that experts calculate sustainability capacity. Polluted or disturbed nature loses its attractiveness, which is primarily the initial motivation for any visitors.

CONCLUSION

Future of Tara Mountain is in development of small number of types of tourism movement, as winter tourism, rural, eco, excursion, educational and tourism of sport and leisure [Tomić et all, 2000, 199], [Obradović, Simić, 2004]. Woods of mountains are the lung of the country. Forest fruit and medicinal herbs are pharmacy of the country. Nature must be protected. Its utilization must be controlled. Incomes of tourism might be important. However, positive effects were observed by

repercussion with no doubt. It should be exceed using attentive and effectiveness management. Leading principle for development of tourism in the sensitive ecosystems is management of people and nature resources in order to improve the pleasure of visitors and minimize the negative influences from the development of tourism [Ćurčić, 1998].

The line is tiny between sustainable development and nature destruction. Every entrepreneurial initiative is welcome if it is in accordance with sustainable development. Revival of old crafts must be attractive for tourist and useful for local population. Old crafts can produce souvenirs and equipment for management of interior.

Generally speaking, mountains on the Balkan Peninsula are undeveloped and spaces with small density of population. But they have some precious and very rare things. They are rich in fresh and clear air and water which has excellent quality. Some of them, they have something more and attractive, like a Tara Mountain. It is hard to follow Tara pattern, because Tara beauty is unique. But, Tara Mountain becomes a good example of entrepreneurial initiatives on Balkan. Good and well devised entrepreneurial initiatives can used nature potentials and animate society in the mountain region.

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УДК 338

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Аннотация. Гора Тара находится на западной границе Сербии. Изучение ландшафта позволило провести сравнительный анализ привлекательных гор Сербии. Анализ определил показатели горы Тара в различных важных категориях (географической, туристской, т.д.). Литературные источники помогли проанализировать прошлые предпринимательские инициативы. Некоторые важные факты включены в опрос в форме интервью. Статья представляет предпринимательские инициативы в двух уровнях. «Временной уровень» делит предпринимательские инициативы на: время до социалистического периода, социалистический период, затем инициативы в период с 1991 по 199гг. и инициативы, начиная с переходного периода и периода перехода собственности. «Пространственный уровень» рассматривает предпринимательские инициативы с двух точек зрения. В зависимости от рельефа, разные предпринимательские инициативы нашли «место под солнцем» на разных позициях горы Тара и на разных уровнях высоты. В статье дается краткий обзор полов и профессий предпринимателей. Синтез результатов исследования показал общие характеристики предпринимательских инициатив. Данные, полученные в Статистическом бюро республики, были использованы для анализа потоков туристов за последние десять лет. Это позволило продемонстрировать последние результаты новых предпринимательских инициатив. В статье идет поиск ответов на следующие вопросы: Как предпринимательские инициативы способствовали развитию горы Тара? Какие предпринимательские инициативы могут улучшить качество жизни на горе Тара? Ответы были получены и сформированы с помощью опроса местных жителей, туристов и экспертов.

Ключевые слова: гора Тара; Сербия; предпринимательские инициативы; региональное развитие.

UDC 338

Quality of Tourism and Hospitality Management Systems in Russia

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Abstract. This article describes the features of quality standards (ISO), their application in Russia, analyzes Quality Awards, awarded to Russian producers, such as the Award of the Government of the Russian Federation in the field of Quality, National Tourism Award named after Yu. Senkevich, Travel Award «Golden Meridian», Moscow "Guiding Star" Award. The objectives of management system for Sochi resorts and hotels were determined.

Keywords: quality management standard; certification; Russian Quality Award; Travel Award «Golden Meridian».

Introduction. Services quality management in hotels and resort facilities (RF) involves the creation of quality systems that meet the guidelines of ISO 9000 and taking the necessary measures to ensure their efficient operation.

Quality systems performance means their development and implementation in the work of a company. Quality Management System (QMS) is the complex of interrelated and interacting elements, aimed at quality policy and goals work out and the achievement of these goals by coordinated actions on selection of its quality direction and control.

According to ISO 9000, companies must have the documentation for each transaction that affects the quality of the product and install the equipment only in accordance with the requirements.

Each part of the company must be certified separately. Certification of a company branch does not extend to the entire company.

Quality Management Standard (ISO 9004) describes the introduction of quality standards, direction for the development and application of ISO system. It describes basic elements of the quality system: requirements for the product and services, organization and control, serving the interests of a client, responsibility for products, system management.

More than three hundred thousand companies have certified their quality systems according to ISO 9000 standards by now.

There are only few in Russia, but their number increases. These standards have become the most popular in the history of ISO because of the significant promotional benefits they offer to the certificate holder over the nearest competitors.

Government Resolution from 12 April launched the Award of the Government of the Russian Federation in the field of Quality. It was the result of the large-scale set of works by domestic experts on the study and generalization of international experience on quality management and improvement of methods of its provision.

The award has been awarded annually since 1997 on a competitive basis for the achievement of significant results on products or services safety and quality provisions by a company, as well as the introduction of highly efficient methods of quality management. Maximum 12 awards are awarded per year.

Awards are issued by the Decree of the Government of the Russian Federation, which is published in the media. Companies participate in the competition for the right to win the prize on a voluntary basis.

Criteria for awarding are set in the Guide for Applicants, which is annually approved by the Council for Awards of the Government of the Russian Federation in terms of quality.

The model of the organization of the company, applying for the Russian Quality Award is characterized by nine criteria, giving the company (improvement) guidelines and guidance for its improvement. Contest participants are appraised by points in accordance with the model, including two groups of criteria.

The first group consists of five criteria and describes company capabilities. The second group consists of four criteria and characterizes the results.

Information should be provided separately for each component; it must be compressed, expressive and contain definite data.

All companies, having participated in the contest, get an assessment of the quality and recommendations for its improvement.

Introduction of the Russian Quality Award and the participation of industrial and service entities in the contest for the right to pick up this award, undoubtedly, intensify quality work in the country.

According to the principle of the Russian Quality Award, municipal and regional quality awards appear in many regions of Russia. They both serve as the basis for the participation in the national competition and promote the work on business quality improvement and competitiveness increase, mastering efficient modern methods of quality management in Russian companies.

The most prestigious awards in the field of tourist and hotel services quality are the following:

1. Yuri Senkevich National Tourism Award.

Yuri Senkevich National Tourism Award is prestigious and authoritative, the only non-profit award in travel industry, established by the Federal Agency for Tourism in 2002.

Its main objectives are: encouragement of governors and regional tourism authorities, improvement of competitiveness of Russia's tourism market participants, increase the quality of tourism education, promotion of charity activity, development of different types of tourism in the Russian Federation, assistance in expansion of international contacts, attracting media attention to the achievements of the domestic travel industry.

Enterprises, companies and representatives of the travel and hospitality industry, administrations of the constituent units of the Russian Federation, educational institutions, training specialists for the travel industry, cultural institutions, travel companies, management teams of national tourist offices, journalists and mass media can participate in the competition for the right to pick up the award.

2. «Golden Meridian» Travel Award.

«Golden Meridian» is awarded according to the results of Russian tourists' feedback and recommendations by industry experts. The award is a guarantee of high standards of tourist services and serve as guidelines to Russians in the variety of proposals by Russian and foreign companies.

National Award «Golden Meridian» reflects public recognition of the achievements of travel and hospitality industry participants, working with Russian tourists. The annual award was established to identify the best companies in travel industry.

«Golden Meridian» is the mark of quality at the tourist market.

3. Moscow Award «Guiding Star».

«Guiding Star» competition is the annual professional festival for the specialists of Moscow travel industry. The award was established in 1999 by Moscow Committee for Tourism in order to

improve the quality of tourist, sightseeing and hotel services in Moscow, form a positive image of the city as a world tourist center, help increase tourist flow to Moscow, improve efficiency of advertising and information work on forming attractive image of the capital.

Sochi resort and hotel businesses prior to the XXII Olympic and XI Paralympic Winter Games are actively involved in the development and implementation of quality management system and receiving international certificate ISO 9001:2000 on the render of resort (accommodation, catering, rehabilitation and remedial treatment) and hotel services, as well as picking up the prestigious Russian awards.

Hotel and resort facilities quality management system is focused on the consideration of the requirements of specified customers and continuous analysis of the efficiency of activities in accordance with the international standard ISO 9001:2000. It is aimed at achievement of the objectives, set by enterprise's policy in terms of work and service quality.

Sochi hotel and resort facilities quality management system is designed to ensure the system efficiency, meeting the requirements of consumers for services. Prevention of problems, rather than their solution afterwards is an important aspect.

Quality management system provides the solution of the following problems:
• achievement and maintenance of service quality, constantly satisfying the consumers' requirements;
• ensuring hospitality company's management team that service quality, technical and organizational facilities correspond to the planned ones; ensuring consumer (by providing evidence) that service quality meets his/her expectations, regulatory documents and contract terms;
- Continuous improvement of processes, based on objective measurement.

Planning and implementation of service quality requirements, stipulated by contracts and agreements is affected by fulfilling the requirements of quality management system documents, as well as by administrative procedures, executed by heads of departments.

Process approach is used by accommodation facilities of Olympic Sochi while implementing quality management system, namely: a) processes, required for quality management system are identified; b) processes sequence and interaction are set; c) criteria and methods for processes evaluation and improvement are established; d) resources and information, required for processes operation and monitoring are provided, and e) processes monitoring, measurement and analysis are accomplished; e) actions, required for the planned results achievement and continuous processes improvement are taken.

Quality management system of Sochi accommodation facilities is worked out in accordance with the requirements of IS ISO 9001:2000, with respect to the organizing structures, existing within facilities and various legal forms of ownership.

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УДК 338

Системы Менеджмента качества в индустрии
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Аннотация. В статье рассмотрены особенности стандартов качества (ISO), их применение в России. Проанализированы премии качества, присуждаемые российским производителям. Премия Правительства РФ, национальная туристская премия им. Ю. Сенкевича, туристская премия «Золотой меридиан», премия «Путеводная звезда» города Москвы. Определены задачи системы менеджмента для санаторно-курортных и гостиничных предприятий г. Сочи.

Ключевые слова: стандарт качества менеджмента; сертификация; Российская премия качества; туристская премия «Золотой меридиан».

Pedagogic Sciences

Педагогические науки

UDC 37

Effect of Menstrual Cycle on the Exercise Concert of Zambian Female Long Distance Runners

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Abstract. The Focusing of the study is to determine the effect of exercise during menstrual cycle on female long distance runners. The Main objectives of this study were to assess the effect of exercise concert at the period of menstrual cycle. The menstrual cycle do not affect muscle contractile characteristics. Most research also reports no changes over the menstrual cycle for the many determinants of maximal oxygen consumption (VO2max), such as lactate response to exercise, bodyweight, plasma volume, hemoglobin concentration, heart rate and ventilation. Therefore, it is not surprising that the current literature indicates that VO2max is not affected by the menstrual cycle. These findings suggest that regularly menstruating female long distance runners, competing in strength-specific sports and intense anaerobic/aerobic sports, do not need to adjust for menstrual cycle phase to maximize performance. For prolonged exercise performance, however, the menstrual cycle may have an effect. To evaluate that whether the exercise are harmful during menstruation or not, to assess what changes occurs before, during, and after menstruation, and to know the effects of menstruation upon personal performance A questionnaire was developed and distributed among the female long distance runners. The received responses of female long distance runners were tabulated and analyzed. Main findings were that exercises are not harmful during menstruation; personal performances are increased during bleeding days.

Keywords: Exercise concert; menstrual cycle; Effects; long distance runners.

INTRODUCTION

The recently increased popularity and quality of competition of women sports has drawn attention to the physiological responses of women to exercise. Of special interest is the relationship between athletics training and female menstrual cycle and reproductive function. In the past, it has been generally believed (without scientific evidence) that participation in strenuous exercises and sports during menstruation could be physiological harmful. Only recently has it been established somewhat clearer that vigorous athletic training and competition do not adversely affect the menarche, menstruation, or subsequent obstetric and gynecological history. All of these changes occur because of programmed fluctuations in hormone levels. Estrogen dominates during the follicular phase, and progesterone rules the luteal phase. Levels of both plummet sharply in the time preceding menstruation. But that's not all these hormones do. They can also cause changes in mood and other physical symptoms. Because of the sharp drop in hormone levels prior to menstruation, many women experience some of the following symptoms: Like Anxiety, Depression, Increased insulin responsiveness, Food cravings, Fatigue, Headaches Obviously, these symptoms can make exercising during your period unpleasant to say the least. But exercising can actually make your period more manageable, decreasing many of these symptoms.

It is safe and beneficial to exercise during your period. The women by virtue of her special role in the process of reproduction exhibit not only changes in degree in the distribution or character of the general body tissues but also peculiarities of form and function which are relevant to the context of sports and physical recreation Anemia is multifactorial; having a period doesn't necessarily make you anemic, he asserts. Being iron-deficient isn't equivalent to being anemic. "Females are likely to be more prone to iron deficiency because of the iron loss that occurs with the accrued blood loss from menstruation,"

According to Glowney explains. "Some also theorize there might be male to female differences in iron content ingested in diet too."Studies have shown that running can potentially cause any runner (regardless of gender) to lose iron through their gastrointestinal tract and even through their sweat, says Glowney, an endurance coach and former elite-level triathlete. Then there is the footstrike theory which suggests that runners lose iron when the red blood cells in their feet are broken during the pounding occurring when they run. A relatively new theory, Glowney reports, surmises that the peptide hepcidin, which decreases iron uptake, is secreted by the liver when the body recognizes itself in a state of acute inflammation. Eight to 10 hours after a hard race/training session the body will release hepcidin. So iron absorption for all runners is compromised after working at a high intensity.

STATEMENT OF THE PROBLEM:

While an uncomfortable and typically taboo topic for most men and some women, it's something that every woman runner needs to take into consideration when planning a training schedule and understanding running performance. And in order to grasp the important differences occurring during the phases, one has to first understand the menstruation cycle. The first day of the cycle is the first day of menses. Bleeding is usually complete by day 5 or 7. Days1-14 are called the follicular phase. By day 14 or 15, ovulation begins with a surge in estrogen and lutenizing hormone.

Many running articles focus on endurance female athletes with a heavy training load experiencing ammenoheric or irregular cycle issues. The research findings on the effects of a regular menstrual cycle, on average testing women ages 20-35, vary widely thanks in part to the rollercoaster of hormones. The timing of testing and the individual variability in estrogen and progesterone levels make testing a challenge. However, most studies agree on several key aspects.

Although understanding of the unique physiology of the female athlete has increased, there are still many questions to be answered. Endogenous and exogenous female sex steroids have been shown to influence various cardiovascular, respiratory, and metabolic parameters, but these changes probably have minimal impact on the ability of most recreational athletes to participate in and enjoy their sport. Statistically significant data may or may not have clinical or performance relevance. The effect of menstruation on the individual subject varies enormously in some individuals, the cycle progress throughout entirely without any apparent disturbance. While in others the changes are quite profound and may indeed be sufficient to give rise to regular periods of significance incapacity, in the majority of cases, the cycle gives rise to little apparent disability, though the physiological changes, which take place, may significantly affect human physical performance. For example, the weight gain associated with water retention during the premenstrual period will clearly be disadvantageous, also the feeling of dragging in abdomen as well as the fullness and discomfort felt in the breasts. Psychological changes are also demonstrable during the cycle. Showing considerable fluctuation in the level of intellectual and psychological performance capacity. Similarly, a statistically insignificant change may mean the difference between first and second place to an elite athlete. For an athlete concerned about maximizing performance, individual variability in menstrual cycle changes to various performance parameters must be considered. Thus the purpose of the study is to examine the effect of menstrual cycle on the exercise concert of Zambian female long distance runners

OBJECTIVES OF THE STUDY

1. To assess the effect of exercise on menstrual cycle of female long distance runners

2. To examine that either or nor the exercise are harmful during menstruation cycle.

3. To identify the Physiological & Psychological changes occurs before, during, and after menstruation of female long distance runners.

4. To know that effects of menstruation cycle influences in muscular strength and athletic performance.

HYPOTHESIS OF THE STUDY

1. It is hypothesized that the Physiological response to exercise of the long distance runner could differ before and during menstruation

2. It is presume that the Exercise on premenstrual and menstrual symptoms Change in blood volume due to light & rigid exercise

3. It hypothesized that Pain increases while performing Light exercise and rigid Exercise

4. It is assumed that the Performance increases at the time of menstrual cycle

LIMITATION OF THE STUDY:

• The study is carried out among the volunteers performing in long distance running.

• The study is investigated in the selected 5 colleges athletic competitions held in Zambia.
• The subjects are from various colleges in Zambia in the age group of 18 to 22

REVIEW OF RELATED LITERATURE:

The study by Kirchengast and Gartner (2002) stated that the effect of the menstrual cycle on WHR of thirty-two females. Of the thirty-two females, twentyfour (75%) were non-oral contraceptive (NOC) users and eight (25%) were oral contraceptive (OC) users. The NOC users were placed into three groups depending upon the length of their menstrual cycle: 27-30 days, 23-26 days, and 31-34 days. The OC users were group four. The results indicated a slight increase in body weight in all 13groups during the second half (~ ovulation to menstruation) of the menstrual cycle with the 27-30 day group and the 31-34 day group experiencing an increase in body weight. A change in WHR was also noted in the 27-30 day group with a decreased in WHR at the time of ovulation and then increased post ovulation, but remained low in comparison to the first day of menstruation until ovulation. Lack of significant changes in WHR may be due to subject error as each administered her own WHR measurement.

Thomas (2000) suggested that strenuous athletic training might affect the normal menstrual cycle. Such disruptions include delayed menarche in ballet dancers and gymnasts, shortened luteal phase and secondary amenorrhea associated with high training loads and competitive stress. Fluctuations in the steroid hormones have been associated with changes in muscle strength.

Giacomoni et al (2000) study imply no significant differences were observed among the three stages of the menstrual cycle in maximal jumping power, or maximal height of jump in menstrual discomfort. In menstrual symptoms, only maximal jumping power decreased by 8% in menstruation compared with that in midfollicular phase ($P < 0.05$). Although there were, no significant differences in maximal anaerobic performance during different menstrual cycle phases, results of the study suggest that the presence or absence of premenstrual or menstrual syndrome symptoms may have an effect, possibly through an action on the stretch-shortening cycle of tendons and ligaments.

Frankovich (2000). The periodic cycle of ovulation and menstruation produces not only local changes in the glands but also general psychological disturbances, which may be quite profound. The development of the embryo following conception alters not merely the women's general physiological behavior but also drastically modifies, although only temporarily, body structure particularly that of the abdomen. Nowadays females are taking part in sporting activities at large scale, and they are performing well. Menstrual cycle is unavoidable in female athletes; it has some physiological and psychological affects. Therefore, the need was to investigate the problem, but it was a difficult task to investigate because of the nature of topic, but it was happily done at last due to volunteer athletes. They gave their responses and it was become possible for researcher to draw conclusions in the light of those responses.

According to Goodman, 2009. The menstrual cycle. The menstrual cycle is characterized by changes in estrogen and progesterone levels driven by the endocrine system for the purpose of reproduction. The menstrual cycle is commonly divided into 2 phases, the follicular and luteal phases, which vary in duration between women but usually lasts 28 days. The first day of menstruation is usually referred to as day 1. During the early follicular phase (days 1-7) of the menstrual cycle, follicles in the ovary begin to mature. At this time, estrogen and progesterone concentrations are low. The levels of these hormones change during late follicular phase (days 9-14). Progesterone levels rise and estrogen levels reach its peak. Estrogen is secreted by the corpus luteum of the developing follicle, initially rises to stimulate the growth of epithelial cells of the endometrium and increase its thickness. Progesterone, also secreted by the corpus luteum, plays a role in differentiating cells of the endometrial lining and preparing the uterus for the implantation of the ovum. Progesterone also rises in response to the surge of the luteinizing hormone to decrease luteinizing hormone levels after its peak. The menstrual phase after ovulation is called the luteal phase. Both estrogen and progesterone concentrations are high during the midluteal phase (days 20-25). They serve to maintain the thickness of the endometrium. Eventually, the corpus luteum loses the ability to produce estrogen and progesterone, Texas Tech University, Melissa Mae R. Iñigo, May 2012 such that both ovarian hormone levels decline and the endometrium degenerates. This ultimately leads to menstruation, after which the body goes through the entire cycle again in a pre-menopausal woman.

Juworksi et al., (1981) No study has directly investigated the influence of the menstrual cycle phases in women with EIB. Rather, in healthy women, studies investigating the effect of menstrual cycle on exercise performance have been mixed. reported that after 40 minutes of submaximal cycling,

the time to exhaustion of the following cycling task at 90% of maximum cycling power output was significantly longer during the midluteal phase than the mid-follicular phase.

In contrast, Campbell et al. (2001) found that the 4 kJ/kg of body weight time trial results of moderately trained women, following a 2-hour long cycling task at 70% VO2max, was 13% faster during the follicular phase than luteal phase. Lastly, numerous studies have reported no difference between follicular and luteal phases in time to exhaustion during high-intensity exercise (Oosthuyse et al., 2010) and time trial (16 km) performance (McLay et al., 2007) when performed following prolonged exercise. Interestingly, Oosthuyse et al. (2010) observed that significant

RESEARCH DESIGN: This study was aimed at summarizing the effect of exercise during menstruation on female athletes. For the study 25 volunteer sports, girls were selected. These girls have participated in different sports at college level competitions.

For the collection of relevant information the researcher have prepared a closed form questionnaire containing 24 questions with the help of expert in the field and available literature, the questionnaire was divided in to three sections. The first section included Physiological responses to exercise throughout the normal menstrual cycle. The second section discusses the effect of regular strenuous exercise on premenstrual and menstrual symptoms. The third section deals with a topic that has attracted considerable research interest in the last few decades, which is personal performance during the menstrual cycle. The questionnaire was distributed and collected personally. The percentage of each question was calculated and presented in the form of table.

PRESENTATION AND ANALYSIS OF DATA:

Table: 1 Physiological response to exercise

S. No	Questions	Responses			
1.	**Regular menstruation**	Yes		No	
		77.77%		33.33%	
2.	**some sign of nervousness**	**Before menstruation**		**During Menstruation**	
		25.75%		32.38%	
3.	**During menstruation**	**lumbago**	**queasiness**	**Headache**	**sickness**
		63.65%	5.43%	10.11%	10.11%
4.	**Period of menstruation**	**4 Days**	**5 Days**	**6 Days**	**7 Days**
		21.21%	43.43%	21.12%	10.10%

Table: 1 According to respondent nearly 32.38% feels some sign of nervousness during menstruation and 25.75% feels sign of nervousness before menstruation therefore it is understood that some sign of nervousness could happen in performer before competition.

Table: 2 Exercise on premenstrual and menstrual symptoms

S. No	Questions	Responses			
1.	**Change in blood volume due to light & hard exercise**	**Light Exercise 1 & 2 days**		**Rigid Exercise 1 & 2 days**	
		Yes 44.44%	No 55.55%	Yes. 72.22%	No. 27.77%
		Light Exercise 3 & 4 days		**Rigid Exercise 3 & 4 days**	
		Yes 16.66	No. 83.37%	Yes. 27.77%	No. 72.22%
		Light Exercise 5 & 6 days		**Rigid Exercise 5 & 6 days**	
		Yes. 00%	No. 100%	Yes. 5.56%	No. 94.44%
2.	**Pain before, during, and after menstruation**	**Before cycle**	**During cycle**	**after cycle**	
		Yes / No	Yes / No	Yes / No	
		44.44 / 55.55	61.11 / 38.88	5.55 / 94.44	
3.	**Pain increases with**	**Light exercise**		**Rigid Exercise**	
		Yes / No		Yes / No	
		33.33 / 66.66		38.88 / 66.11	

Table: 2 According to respondent nearly 55.55% response that change in blood volume occurs due to light exercise and nearly 72.22% response that change in blood volume occurs due to hard exercise. Most of the respondents 61.11% accept that there is pain during cycle. Hence it is identified that there is impact in change of blood volume due to rigid exercise. And pain during menstruation.

Table: 3 Personal performance during the menstrual cycle

		First 2 days		3 & 4 days		5 & 6 days	
1.	**Performance increased**	Yes	No	Yes	No	Yes	No
		11.11	88.88	55.55	44.44	72.22	27.77
2.	**Performance decreased**	83.33	16.66	33.33	66.66	16.66	83.33

Table: 3 According to respondent 72.22% of performance increased on 5 &6 days during the menstrual cycle. Similarly 83.33% of performance is decreased on first 2 days. It is concluded that at time of menstrual cycle performance is increased in 5&6 days and performance decreased in first 2 days.

FINDINGS, CONCLUSION AND RECOMMENDATIONS:

Findings in the study

1. It is understood that some sign of nervousness could happen to the long distance runners before competition at the period of menstrual cycle therefore there is a possibilities that there is a change in their psychological behavior which leads to a poor performance.

2. It is identified that there is impact in change of blood volume due to rigid exercise. And pain during menstruation which also change their psychological pattern.

3. It is found that at time of menstruation first 2 day the performance is decreased and the performance increases after 5 & 6 days.

Conclusion

Sportswomen tend to be young, healthy, who must be able to maintain a steady, consistent performance of high quality in which even slight variations spell defeat. Their best performance are frequently achieved in those years during which sexual development is occurring, for once full development is complete the peak may be passed. Undoubtedly, the menstrual hormones play an important part in any sportswomen's career, but it is not possible to generalize about their influence. It is just as incorrect to say that all sportswomen are affected by menstruation, as it is to say that none is affected. For each woman the influence of menstruation is a personal and very individual effect, and the old adage "know thyself" is vital to success. The only way in which this essential knowledge can be obtained is by meticulous recording on personal menstrual chart of every variation in performance together with the dates of menstruation. It is then possible to discover whether performance is related to a particular phase of the menstrual cycle, and which hormone levels are most advantageous. Many sportswomen are Meso-morphs, and therefore not so markedly influenced by menstrual hormones. The incidence of menstrual disturbances among athletes appears to relate the type, intensity, and duration of the exercise performed. This probably accounts for much of the variability among athletic populations at the prevalent rate for amenorrhea. Several investigators note that menstrual disturbances are most common in athletes who are champions or who have the heaviest physical workloads. Distance runners appear to have more menstrual irregularities than those competing in other sports, although many sports have not been studied adequately.

Strenuous exercise can cause menstrual dysfunction, but many other factors may also be associated with athletic amenorrhea and thus increase a women's weakness to this condition. Low body weight and low body fat are most commonly associated with exercise-related menstrual disturbances, but other factors, such as emotional stress and dietary changes, may also be more stresses, as strenuous exercise, may disrupt cycle menstrual activity.

Recommendations

1. More studies has to be done in the menstrual cycle process that could help the sports competitor to achieve better performance while compete in various competitions.

2. The findings should observed by the athletic coaches, physical educators, and recreation providers may understand the problem at the time of menstrual cycle.

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УДК 37

Влияние менструального цикла на согласованность тренировок замбийских женщин-бегунов на длинные дистанции

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Аннотация. Исследование направлено на определение эффекта от тренировок женщин-бегунов на длинные дистанции во время менструального цикла. Основная задача исследования – добиться эффекта согласованности тренировок в период менструального цикла. Менструальный цикл не влияет на сократительные характеристики мышц. Большая часть исследований доказывает, что во время менструального цикла не происходит изменений большинства детерминант максимального потребления кислорода (VO2макс), таких как реакция лактата на упражнение, вес тела, уровень плазмы, концентрация гемоглобина, частота сердечных сокращений и вентиляция. Следовательно, неудивительно, что в современной литературе указывается, что менструальный цикл не влияет на VO2макс. Эти исследования предполагают, что женщины- бегуны на длинные дистанции с регулярным менструальным циклом, соревнующиеся в силовых и интенсивных анаэробных/аэробных видах спорта не должны приспосабливаться к менструальному циклу, чтобы усилить результативность. Тем не менее, менструальный цикл может влиять на длительное физическое выступление. Чтобы оценить, является ли физическая нагрузка вредной во время менструации или нет, оценить изменения, происходящие до, во время и после менструации и узнать влияние менструации на индивидуальную производительность, был разработан опросник и распространен среди женщин-бегунов на длинные дистанции. Ответы, полученные от женщин-бегунов на длинные дистанции, были внесены в таблицу и проанализированы. Основные результаты показали, что физические нагрузки во время менструации не вредны, а индивидуальная производительность во время менструации возрастает.

Ключевые слова: согласованность физических упражнений; менструальный цикл; эффекты; бегуны на длинные дистанции.

UDC 37

Influencing Factors of Science Olympiad Students' Success

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Abstract. This research aims to identify the main factors affecting the success of science olympiad students who participate in national and international science olympiads. The collected data is analyzed descriptively after conducting a developed survey. Survey was prepared based on twelve variables with three, four or five measuring items. Among six private high schools of Bosna Sema Educational Institutions in four different cities of Bosnia and Herzegovina, a total of 136 science olympiad students participated in the survey. SPSS program was used to analyze data. The results indicate extreme agreement levels for probable factors except slight agreement levels for technology use, supervisor, assessment and student's self efficacy.

Keywords: Olympiad students; success factors; Bosnia and Herzegovina; Bosna Sema Educational Institutions; survey.

1. Introduction

Success is not achieved by hard work alone. Instead, it is mixed with some organization, belief, and support from the beloved ones. According to Williams and Williams (2011), five key ingredients of student motivation are: student, teacher, content, method/process, and environment. So it's not the student alone who'll be able to achieve the desired success but the perfect combination of these factors all together.

Student himself/herself is the first factor in the path of success. Surland (2010), in his article emphasizes that there is a relationship between student self-efficacy and locus of control, and there is an increased academic persistence in high self-efficacy students. High self-efficacy moves you up to a point but to go further, you need a good supervisor. It may be thought that in this age of technology where e-learning tools are everywhere, there may not be a need for teachers so much. However, Eristi (2012) in his study confirms that students do not see e-learning applications as an alternative from learning a teacher. They absolutely prefer to learn from their teachers but in technology-aided learning environments (Eristi, 2012). Content must be in line with the student's interest. Another important factor is the method/process. Using the benefits of technology in the learning process should not be ignored. Ghaznavi, Keikha and Yaghoubi (2011) in their research showed that use of information and communication technology is effective in increasing educational motivation, improving questioning skills, improving research spirit and raising school marks. According to Shepkey et al. (2010), students' use of laptops outside of school for doing homework and playing learning games is a strong implementation mediator of achievement. Besides using technology in the learning process, the method used by the students highly affects the success. For example, Garcia et al. (2012) examines the self-assessment of students as a learning method and finds that the students who used to assess themselves become truly engaged in their learning process. Finally, the learning environment plays an important role in the success process. From the physical condition of the classroom to the friends, from the attitudes of school administrators to the family members there may be many factors structuring the environment. According to Ogunshola and Adewale (2012), the parental educational qualification has significant effect on the academic performance of the students. Tiantong and Teemuangsai (2013) study the students working together in collaborative groups, and find that the more they work together the more they understand, retain, and feel better themselves, their companions and collaborative environment encourages student responsibility for learning.

The main goal of this research is to examine the factors affecting the success of science olympiad students from mathematics, physics, and informatics attending private high schools in Bosnia and Herzegovina. The study wants to evaluate the variables including their own performance, family support, school atmosphere and administrative support, supervisor's role, and friendship on their success from the students' perspective. The second section presents the relevant literature. Next section provides information about the obtained data and used methodology. Therefore, the results of the analyses are presented and the paper is finally concluded.

2. Literature review
2.1 Technology Use
Yılmaz and Orhan (2010) studied internet usage of high school students for educational needs and according to him this need varies as we categorize students as "surface learners" and "deep learners". He defines surface learners as those who prefer to memorize things for a temporary success, while deep learners want to grasp the meaning of the course material. He founds that the relationship between internet usage for educational purposes and the will of deeply understanding the subject is high and deep learners use internet more to achieve that purpose while surface learners use it for non-educational purposes.

Yilmaz, Ulucan and Pehlivan (2010) aimed to determine attitudes and thoughts of the students attending physical education teaching program about using technology in education. They found that the students' use of technological materials in education affected the students' attitude scores in a positive way.

Ghaznavi, Keikha and Yaghoubi (2011) states that using information and communication technology is effective in increasing educational motivation, improving questioning skills, improving research spirit and raising school marks.

According to Shepkey et al. (2010), students' use of laptops outside the school for preparing homework and playing learning games is a strong implementation mediator of achievement.

2.2 Socio-Economic Status
Ogunshola and Adewale (2012) investigated parental socio-economic statuses and parental educational background and found that these factors do not have significant effect on the academic performance of the students. But according to their research, the parental educational qualification and health statuses of the students are identified to have significant effect on the academic performance of the students.

Assadi (2006) examined the influence of socio-cultural context on parenting style, academic achievement, and learning style in Tehran. He showed that child rearing method is correlated with learning method and academic achievement of children. Authoritative parenting breeds "theorist" learning style and assists better academic achievement.

Seydooğulları and Arıdağ (2012) made a research to examine the correlation between life satisfaction levels of high school students with parental attitude. They observed that there is a positive significant correlation between democratic parent attitude with the life satisfaction of students and those who have high life satisfaction scores also have high level academic achievement and high level of economic status.

2.3 Supportive Family Environment
Lekes et al. (2011) tested the need for supportive family environment for adolescents' endorsement of the value priorities that their mothers wish for them. Their research results revealed that the adolescent's basic needs for autonomy, relatedness, and competence at home are satisfied, the intrinsic values such as personal growth, close relationships, and community contribution are moderated between the mothers and adolescents. Otherwise adolescents are found to be paying more attention on the extrinsic values such as wealth, fame, and attractiveness.

Kovacevikj and Meschalikj (2005) aimed to examine relations of the school results and family characteristics of primary school students with behaviour disorders. They found that the educational inferiority of the parents and the poor socio-economic situation of the family have big influence on the school results in a negative way.

2.4 Supportive School Environment

According to Ching and Po (2013), a school principal's creative leadership influences both the school's development and the school's excellence and quality.

Altun and Yildiz (2011) claims that the school improvement includes collaborative activities and planned change to enhance the quality of teachers, staff, environment and physical conditions. They've concluded that giving emphasis to social and cultural activities as well as education and dealing with each pupil one by one are the key factors in achieving a high quality education in a school. They suggest that cooperation as compulsory in the school.

Oye et al. (2012) studied the importance of guidance and counseling program in secondary schools and reported that they are necessary for the students in order to increase their understanding of the educational, vocational and social information in making wise choices. They suggest that principals should make provision for guidance and counseling on the school time table in order to eliminate overwhelming ignorance of many young people on their choices of career prospects and personality maladjustment.

According to de Souza (2011), architecture of the school building affects the democratization of the education because most public schools have little or no space for collective activities.

2.5 School Management Support

Çelebi (2010) conducted a research about public high school teachers' opinions on school administrators' supervision duty. According to her findings, school administrators' supervision duty is not only paying attention to annual plans and classroom management of the teachers but more importantly encouraging his team of teachers for continuous professional development and by presenting "instructional leadership traits" be able to create a setting where all the members of the school learn from each other.

According to Gündüz and Balyer (2012), principals "sometimes" demonstrate effective leadership behaviors and they are generally good at planning the future of their school, however, they are not open to be criticized.

2.6 School Motivation

Dzikunu and Amoh (2010) investigated students' attitude towards social activities in some high schools in Ghana and found that social activities in school help to develop psychomotor skills of students and also help students by relaxing their mind. According to them, lack of equipment for social activities affects attitude. Their study revealed that students prefer off-campus social activities to on-campus activities, so they suggest that school authorities should improve equipment for social activities in order to sustain students' interest. They suggest inviting professionals of social activities such as pastors, artists, sportsmen and women to interact with students.

According to Hohepa, Scragg, Schofield, Kolt, and Schaaf (2007), parents and friends are the key social influencers of physical activity during adolescence when parents, friends, and schools are considered. They emphasis the importance of proximal social networks on youth activity which should be considered when developing policies and programs looking to promote physical activities among young people.

Suh and Kim (2011) examined the relationship between Participation in Organized Activity and Cross-Group Friendships. The results of their study indicated that school-based extracurricular activities significantly influence the formation of cross-group friendships among young adults. They also found that participating in meaningful activities positively influences cross-group interactions and contact. They moreover identified that participants have intention to discover unnoticed similarities and cultural ethnic differences while forming cross-group friendships.

2.7 Supervisor

According to Eristi (2012), gifted students expect have teachers who can both guide students and provide information. Furthermore, he suggested that gifted students do not consider e-learning applications as an alternative for teachers. They are identified to prefer learning from their teachers but in technology aided learning atmospheres.

Lalić (2005) suggests encouragement for creating a positive social and emotional atmosphere, a positive learning environment, using preventive techniques in some discipline-related situations, some interventions to deal with behavioral problems of students and to strengthen students self-confidence. She identified that teachers prefer less encouragement when the students grow. She suggests training teachers about using encouragement under different circumstances.

Eristi (2012) investigated gifted students' opinions about learning and teaching and their understandings about teacher characteristics and teaching. He observed that the gifted students expect knowledgable, understanding and fair teachers.

2.8 Group Engagement

According to Legault, Green-Demers and Pelletier (2006), students are demotivated in school befacuse of four factors including their ability beliefs, effort beliefs, value placed on academic tasks, and characteristics of the academic tasks.

Williams and Williams (2011) emphasized that there are the five key ingredients impacting student motivation including student, teacher, content, method/process, and environment.

Shernoff et al. (2003) conceptualized student engagement based on the culmination of concentration, interest, and enjoyment. They found that student engagement is influenced by the culmination of concentration, interest, and enjoyment. They suggest that the engagement can be increased by learning activities which support students' autonomy, and by giving appropriate level of tasks to the students' skills.

2.9 Assessment

According to Garcia et al. (2012), as students assess themselves, they get truly engaged in their learning process.

Balkan, Nacar and Mazicioglu (2007) aimed to determine the learning strategies of students and to evaluate the effect on their success. Their research reveals that students who take notes and underline the important points when they are reading or listening were found to be more succesful. Students who overview the previous lesson, prepare questions about the course before the lesson and ask the unclear points in the lesson were found to be more successful.

2.10 Team Self-Efficacy

Katz-Navon and Erez (2005) claim that collective-efficacy effects team performance only when there is a highly interdependent task which requires the team members' close interaction and coordination of their efforts. According to them, under low task interdependence, collective-efficacy is not significant influence on individual performance. They however identified that self-efficacy influences individual performance under low task interdependence conditions.

According to Lavasani, Afzali and Afzali (2011), cooperative learning methods compared to traditional methods are highly influential on the social skills of students.

Ševkušić-Mandić (2003) suggests that effective cooperative learning is only possible if the teachers apply the five basic elements of cooperative structure including 1. structuring the learning task and students' positive interdependence, 2. individual responsibility, 3. Enhancing "face to face" interaction, 4. increasing students' social skills, and 5. Evaluating group processes.

2.11 Student Self-Efficacy

According to Robin Surland (2010), high self-efficacy of students enhances their problem-solving skills in order to overcome obstacles in school. According to Zajacova, Lynch and Espenshade (2005), academic self-efficacy and stress are negatively correlated.

Hosein-Nejad (2008) conducted a study to determine the role of self– efficacy on the dietary behaviors of high school girls and identified that increased self–efficacy methods and good model offer can be influential on the health behaviors.

2.12 Benefits

Tiantong and Teemuangsai (2013) claim that using collaborative learning is useful in order to enhance learning achievement and social skills. They reported that students in collaborative groups

can understand, retain, and feel better about themselves and their peers more. They also suggested that working together in a collaborative environment encourages student responsibility for learning.

According to Fredricks and Eccles (2005), students in school-based extracurricular activities can have more academic and prosocial friends. They suggest being involved in a prosocial peer network enhances activity participation with school engagement and decreases depression by providing social support, by teaching social skills, and by reducing alienation.

Wilson (2009) claims that the students participating in out-of-school activities often have higher grades, less attendance, and an increased commitment to the school. He suggests that extracurricular activities can enhance student self-esteem and school spirit.

3. Research Methodology
3.1 Scale development
While developing the survey items, the following works are referred.

Table 1. List of dimesions and references.

No	Dimensions	References
1	Technology use	Yılmaz and Orhan (2010), Yilmaz, Ulucan and Pehlivan (2010), Ghaznavi, Keikha and Yaghoubi (2011), Shepkey et al. (2010)
2	Socio-Economic Status	Ogunshola and Adewale (2012), Assadi (2006), Seydooğulları and Arıdağ (2012),
3	Supportive Family Environment	Lekes et al. (2011), Kovacevikj and Meschalikj (2005),
4	Supportive School Environment	Ching and Po (2013), Altun and Yildiz (2011), Oye et al. (2012), de Souza (2011)
5	School Management Support	Çelebi (2010), Gündüz and Balyer (2012)
6	School Motivation	Dzikunu and Amoh (2010), Hohepa, Scragg, Schofield, Kolt, and Schaaf (2007), Suh and Kim (2011)
7	Supervisor	Eristi (2012), Lalić (2005), Eristi (2012)
8	Group Engagement	Legault, Green-Demers and Pelletier (2006), Williams and Williams (2011), Shernoff et al. (2003)
9	Assessment	Garcia et al. (2012), Balkan, Nacar and Mazicioglu (2007),
10	Team Self-Efficacy	Katz-Navon and Erez (2005), Lavasani, Afzali and Afzali (2011), Ševkušić-Mandić (2003)
11	Student Self-Efficacy	Robin Surland (2010), Zajacova, Lynch and Espenshade (2005), Hosein-Nejad M. (2008)
12	Benefits	Tiantong and Teemuangsai (2013), Fredricks and Eccles (2005), Wilson (2009)

3.2 Explanations of dimensions

Technology Use refers using technology in order to enhance their knowledge and skills.

Socio-Economic Status is an important factor affecting the success of students. The money that the parents earn enough in order to support their children's expenses, preparing a technically and psychologically comfortable atmosphere at home, may increase the students' success significantly.

Supportive Family Environment enhances student's success by providing support in family environment.

Supportive School Environment is helpful to the student by providing the necessary conditions inside the school.

School Management Support is necessary in order to overcome the barriers inside and outside the school environment.

School Motivation increases the success of students by setting their target in order to enhance school success.

Supervisor is very influential on student success by helping through the process.

Group Engagement can increase the benefits of a student if he/she is involved with the group members.

Assessment plays a major role in students' learning and their motivation in learning.

Team Self-Efficacy enhances the team performance. A team capable of working together and having necessary skills can be a successful team.

Student Self-Efficacy increases the student's belief by challenging himself with difficult tasks and his/her intrinsic motivation.

Benefits refer to gaining a lot of experience, improved technical and social skills, and improved knowledge and self-esteem.

4. Data and Methodology

Data was collected only from science olympiad students attending high schools of private educational institution called "Bosna Sema" located in Bosnia and Herzegovina. The survey was conducted in six different high schools of the mentioned institution located in four different cities of Bosnia and Herzegovina. The science olympiad students from mathematics, physics, and informatics participated in the survey.

The surveys were distributed in the form of hard copy only. 136 survey forms were filled, and 132 of them were evaluated since 4 copies were not worth considering because of many unfilled sections. Response rate of 98.6% (136/138) was achieved from distributed surveys. 138 was the maximum number of students who prepare for the science olympiads at the Bosna Sema Educational Institutions.

Collected data is numerical except demographics part which is categorical. Five point Likert scale was preferred in order to test the agreements of the respondents on twelve variables with forty-nine questions. The collected data then inserted into an excel spreadsheet and analysed descriptively via SPSS.

5. Results

5.1. Demographics

Demographics information includes student's grade, gender and age. The survey is responded by 78 males and 52 females with 2 no response for the gender. The grades of the students range from 9th to 12th. It was observed that the students were from mainly 9th grade (51 students) and this number is followed by 10th, 11th, and 12th graders respectively. The age of the students varies between 14 and 19 but most of them are 16 years of old.

5.2. Survey Results

From table 2, it is possible to conclude that students use technology in order to achieve necessary information for their subject but they are slightly using technologic tools to enhance their understanding and to test their knowledge.

Table 2. Technology use

1 Technology Use	Mean	Std. Deviation
We use technologic tools in order to enhance our understanding	3.83	1.072
We use technology in order to achieve necessary information for our subject	4.05	0.888
We use technology to test our knowledge	3.5	1.276

According to the results, the surveyed students are technically and psychologically comfortable at home to a great extend. But, it is observed that the parents earn enough to support their expenses (Table 3).

Table 3. Socio-economic status

2 Socio-Economic Status	Mean	Std. Deviation
My parents earn enough to support all my expenses	3.92	1.071
I feel technically comfortable at home	4.55	0.658
I feel psychologically comfortable at home	4.8	0.436

The results revealed that the students have real supportive family environment where members of the family try to increase each other's achievements, try to remove difficulties all together and have domestic democracy where everyone can state his/her idea comfortably. However, there is detected to have slight involvement in the same activity by the members of the family (Table 4).

Table 4. Socio-economic status

3 Supportive Family Environment	Mean	Std. Deviation
Family members try to increase each other's achievements	4.37	0.796
Family members love to be involved in the same activity	3.76	1.008
When one family member has a difficulty, we try to remove it together	4.46	0.797
Every family member comfortably can state his/her idea	4.44	0.851

The findings of this research identified that there is a supportive school environment according to the students. They rate their schools as technically and socially competent and has supportive conditions for their development. They also seemed to be feeling the school support. However, they moderately agree that their school has an innovative approach towards them (Table 5).

Table 5. Supportive school environment

4 Supportive School Environment	Mean	Std. Deviation
I feel the support of School management on the issues related to my success	4.02	0.988
There is an innovative approach to the students in the school	3.91	0.851
My school conditions are supportive for my development	4.22	0.853
My school is technically competent in order to support my success	4.37	0.756
My school is socially competent in order to support my success	4.14	0.958

The results revealed that the students extremely feel that their schools can afford olympiad preparation costs and put olympiads among the first in their agenda. They confirmed that school management gives a suitable study environment, arranges training programs and hires mentors for them in order to manage the olympiad preparation (Table 6).

Table 6. School management support

5 School Management Support	Mean	Std. Deviation
School Management provides a suitable study environment for my Olympiad preparation	4.03	0.907

School Management arranges training programs for my Olympiad preparation	4.3	0.932
School Management hires mentors to manage my Olympiad preparation	4.05	1.108
School Management can afford Olympiad preparation costs	4.44	0.715
School Management puts Olympiad studies among its priorities	4.3	0.709

According to the results, the students extremely feel that their schools are motivated for success in terms of efficiency, effectiveness, agility and innovativeness (Table).

Table 7. School motivation

6 School Motivation	Mean	Std. Deviation
My school wants to be efficient in its activities	4.59	0.641
My school wants to be effective in its activities	4.56	0.621
My school wants to be innovative in its activities	4.42	0.773
My school wants to be agile in its activities	4.26	0.796

The results identified that the performances of the supervisors are rated well when their supervising ability and encouragement are considered. However, they are observed to be slightly well role model for the students and involved in all stages of their studies (Table 8).

Table 8. Supervisor

7 Supervisor	Mean	Std. Deviation
My supervisor can easily lead my preparation for the Olympiads	3.91	1.096
My supervisor is a role model for me	3.32	1.277
My supervisor is involved in all stages of my study	3.33	1.321
I always feel my supervisor's encouragement	3.71	1.262

Students are observed to be extremely motivated for success, their friendship is detected to be high and they are seemed to be satisfied with the group atmosphere (Table 9).

Table 9. Group Engagement

8 Group Engagement	Mean	Std. Deviation
We (Olympiad students) are motivated for the success	4.25	0.832
All the group members friendly approach to each other	4.23	0.938
We (Olympiad students) are all satisfied with studying atmosphere.	4.05	0.868

The results presented that the students slightly have initial strategy and plan to perform their studies and assessed their knowledge regularly. However, they are highly agreed that they studied again after making necessary assessment about their studies (Table 10).

Table 10. Assesment

9 Assessment	Mean	Std. Deviation
I prepared myself according to an initial strategy	3.83	0.904
I planned the stages of my study from the very beginning	3.5	1.026
I assessed (tested) my knowledge regularly	3.89	0.942
After checking and assessing my knowledge, if necessary I re-studied certain subjects	4.11	0.847

According to Table 11, it is observed that the olympiad teams are highly capable of working together, have necessary skills, are aware of their studies, technically competent and knowledgeable.

Table 11. Team self-efficacy

10 Team Self-Efficacy	Mean	Std. Deviation
Our team is capable of working together	4.14	1.01
Team has necessary skills to complete a study	4.13	0.886
Team members are aware of the issues related to their studies	4.06	0.854
Team members are technically competent for their studies	4.21	0.791
Team members are competent with the necessary knowledge for their studies	4.32	0.765

When self-efficacy of the students is considered, it is identified that they are slightly capable of preparing for the olympiads, achieving the necessary information and resources and managing time for olypiad activities by themselves (Table 12).

Table 12. Student self-efficacy

11 Student Self-Efficacy	Mean	Std. Deviation
I am able to prepare for the Olympiads by myself	3.42	1.049
I can achieve the necessary information by myself	3.55	0.944
I can manage my time for Olympiad activities	3.92	0.93
I can reach the necessary resources by myself	3.73	0.925

It is observed that science olympiad students have extremely gained benefits by enhancing their experience, improving technical and social skills, knowledge and their self-esteems (Table 13).

Table 13. Benefits

12 Benefits	Mean	Std. Deviation
We together gained a lot of experience at the end of Olympiad studies	4.54	0.67
Our technical skills are improved	4.28	0.911
Our social skills are improved	4.03	1.118
Our knowledge has improved	4.61	0.706
Our self-esteem has improved	4.25	0.928

6. Conclusion

This study results in general provide a high positive agreement level of science olympiad Students except slight agreement with their technology use, supervisors, assessment and their self-efficacy.

It can be suggested that they should increase the use of technology to enhance their success. Among the six high schools of this institution, three of the schools where located in the capital city of Sarajevo, have no insufficiency about having equipped supervisors since these schools are using their graduated olympiad students as their supervisors and these supervisors are teaching all three schools students located in the capital. On the other hand, among rest of the three schools where located in three different cities, two of them are new and have no graduates yet to help them as supervisor, and the other one is located in a border town where its graduates do not have oppurtunity to attend a good university there and prefer capital city of Bosnia and Herzegovina or other countries to study. So this third school, although old enough to have a lot of graduates, does have difficulty in supporting them with supervisors because graduates leave the town as they finish their school. So, they hire supervisors from other schools and appearently students are not satisfied with the performance of those non-family members. Therefore, the institution can find another way to supervise the students in those schools such as frequently arranging preparation camps in the capital city and employing distance supervising techniques to enhance their performance.

The institution can arrange frequent assessment meetings and exams in order to make them always ready. Moreover, Bosna-Sema Institution should increase the self-efficacy of the students.

The students who are participated the survey were selected from the same private institutions' high schools and these institutions were famous with being successful in the national and international science olympiads in the Bosnia and Herzegovina. So, the main purpose of the survey was to determine the stregth of the factors influencing this success. The high agreement levels for the selected items show that the study has become succesful by employing the necessary measurements in the study. Therefore, the future studies may consider the same items for different institutions.

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Appendix

Olympiad Study Survey

For each numeric question, circle the number that best reflects your opinion of the factor judged
1=strongly disagree, 2=disagree, 3=moderate, 4=agree, 5=strongly agree
Circle only one number for each scale.

Demographics		
a	Your grade:	
b	Gender: a) Male b) Female	
c	Age:	

1. Technology Use		**Agreement Level**
1	We use technologic tools in order to enhance our understanding	1 2 3 4 5
2	We use technology in order to achieve necessary information for our subject	1 2 3 4 5
3	We use technology to test our knowledge	1 2 3 4 5

2. Socio-Economic Status		**Agreement Level**
1	My parents earn enough to support all my expenses	1 2 3 4 5
2	I feel technically comfortable at home	1 2 3 4 5
3	I feel psychologically comfortable at home	1 2 3 4 5

3. Supportive Family Environment		**Agreement Level**
1	Family members try to increase each other's achievements	1 2 3 4 5
2	Family members love to be involved in the same activity	1 2 3 4 5
3	When one family member has a difficulty, we try to remove it together	1 2 3 4 5

4	Every family member comfortably can state his/her idea	1 2 3 4 5

4. Supportive School Environment		Agreement Level
1	I feel the support of School management on the issues related to my success	1 2 3 4 5
2	There is an innovative approach to the students in the school	1 2 3 4 5
3	My school conditions are supportive for my development	1 2 3 4 5
4	My school is technically competent in order to support my success	1 2 3 4 5
5	My school is socially competent in order to support my success	1 2 3 4 5

5. School Management Support		Agreement Level
1	School Management provides a suitable study environment for my Olympiad preparation	1 2 3 4 5
2	School Management arranges training programs for my Olympiad preparation	1 2 3 4 5
3	School Management hires mentors to manage my Olympiad preparation	1 2 3 4 5
4	School Management can afford Olympiad preparation costs	1 2 3 4 5
5	School Management puts Olympiad studies among its priorities	1 2 3 4 5

6. School Motivation		Agreement Level
1	My school wants to be efficient in its activities	1 2 3 4 5
2	My school wants to be effective in its activities	1 2 3 4 5
3	My school wants to be innovative in its activities	1 2 3 4 5
4	My school wants to be agile in its activities	1 2 3 4 5

7. Supervisor		Agreement Level
1	My supervisor can easily lead my preparation for the Olympiads	1 2 3 4 5
2	My supervisor is a role model for me	1 2 3 4 5
3	My supervisor is involved in all stages of my study	1 2 3 4 5
4	I always feel my supervisor's encouragement	1 2 3 4 5

8. Group Engagement		Agreement Level
1	We (Olympiad students) are motivated for the success	1 2 3 4 5
2	All the group members friendly approach to each other	1 2 3 4 5
3	We (Olympiad students) are all satisfied with studying atmosphere.	1 2 3 4 5

9. Assessment		Agreement Level
1	I prepared myself according to an initial strategy	1 2 3 4 5
2	I planned the stages of my study from the very beginning	1 2 3 4 5
3	I assessed (tested) my knowledge regularly	1 2 3 4 5
4	After checking and assessing my knowledge, if necessary I re-studied certain subjects	1 2 3 4 5

10. Team Self-Efficacy		Agreement Level				
1	Our team is capable of working together	1	2	3	4	5
2	Team has necessary skills to complete a study	1	2	3	4	5
3	Team members are aware of the issues related to their studies	1	2	3	4	5
4	Team members are technically competent for their studies	1	2	3	4	5
5	Team members are competent with the necessary knowledge for their studies	1	2	3	4	5

11. Student Self-Efficacy		Agreement Level				
1	I am able to prepare for the Olympiads by myself	1	2	3	4	5
2	I can achieve the necessary information by myself	1	2	3	4	5
3	I can manage my time for Olympiad activities	1	2	3	4	5
4	I can reach the necessary resources by myself	1	2	3	4	5

12. Benefits		Agreement Level				
1	We together gained a lot of experience at the end of Olympiad studies	1	2	3	4	5
2	Our technical skills are improved	1	2	3	4	5
3	Our social skills are improved	1	2	3	4	5
4	Our knowledge has improved	1	2	3	4	5
5	Our self-esteem has improved	1	2	3	4	5

Comments and Suggestions about this survey study

Факторы, влияющие на успех студентов-участников научных олимпиад

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Аннотация. Цель данного исследования – определить основные факторы, влияющие на успех студентов-участников научных олимпиад, принимающих участие в национальных и международных научных олимпиадах. Полученные данные были тщательно проанализированы после проведения развернутого исследования. Исследование было разработано, основываясь на двенадцати переменных с тремя, четырьмя и пятью измерительными позициями. Среди шести частных вузов образовательных учреждений Босна Сема в четырех городах Боснии и Герцеговины, всего 136 студентов-участников научных олимпиад приняли участие в исследовании. Программа SPSS была использована для обработки данных. Результаты показали экстремально высокий уровень влияния возможных факторов, кроме небольшого уровня влияния использования технологий, куратора, оценки и веры студента в собственные силы.

Ключевые слова: студенты-участники олимпиад; факторы успеха; Босния и Герцеговина; образовательные учреждения Босна Сема; исследование.

Philological sciences

Филологические науки

UDC 81

The formation of Udi plurals

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Abstract. The East Caucasian languages are marked for rather heterogeneous strategies to form plurals. Typically, we observe larger sets of allomorphs that reflect at least in parts older strategies of semantic-based nominal subcategorization. In addition, we have to refer to distributional criteria related to the phonotactics of the given nouns. The present paper offers a closer inspection of plural formation in Udi and Caucasian Albanian, a possible ancestor of Udi, both from a synchronic perspective and diachronic perspective.

Keywords: East Caucasian; morphology; plural formation; allomorphs.

1. INTRODUCTION

Udi is a minority language in Azerbaijan that belongs to the East Caucasian language family. More precisely, it can be classified as a member of the Southeast Caucasian (Lezgian) branch, having developed from an Eastern Samur variety of the proto-language. Udi is spoken by some 4.000 people, mainly in the village of Nij (*niˤẑ*) in Northwestern Azerbaijan. Some Udi speakers still live in the adjacent village of Vartashen (now Oguz), although the bulk of Vartashen Udis left the village in 1989/90 and fled to places in Northern Armenia, Russia, and Kazakhstan in the context of the Armenian-Azerbaijani conflict. Already in 1922, a group of Udis from Vartashen has migrated to Eastern Georgia and has founded the settlement Zinobiani/Oktomberi. Historical evidence suggests that before 1832, Udi had been spoken in a wider ensemble of villages and settlements, including Vardanlu, Mirzabeily, Sultan-Nukha, Dzhurlu, Malykh, Engikend, Ermanit, Mukhants, Oraban, Kungüz, Kutkashen (Qəbələ), Kormukh, Gish, and Bum. Today, the village of Nij is marked for a rather compact Udi population (plus two Azeri quarters). Of the 14 quarters (*mahalla*), namely Falčilli, Mančili, Aǧdaläkli, Melikli, Ferimli, Malbel, Vezirli, DaläkliČirmählä, Daramählä, Darabağ, Goǯibeyli, Yalgašli, and Abdalł, only the last two are inhabited by Azeris. The situation in Vartashen had been rather different from this pattern: Toward the end of the 19th century, the majority of Vartashen inhabitants was formed by Udis and Armenians. Additionally, there had been Christian Tātīs, Jewish Tātīs, Lezgis, and Azeris. The number of Azeris gradually increased in the 20th century [1].

Udi's closest relative is Caucasian Albanian ([2], [3], [4] for details). However, we cannot claim that Udi is an immediate descendant from Caucasian Albanian [4]. Linguistic evidence from CA suggests that Udi is an off-spring of a dialectal variant of the language documented in the palimpsests (or even of a distinct language). Both CA and Udi are marked for innovations not common to both languages. From that it follows that both varieties (Caucasian Albanian and 'Early Udi' must have developed out of a common language that again was an early off-spring of Eastern Samur. Graphic (1) illustrates the position of Udi within the world of Lezgian languages schematically:
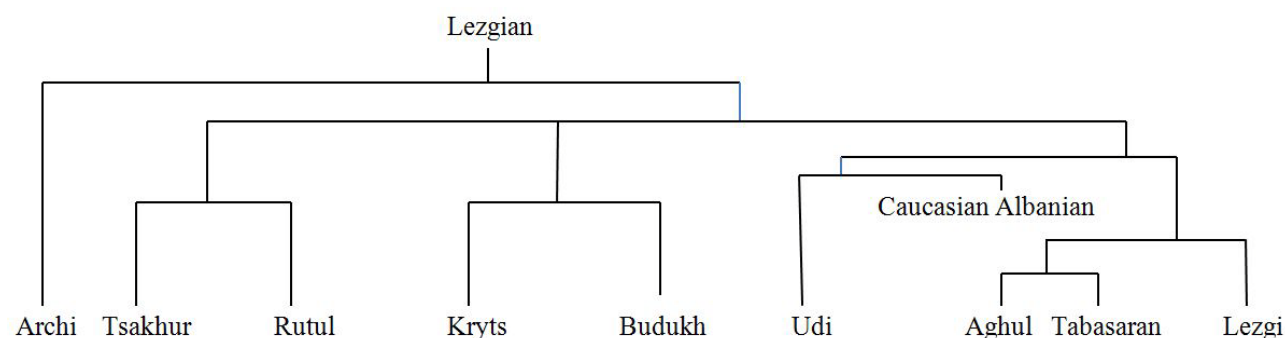
Graphic 1: *The Lezgian languages*

Udi is marked for various substrates and adstrates some of which do not show up in other languages as expressively as in Udi. This holds especially for the long-standing contact with Armenian and Northwest Iranian since Antiquities. In addition, Persian and Azeri have played a crucial role in the formation of Udi grammar and lexicon.

In my paper, I want to address of specific question of Udi grammar, namely that of number marking (see [5] for a general typology of number marking). This feature not only is a relevant parameter concerning the historical grammar of the East Caucasian languages less sufficiently described for quite many East Caucasian languages, but also an indicator of possibly underlying strategies of nominal categorization (especially, if number marking shows up as a set of allomorphic forms). In Udi, number marking is derivational rather than inflectional. It can modify the referential semantics of nominal stems both in a quantitative and qualitative respect. Number is morphological with most 'object-oriented' referential words, both basic and derived, but lexical with lexemes that cover the domain of communicative reference (personal pronouns). Prototypically speaking, Udi has only two numbers: Singular (unmarked) and plural (marked). Dual strategies can be identified with certain reduplicating nouns that refer to paired body parts. Except for one case, a singulative is not expressed morphologically, but lexically, using the numeral *sa* 'one' that precedes the noun in question.

2. MATERIALS AND METHODS

The data referred to in this brief presentation stem from various sources that deal with the grammar of Udi (e.g. [6], [7], [8], [9], [10], [11]) as well as from texts, own fieldwork notes, and lexical material ([12], [13]). Methodologically, I follow the standards of descriptive grammar and language typology (supplemented by some arguments stemming from Cognitive Linguistics).

3. DISCUSSION
3.1 Basic patterns of plural formation.

Plural marking in Udi is suffixal. It is characterized by a high degree of allomorphy. This feature is also present with most other Lezgian languages and should be related to plural marking techniques in Proto-Lezgian. In Udi, the plural allomorphs are conditioned lexically: The whole set of plural markers is distributed according to both semantic and formal characteristics of the nominal stem. However, the formation of a plural noun is not always predictable from a synchronic point of view. In many cases, the given allomorph reflects earlier criteria of selection. In addition, for some words more than one plural marker can be described. In composition, the final lexeme determines the choice of suffix.

In principle, Udi can be described as a set noun language. By this is meant that the basic term usually refers to a given set of elements, not to an individual element of this set (see [14] for this typology]). This can inferred, for instance, from the fact that plural markers usually lack (especially with non-human referents, when counted (e.g. *bip' ǧel/xod/źeˤ* 'four sheep/trees/stones' etc.). Also, personal agrrement on the verb is usually in the singular in such instances (*me p'aˤ źeˤ biˤbiˤ-ne* 'these two stones are heavy' (lit: 'this two stone is heavy').

From a diachronic perspective, some of the plural suffixes probably had a specific semantic connotation that was (in parts) correlated with nominal classification. However, analogical processes have considerably obscured the original classes that were perhaps marked for the

opposition [± animate] or [± human]. Today, we can describe three types of plural marking: a) basic, b) polymorph(em)ic, and c) collective. In the following sections, these three types are discussed in more details. Note that in case the loan nature of a term is relevant, only the immediate source (mainly Azeri) is given. (1) illustrates the set of plural markers documented for Udi:

(1)   Basic   Derived
       -ux ~ -ox ~ -xo   *-ur-ux ~ -ur-xo*
       -ur   *-m-ux*
       -r   *-x-ox*
                                      -q'-ox
                                      -r-x-ox
                                      -m-x-ox

Today, all plural morphemes are stress attracting. The suffix *-r* used with referentialized forms probably was stress neutral. Final *-x* normally undergoes voicing in inflected forms (see below). This process is coupled with the frequent loss of the preceding vowel *-u-* which regularly causes labialization of the subsequent vowel of the inflectional morpheme. The basic pattern is *-ux + V(C-) > -ġ-o(C-)*. Note that this pattern has already been rather stable in Caucasian Albanian. Nevertheless, the Caucasian Albanian paradigm of number marking seems to be marked for stronger semantic properties than it is the case in Modern Udi.

3.2 Monomorphemic plurals.

In Vartashen, monomorphemic plurals involve the two suffixes *-ux ~ -ox*, and *-ur ~ -r*. Today, *-ux* is the standard plural marker in Varstahen Udi. Its provenience is obscure. It is totally unknown in other Lezgian languages as well as in East Caucasian itself. Attempts to relate the suffix to the Svan plural marker *-χ* have failed. Instead, we should consider the possibility of relating the suffix to a local variant of the Armenian plural *-k^c* that would have undergone spirantization (the representation of final aspirated *-k^c* in Armenian loans by *-x* is incidentally documented for Udi). Yet, this assumption does not explain the preceding vowel that is alien to Armenian. Perhaps it is taken in analogy from the second basic plural marker *-ur* (see below).

More than a half of all Udi nouns used the suffix *-ux* to form their plural. Most of them are either polysyllabics or (secondary) monosyllabics (see below). Nouns ending in 'weak' *-a* often change this vowel to *-i* when the plural morpheme *-ux* is added (*k'aśa* 'finger > *k'aśiux* etc.). The plural suffix *-ux* is restricted to the dialects of Vartashen, Upper Nij, and Okt'omberi. The other variants of Nij use the variant *-xo ~ -ox*, which has a broader distribution than the standard plural *-ux*, see below. In order to illustrate the default suffix in Vartashen, some examples are given in (2) (Vartashen Udi):

(2)   *abazak'*   >   *abazak'ux*   'thief'
       adamar   >   *adamarux*   'man, person'
       älämät   >   *älämätux*   'sign'
       apči   >   *apčiux*   'liar'
       aq' ~ arx   >   *aq'ux ~ arxux*   'small pitch'
       arum   >   *arumux*   'wheat'
       aslan   >   *aslanux*   'lion'
       aˁil   >   *aˁilux*   'child'
       baba   >   *babaux*   'father'
       beˁġaˁl   >   *beˁġaˁlux*   'overseer'
       beˁinś   >   *beˁinśux (~ beˁinśurux)* 'priest'
       biq'al   >   *biq'alux*   'trapper'
       c'ic'ik'   >   *c'ic'ik'ux*   'chicken'
       čälibiq'al   >   *čälibiq'alux*   'fisherman'
       čoban   >   *čobanux*   'shepherd'
       dizik'   >   *dizik'ux*   'snake'

durut'	>	*durut'ux*	'wooden material'
eġel	>	*eġelux*	'sheep'
farišt'ä	>	*farišt'iux*	'angle'
günäh	>	*günähux*	'sin'
günähnut'	>	*günähnut'ux*	'correct person'
hampi	>	*hampiux*	'elder'
isp'at'ux	>	*isp'at'ux*	'testimony'
k'ok'oc'	>	*k'ok'oc'ux*	'hen'
meid	>	*meidux*	'body, corpse'
nana	>	*nanaux*	'mother'
oreʕin	>	*oreʕinux*	'spring, source'
p'uri	>	*p'uriux*	'dead person'
partal	>	*partalux*	'coat'
penec'	>	*penec'ux*	'plough'
pexambar	>	*pexambarux*	'prophet'
q'ačaġ	>	*q'ačaġux*	'robber'
q'ullugↄ̌-či	>	*q'ullugↄ̌-čiux*	'servant'
q'umq'um	>	*q'umq'umux*	'snail'
śu(ỉ)e	>	*śu(ỉ)ux*	'bear'
xinär	>	*xinärux*	'girl, daughter'
zira	>	*ziraux ~ ziriux*	'thyme'

Monosyllabic nouns that have the *-ux*-plural usually are reduced variants of older bisyllabic words, compare *aq'* 'small pitch' < Azeri *arık*, *dör* 'period of time' < **dövär*, *koi* 'sleeve' < **kolin*, *q'ač'* < *q'ač'i* 'what has been made narrow' > 'gorge' etc. Hence, it is reasonable to claim that *ux*-plurals are basically coupled with polysyllabic nouns. Note, however, that in Caucasian Albanian, this distributional pattern is less evident. Here, a small number of monosyllabic nouns add the *-ux*-plural, e.g. *il'* 'word' > *il'-owx*, *q'ar* 'tribe' (lit.: 'separated unit') > *q'ar-owx* etc.

The Nij variant *-xo ~ -ox* is more widespread than Vartashen *-ux*. In Nij, it sometimes occurs with nouns that show a complex plural in Vartashen, compare:

(3) *araba* > N. *arabaox* (V. *arabamux*) 'chariot'
  avans > N. *avansxo* (V. *avansmux*) 'attack'
  axt'a > N. *axt'aox* (V. *axt'amux*) 'castrated boar'
  azar > N. *azarxo* (V. *azarmux*) 'illness'
  amdar (N.) > *amdarxo* (V. *adamarux*) 'person'
  dällägxana > N. *dällägxanaox* (V. *dälägxanamux*) 'bath, hammam'
  dizik' N. *dizik'xo* (V. *dizik'urux*) 'snake'

The two Nij variants *-ox* and *-xo* are undoubtedly related to Vartashen *-ux*. Nevertheless, it is difficult to describe this relationship more exactly. First, the varying vocalization (*-u-* vs. *-o-*) cannot be explained by the impact of surrounding sounds (i.e., by assimilation). There is a small number of Udi terms that uses the *u/o*-opposition to form lexical contrasts, compare:

(3) *q'oʕ-ux* 'barks'
  q'oʕl-ox 'trousers' (pl. tantum, metonymic use of *q'oʕl* 'bark)
  gor(gor)-ux 'beanpoles'
  gor-ox 'poor, harmless, ill person' (pl. tantum, metaphoric < Caucasian Albanian *gorowx* 'sin(s)'
  k'od(a)-ux 'wooden shovels'
  k'od-ox 'temples' (pl. tantum, metonymic use of *k'oda* 'shovel')

In Vartashen, the *-o*-variants are most often met with collectives, see below. It thus seems reasonable to assume that the *-u/o*-opposition has once encoded some kind of yet obscured morphological contrast. On the other hand, it can also be claimed that the Nij plurals *-ox ~ -xo*

have resulted through analogy from the oblique cases that always show *-o-* in the vocalization of case suffixes, cf. the following excerpt of the case paradigm (*adamar/amdar* 'person'):

(4)

		Vartashen		Nij	
		SG	PL	SG	PL
	Absolutive	*adamar*	*adamar-ux*	*amdar*	*amda-xo*
	Ergative	*adamar-en*	*adamar-ġ-on < *-ux-en*	*amdar-en*	*amdar-xo-n*
	Genitive	*adamar-i*	*adamar-ġ-oy < *-ux-ay*	*amdar-i*	*amdar-x-o(y)*
	Dative	*adamar-a*	*adamar-ġ-o < *-ux-a*	*amdar-a*	*amdar-x-o*

The distribution of *-ox* vs. *-xo* in Nij is normally controlled by the stem auslaut: Polysyllabic V-final nouns take *-ox*, polysyllabic C-final nouns take *-xo*, compare:

(5)
araġač-xo	'broken twigs of mulberry tree'
älžäy-xo	'glove' (< *älžäk-*, compare Azeri *əlcək*)
baćʼan-xo	'backs'
beˤdul-xo	'shovels'
beˤinś-xo	'priests'
damp'ul-xo	'plums'
apči-ox	'liars'
araba-ox	'chariots' (Azeri *araba*)
ärmi-ox	'Armenians'
axt'a-ox	'castrated boars' (Azeri *axta*)
baćʼana-ox	'swallow'
baru(i)-ox	'walls' (Azeri *barı*)
därzi-ox	'cutters' (Azeri *dərzi*)
haburru-ox	'bashful, prudish person' (Azeri *abırlı*)
k'öi-ox	'big pots of clay' (Azeri *küp* ?)
mäzä-ox	'snack' (Azeri *məzə*)
q'uda-ox	'holy person' (Azeri *quda*)
zäli-ox	'leeches' (Azeri *zəli*)

Nevertheless, the above mentioned distribution is not fully observed in Nij. Especially in Upper Nij, C-final nouns tends to have *-ox* instead of expected *-xo*. Incidentally, both *-ox* and *-xo* show up in exactly the same surroundings, compare *q'armaġ* 'small hook' Azeri *qarmaq*) > *q'armaġ-ox* vs. *q'artmaġ* 'bark (of trees)' (Azeri *qartmaq*) > *q'artmaġ-xo*; *q'ačʼaġ* 'highwayman' (Azeri *qaçaq*) has both plurals (*q'ačʼaġ-ox ~ q'ačʼaġ-xo*).

Obviously, the *-ox*-plural represents the older form that parallels Vartashen *-ux* (~ *-ox* with pluralia tantum). In consequence, the variant *-xo* should be interpreted as resulting from metathesis of *-ox* after a final consonant. The reason for this process has perhaps been the tendency to preserve the syllabic structure of the nominal stem, compare *zi.zam.xo* (*zizam-xo*) 'livers, spleens' instead of Vartashen *zi.za.mur* (*zizam-ur*). Note that the suffix *-xo* normally blocks the expected sonorization of *-x-* (> *-ġ-*). In consequence, *xo*-plurals have a rather reduced paradigm (see above (4)).

The two monomorphemic plurals *-ur* (~ *-or*) and *-r* represent the older (Lezgian) layer of plural marking in Udi (proto-Lezgian *-Vr*). The suffix *-ur* (~ *-or*) can be both stress attracting and stress neutral (many speakers prefer stress attraction). Most probably, the *-Vr*-plural was restricted to human beings (or animates) in proto-Lezgian. However, Modern Udi has completely lost this semantic condition – just as it is true for most other Lezgian languages (except Rutul). The *-ur*-plural is illustrated in (6):

(6)
ayaq'	*-ur*, N. *-xo*	'glass'
-al	*-ur, -or*, N. *-xo*	Nomina agentis
alaf	*-ur*, N. *-xo*	'hey, grass'
arčan	*-ur*, N. *-xo*	'pine tree'

badak'	*-ur,* N. *-xo*	'wine jelly'
balanq'o(i)	*-ur, -ux,* N. *-xo*	'blackberry'
bazuk'	*-ur*	'elbow'
bedasil	*-ur,* N. *-xo*	'bastard' (Azeri *bədəsil*)
belek'oჳ	*-ur, -urux*	'shed'
beʕinś	*-ur,* N. *-xo*	'priest'
c'irik'	*-ur*	'chicken'
ča	*-ur,* N. *-ux*	'cord'
damp'ul	*-ur,* N. *-xo*	'plum'
elexe	*-ur, -urux*	'salty water'
ex	*-ur, -ux*	'field before harvest'
kalabul	*-ur,* N. *-xo*	'lazy person'
oʕq'	*-ur, -ux*	'river'
pop	*-ur, -urux*	'hair'
purik'	*-ur*	'blister'
q'oč	*-ur, -urux*	'male sheep' (Azeri *qoç*)
qur	*-ur*	'clod of earth' (Azeri *quru*)
sun	*-ur*	'elbow'
tagƛ̌	*-ur, -ux*	'twig, branch' (Azeri *tağ*)
xe(-n)	*-ur*	'water'
zikil	*-ur,* N. *-xo*	'wart' (Azeri *ziyil*)
zorba	*-ur, -or,* N. *-orox*	'powerful person'

The *-ur*-plural is often used with the *-ux*-plural to form a bimorphemic plural (*-urux ~ -orox,* see below). Its vowel is obviously influenced by the vocalization of the standard plural *-ux.* Normally, *-ur* is not used with V-final stems. In case the nominalizer *-o* is present, the plural morphemes looses its vowel (> *-r*). With referentialized forms, the default plural is *-r,* compare:

(7)   *ašbal-o-r*   'they who work'
        bi-o-r   'they who/which have (been) done'
        bu-o-r   'they who exist/live'
        me-n-o-r   'these' (proximal)
        vi-o-r   '(things) which are yours (sg.)'

Words that have undergone conversion to a nouns (especially *-al*-participles) take either the *-ux-* or the *-ur ~ -or*-plural: *čälibiq'al* 'fisherman' > *čälibiq'alux ~ čäli-biq'alor* 'fishermen', *zorba-ur* 'powerful men, rulers', *kala-o-r* 'the elder' etc.

The monophonematic *-(V)r*-plurals are normally confined to the absolutive case. In the oblique cases, the plural morpheme is replaced by the standard plural *-ux > -gƛ̌-*:

(8)   *kala-o-r*   'the elders'
        kala-t'-ġ-on   'the elders (REF:OBL-PL-ERG)'
        kala-t'-ġ-o(î)   'the elders (REF:OBL-PL-GEN)'
        kala-t'-ġ-o   'the elders (REF:OBL-PL-DAT)' etc.

With monosyllabic nouns, the *-ur*-plural is incidentally preserved in the oblique cases, but followed by the default morpheme *-gƛ̌-*:

(9)   *oʕq-ur*   'river-PL'
        oʕq-ur-ġ-on   'river-PL-PL-ERG'   etc.

3.3. Polymorphemic plurals.

Polymorphemic plurals are a well-known feature in many Lezgian languages. In Udi, there are two basic types: *-ur + -ux* and *-m + -ux.* The element *-m-* is the only segment that cannot be used alone. It always has to be followed by the standard morpheme *-ux.* Historically, the *-r-* and

the -*m*-plurals seem to have formed two distinct classes in Proto-Lezgian: Whereas *-*r*-plurals were confined to human or animate referents, *-*m*-plurals were used to encode inanimate plurals. It is tempting to relate this pattern to the paradigm of nominal class markers that are used mainly in attributive and verbal agreement ([15], [16]). The reconstructed pattern for these markers shows up as follows:

10)

		SG	PL
Human, male		*w*	*b*
Human, female + related objects		*y/r*	*b*
I			
Non-human, larger, more important		*b*	*d*
II			
Non-human, smaller, less important		*d*	*d*
V			

In order to derive the *-*r/m*-plurals from tis paradigm, we would have to posit an early, reduced variant comparable to that of actual Botlikh (an Avar-Andian language)::

(11)   Botlikh

	SG	PL	Plural of nouns
I	*w*	*r/l*	*-*r*
II	*y*	*r/l*	*-*r*
III	*b*	*b*	*-*m* < *-*b*

However, comparative evidence suggests that the Botlikh paradigm is a quite recent development that cannot be referred to from a proto-language perspective. Also note that noun classification in East Caucasian normally is 'covert', meaning that class markers do not occur with their triggers ([15]). It is more likely to assume that the old *-*r/m*-plurals have to be kept apart from the system of noun classification.

The original distribution of the *-*r/m*-plurals, however, has become obscure in Udi. The list for -*ur*-plurals given above already included a number of inanimate nouns. Also note that the Caucasian Albanian plural allomorph -*bowr* (e.g. *iše-bowr* 'joint-brethren', *e-bowr* 'these' etc.) that is complete lost in Modern Udi, links the two morphemes together (*-*b-ur*).

The rather small class of -*mux*-plurals is just as heterogeneous as the class of -*ur*-plurals. (12) lists some examples:

(12)

aġa	-*mux*, N. -*xo*	'lord' (Azeri *ağa*)
aġala	-*mux*, N. -*ox*	'rain' (~ Azeri *ağış*) [PL: 'periods of rain']
aiaz	-*mux*, N. -*xo*	'frost' (Azeri *ayaz*) [PL : 'periods of rost']
ayt	-*mux*, -*urux*, N. -*urux*	'word' (Azeri *ait*)
ayz	-*mux*, N. -*mux*	'village'
aˤil	-*mux*, -*ux*	'child' (Persian/Arabic ᶜ*ayyil*)
binä	-*mux*	'fundament, building' (Azeri *bina*)
dällägxana	-*mux*, -*ux*, N. -*xo*	'bath, hammam' (Azeri *dəlləgxana*)
ġar	-*mux*	'boy, son'
yoldaš	-*mux*	'friend' (Azeri *yoldaş*)
iśq'ar	-*mux*	'man'
kul	-*mux*	'hand'
k'aśa	-*(i)mux*, -*(i)ux*	'finger'
oćal	-*mux*	'earth'
pul	-*mux*	'eye'
tur	-*mux*	'leg, foot'
viči	-*mux*	'brother'

xoyd	*-mux, -ux*	'rice field'
xunči	*-mux*	'sister'

The list includes animates and inanimates, native words and borrowings. In fact, the use of *-mux* is not predictable (nevertheless, the high portion of body parts involved is remarkable). Occasionally, the segment *-m-* reflects rather a phonetic process than a semantically motivated structure: Nouns ending in *-i* or having a secondary *-i* that results from a 'weak' final *-a* often show both an *-i-ux* and an *-imux*-plural (e.g. *k'aśa* 'finger' > *k'aśiux ~ k'aśimux*). Thus we might think of a sonantic element used to separate the two vowels (> *-m-* before *-u-*).

The *-urux*-plural, however, has a clear distributional pattern: it is nearly always coupled with monosyllabic nouns (as opposed to *-ux*-plurals that are normally added to polysyllabic nouns). Examples for the dialect of Vartashen include: *ap'* 'sweat', *ar* 'pea' (Azeri *armud*), *aš* 'thing', *aˤl* 'partridge', *aˤm* 'arm', *aˤq* 'slope', *band* 'little door' (Persian *band*), *bar* 'part', *ber* 'pillow', *bič'* 'bastard' (Azeri *biç*), *bin* 'bride', *bot'* 'cut', *boˤq'* 'pig', *bul* 'head', *buš* 'camel' , *bəˤġ* 'middle', *č'aġ* 'spoke', *č'ap'* 'secret', *c'il* 'embers', *č'uġ* 'small water-beetle', *cac* 'thorn', *cil* 'seed' (Armenian *cil*), *ćo(i)* 'face', *ǯam* 'pot' (Azeri *cam*), *dib* 'tree nursery', *dost'* 'friend' (Azeri *dost*), *döv* 'ghost' (Azeri *dev*), *eˤk* 'horse', *eˤś* 'apple', *fi* 'wine', *fur* 'measles', *ġi* 'day', *ġoġ* 'Caucasian wingnut', *ġu(i)* 'hare', *gez* 'vegetable garden, patch', *gic'* 'line' (Armenian *gic*), *hand* 'field, steppe' (Persian *hand*), *yaq'* 'way', *yas* 'grief' (Azeri *yas*), *yäš* 'year' (Azeri *yaş*), *il* 'plant, grass, herbs', *k'äǯ* 'water pipe', *k'ač'* 'gorge, slope', *k'oǯ* 'house', *k'ul* 'earth, ground', *k'ur* 'rock', *ken* 'garlic', *kiz* 'felt' (Azeri *kiz*), *kos* 'large drum' (Azeri *qus*), *kul* 'hand', *kürk* 'fur' (Azeri *kürk*), *maˤq* 'oak', *mec* 'nest', *mom* 'wax' (Azeri *mom*), *mux* 'fingernail, claw', *muz* 'tongue, language', *mu□q', -ux* 'stag, red deer', *nal* 'horseshoe' (Persian *naˤl*), *naˤv* 'gutter' (Azeri *nov*), *ol* 'central post in a house', *ox* 'comb', *p'i* 'blood', *put* 'pound' (Azeri *pud*), *q'ać'* 'pain', *q'al, -ux* 'whether', *q'aˤnc* 'horn', *q'ov* 'wick', *q'oˤl* 'bark', *q'urt* 'mother hen' (Azeri *qırt*), *q'uš* 'bird' (Azeri *quş*), *qaz* 'goose' (Azeri *qaz*), *šan* 'ground', *šet'* 'bit', *šul* 'fox', *śum* 'bread', *t'ik'* 'wine pipe', *t'ol* 'skin', *t'ul* 'wine grape', *top* 'iron wheel' (Azeri *top*), *tos* 'footstool', *tul* 'young animal', *tut* 'mulberry', *uk'* 'heart', *ul* 'wulf', *us* 'bull', *uś* 'firewood', *uˤġ* 'loft, roof', *vaˤ* 'belief', *vel* 'goat', *xa* 'wool', *xač* 'cross', *xod* 'tree', *xup* 'pilaw', *zoq'* 'young shoot' (Azeri *zog□*), *zor* 'power', *žeˤ* 'stone', *źol* 'cork', *źuk'* 'spindle'.

Polysyllabic nouns that have an *-urux*-plural most often are compounds the second segment of which is a monosyllabic noun. Obviously, the *-urux*-plural came into use at a time when the compounds in question still were rather loose structures. The same is true for a number of loans from Azeri such as *q'arabaš* 'slave' < Azeri *qarabaş*, lit. 'black head' (*qara + baş*) and perhaps *araxis* 'peanut' < *ara-xis* (?). Analogically, the plural of reduplicated forms such as *k'aˤk'aˤp'(-urux)* 'knee(s)' is conditioned by the structure of the non-reduplicated root (**k'a□p*). However, note that some *-urux*-plurals remain obscure: For instance Udi *lek'er* 'dish, pot' borrowed from Greek *λεκάνη* 'bowl, dish' has an unexpected plural *lek'erurux* (~ *lek'erux*); *dizik'* 'snake' (of unknown origin) also has *dizik'-urux* rather than *dizik'ux* (but compare Nij *dizik'xo*).

Still, the restriction of *-urux*-plurals to monosyllabic nouns cannot be questioned. Diachronically speaking, we have to relate this distributional feature to the *-ur*-segment that is undoubtedly older than the *-urux*-plural. In other words: Monosyllabics originally formed their plural in *-ur*. This distributional pattern obviously merged with the semantic criteria mentioned above. The resulting polysyllabic structures such as **yaq'-ur* (*ya.q'ur*) 'ways' probably had a collective function that led to the reinterpretation of the *-ur*-marked forms as derived, bisyllabic nouns. These nouns then canonically received the default plural morpheme *-ux*. A restricted number of nouns (some of them denoting domesticated animals) still reflect this process, compare:

(13)		'hair'	'camel'	'man'	'horse'
	Singular	*pop*	*buš*	*iś(u)*	*eˤk*
	Collective Plural	*pop-ur*	*buš-ur*	*iś-ur*	*eˤk-ur*
	Distributive Plural	*pop-urux*	*buš-urux*	*iś-urux*	*eˤk-urux*

A restricted number of words have extended the collective function to the *-urux*-plural, among them: *a□murux* 'arms, shoulders', *zadurux* 'things, affairs', *e□s□urux* 'apples', *burux* < **bu-rux* 'mountain' (cf. Caucasian Albanian *bu* 'mountain').

The two polymorphemic structures *-mxox* and *-rxox* have a rather limited distribution. Obviously, we have to deal with older *-mux* and *-urux*-plurals that were additionally marked by the default plural *-ux ~ -ox* (*-m-ux-ox > -mxox,* *-(u)r-ux-ox > -rxox*). Examples are *ga* 'place' > *ga-mxox* 'places', *ġi* 'day' > *ġi-mxox* (~ *ġi-rxox*) 'days' (but note *ġi-r-ux* 'fasten days'), *c'i* 'name' > *c'i-rxox* 'names', *o* 'grass' > *o-rxox* 'grasses', *fi* 'wine' > *fi-rxox, me* 'knife' > *me-rxox* (~ *me-n-ur*) 'knifes', *źeˤ* 'stone' > *źeˤ-rxox* 'stones'. Perhaps, some of these forms reflect older C-final words that have undergone reanalysis of the final consonant. This is at least true for *fi* 'wine' < *fin-, me* 'knife' < *men-,* and *ġi* 'day' < *ġin-.* The final segment *-n* had then been changed to *-r-* before *-x-*. Old *-r* is probably preserved with *c'i-rxox* < *c'ir[-(u)x-ox]* < Proto-Lezgian *t:ʷər* 'name' and *źeˤrxox* 'stones' < *źeˤr-.* The plural of the noun *ga* is difficult to explain. The term undoubtedly stems from Persian *gāh* 'place' that, however, does not supply us with evidence for a final sonant. Nevertheless, a plural *ganmxox* is incidentally documented. On the one hand, this form illustrates that *ga* in fact could behave like *fi* 'wine', *ġi* 'day' etc. However, the additional presence of the segment *-m-* in *ganmxox* argues against the assumption that *-n-* is preserved in the plural *ga-mxox* < **gan-xox* (thus Evg. Jeiranišvili [8 :46]). Also, if *ga* stems from **gan-,* we should expect a plural ***garxox* rather than *ga-mxox,* see above.

3.4. Collectives.

Udi has a number of referential forms that represent petrified plurals encoding an (older) collective meaning. Today, some of these nouns have turned into pluralia tantum, others have preserved their collective meaning to a certain extent. The following list documents some of the nouns:

(14)	*arux*	'fire'	<	*c'ar-* 'flame, fire'
	bixox	'god(s)'	<	**bixo* 'creator'
	boˤxmoˤx	'nose'	<	**boˤx* 'nostril'
	burux	'mountain'	<	**bu* 'mountain' (Caucasian Albanian *bu* 'id.')
	čubux	'woman'	<	**čub/w,* compare Nij *čuġon* 'woman:PL:ERG'.
	c□omox	'face'	<	*ćo* 'side'
	elmux	'soul'	<	**hel* 'breath' (Caucasian Albanian *hel* 'soul')
	ġirux	'fasten day(s)'	<	*ġi* 'day'
	gorox	'poor man'	<	?
	imux~ imox	'ear(s)'	<	**i(b)* 'ear'
	k'odox	'sleeve(s)'	<	*k'oda* 'shovel'
	q'oˤlox	'trousers'	<	*q'oˤl* 'bark'
	ulux	'tooth/teeth'	<	**ul* 'tooth'
	źomox	'mouth, lips'	<	**źo ~ *źu* 'lip'

Pluralia tantum and collective nouns are normally marked by standard plural morphemes, both mono- and biphonematic. In the oblique cases, they behave like standard plurals (*čubġon* 'woman:ERG' etc.). Secondary plurals are formed with the help of the plural morpheme *-ox.* In the resulting group *...-u/ox-ox,* the first vowel is dropped: *imux* 'ear' > *imxox, burux* 'mountain' > *burxox, čubux* 'woman' > *čubxox, ulux* 'tooth' > *ulxox* etc. Note that *čubux* 'woman' sometimes is used with a plural *čupq'ox* < *čubq'ox.* The origin of the segment *-q'o-,* however, is obscure (most likely, it is also present in the Vartashen 3PL clitic *-q'un*). In the oblique cases, the second *-x* is voiced just as with standard plurals (*čubxoġon* 'women.ERG' etc.).

A restricted number of nouns show a segment *-ar* already referred to already above. It is possible that we have to deal with another type of pluralia tantum related to the plural marker *-Vr* (> *-ur*). However, we cannot always identify the assumed basic noun stem, both from a formal and a semantic point of view. (15) lists those nouns in *-ar* that most probably belong to this class:

(15)	*adamar*	'man, person'	<	**adam* 'man, person'
	axar	'freezed meat'	<	**ax-(?)*
	civar	'rain'	<	**ci-v-* 'down' (?)
	ġar	'boy, son'	<	?

iśq'ar	'man'	<	*is□(u)* + *-q'□-* 'man' (?)
maq'ar	'who brings the bride'	<	* *maq'* (?) [or loan?]
mašar	'saw'	<	**maš-* (?) [or loan?]
nišq'ar	'sacrifice'	<	**niš-* + *-q'□-* (?)
ništ'ar	'razor'	<	**ništ'-* (?)
xinär	'girl, daughter'	<	**xin-* 'younger female being')

4. Results

The brief overview on plural formation in Udi illustrates that historically, Udi has started from a paradigm that has its matches in other (South-) East Caucasian languages. This concerns the two elements *-r* and *-m* the second of which has become petrified in Udi. The *-r*-plural has survived as an independent marker especially in the system of demonstrative pronouns and nomina agentis derived from nominalized verbal participles. The Proto-Lezgian pattern that related **-r* to human beings and **-m* to non-humans, however, got lost in Early Udi. Instead, *-r*-plurals tended to form derived nouns (collectives) from monosyllabic nouns the plural of which was later reinforced by the new Udi plural marker *-ux* (> *-urux*). The same holds for older plurals in *-m* (> *-mux*). The origin of the new plural *-ux*, however, remains unclear. The fact that it is already present in Caucasian Albanian suggests that it has developed as an innovation after the ancestor of Caucasian Albanian/Early Udi has separated from the Eastern Samur proto-language. One possible candidate as a donor language would have been a local variety of Old Armenian in case *-ux* can be explained as a fricative version of the Old Armenian plural marker *-kᶜ*.

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УДК 81

Образование множественного числа в удинском языке

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Аннотация. Восточно-кавказские языки типичны гетерогенной системой номинального обозначения множественного числа. Характеризуется массивным алломорфом, который основан, по крайней мере частично, на исторической семантической категоризации соответствующих существительных. Существуют также фонотактические критерии отбора множественных алломорф. В статье эти аспекты илюстрированы, классифицированы и проанализированы с исторической точки зрения на примере двух восточно-кавказских языков (удинского и его раннехристианского предшественника кавказско-албанского языка).

Ключевые слова: восточно-кавказские языки; морфология; образование множественного числа; алломорфы.

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Semantic Representatives of the Concept "Happiness"

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Abstract. In the article concept as one of the principle notions of cognitive linguistics is investigated. Considering concept as culture phenomenon, having language realization and ethnocultural peculiarities, the description of the concept "happiness" is presented. Lexical and semantic paradigm of the concept of happiness correlates with a great number of lexical and semantic variants. In the work semantic representatives of the concept of happiness, covering supreme spiritual values are revealed and semantic interpretation of their functioning in the Biblical discourse is given.

Keywords: language; concept; happiness; blessedness; beatitude; semantic representative; biblical discourse; language world view; national consciousness.

Introduction. The study of the concept in modern linguistics is of paramount importance. However, any attempt to comprehend the nature of the concept is associated with a number of the most diverse points of view. The intensive research of it in the field of cognitive linguistics has demonstrated a great disparity in the understanding of the term "concept". In linguistics, the concept, in contrast to a word, has a more complicated structure.

The concept "happiness" is of great interest for study since it has acquired a big range of shades of meanings owing to different worldviews of peoples as the result of their historical development. Language notion about happiness is as a whole psychological and mainly oriented towards emotional and sensitive perception of "formula of happiness". In this work we investigate lexica-semantic variants of the concept "happiness" correlating with the meaning of happiness as a subjective condition, resulting in moral agents, not from the possession of something, as commonly supposed, but from the free, full, unimpeled use of the powers in unselfish service.

Materials and Methods. The research was made on the materials of the Bible text, scientific works and articles of the scholars. Methods. Scientific methods of linguistic description, generalization and systematization of logical and semantic analysis, comparative analysis have been used in the work.

Discussion. Language picture of the world is the most important component of the conceptual picture of the world, which is "mediated by language signs or even wider by knowledge of the language, its units and the rules and, what is most important by content of language forms" [1]. The totality of ideas of people fixed in the language units at a certain stage of development of people is reflected in the signs of language and their meanings [2]. Nowadays the results of the research of language pictures of the world are being described by such linguists as Harman G., Taylor J.R., Lakoff G., Tomlin R.S. Language picture of the world is conceptual for it is formed only by verbal means determining the formation and development of the conceptual picture of the world. Therefore, a detailed analysis of the content of the concept and its semantic representatives becomes a step towards the modeling of conceptual pictures of the world.

The meaning of "concept" is explored in cognitive science, metaphysics, and philosophy of mind. The term "concept" is traced back to Aristotle's definition of terms in his work "The classical theory of concepts" [3]. The study of the concept in modern linguistics is associated with a number of the most diverse points of view.

As the purpose of this article is to reveal and analyze meaningful and cultural content of semantic representatives of the concept "happiness", presented in the biblical discourse, we shall start with scientific approaches to the notion of 'concept'.

The concept is a "multivariate idealized forming" [4], but there is no consensus as to the number of semantic parameters according to which the study can be conducted: it includes conceptual and imaginative, value, behavioral, etymological and cultural "dimensions" [5]. In general the concept can be represented as a set of associations, links among the objects and phenomena, based on a personal, subjective experience, and the experience of lingvocultural community as a whole.

According to the definition, proposed by M. Piminova, the concept is an idea of a fragment of the world, or a part of the fragment having a complex structure, expressed by different groups of features, realized by different linguistic ways and means. The concept reflects categorical and value characteristics of knowledge of some fragments of the world. The whole description of the concept, which is significant for a definite culture, is possible if all representatives of the concept are investigated [6]. This definition successfully combines linguistic and cultural and linguistic significance of the concept.

Not less important for our study is the assertion of S. Neretina that concepts in general are not universal and spiritual entities that can provide a link between the multi-ordinal ideas of the world: the divine and the human. They are marked by extreme heartful stress, oriented to understanding of the meaning of faith, virtue, love; these are the elements of the spiritual culture of a person, created by him to understand himself and his place in the world. In addition to love and faith, here are death and immortality, good and evil, truth and falsehood, dignity, honor, conscience, beauty, happiness, etc. [7].

Therefore, for a complete semantic description of linguocultural content of the concept, namely the concept of happiness, it is important to study conceptual, figurative and meaningful constituents in its composition and semantic representatives.

A lot of words are said about happiness, a lot of pages are covered with writing. Every generation has its own "recipe" for happiness. Despite the fact that happiness has been studied and described by philosophers, thinkers and writers the phenomenon of happiness has not been solved.

In 306 BC, on the outskirts of Athens, itinerant philosopher Epicurus bought a garden. Over its gate, he placed a sign: "Dear guest, you will be happy here! Here the pleasure is the great blessing". In such way the right was formulated at the first time, which was later included in all political slogans - "The human right to happiness," being understood as a synonym for pleasure in everything [8]. For a more exact wording let us have a look at the lexicographical sources.

In the S.I. Ozhegov's explanatory dictionary happiness is explained as success, fortune, a sense and a state of complete and higher satisfaction. The Oxford English Dictionary records the definition of happiness as pleasure, satisfaction, fortune, happy coincidence, a fluke. Analysis of the synonyms of the concept of "happiness" emphasizes the following concepts: bliss, beatitude, aptness, felicity, joy, contentment, well-being, prosperity, blessings, victory, success and peace [9; 10]. In question of this article, we revealed semantic representatives of happiness – *beatitude, bliss and blessedness*. The words are mostly used in religious and poetic discourse.

Discourse is a coherent text, taken in conjunction with extra linguistic conditions and situational communication with pragmatic, socio-cultural and other factors. Religious discourse is a kind of strictly fixed institutional discourse, containing the key concept of faith as a trusting union with God, based on the rule of law, concretized in the commandments [11]. The best known source of religious commandments is the Bible. The Bible, as the object of study is of interest to scientists for a long time. Being closely related to the European Christian culture, the Bible has a great cultural significance [12]. For many centuries the Bible remains one of the most significant religious sources, influencing the formation of worldview of major part of world's population [13].

Evangelical idea of bliss goes back to Socratic-Platonic felicitous conception reproduced in the teachings of the Stoics, who argued that the only and the most reliable source of happiness is virtue: in virtute jure posita est vera felicitas (in virtue is true happiness) [14]. In the Christian doctrine the place of virtue is taken by the righteousness as a steady adherence to the divine laws and the "commandments of the Lord", leading the believers into a state of higher spiritual satisfaction and unceasing joy. In Orthodoxy, "Blessedness" is thought as good deeds and so abstaining from unrighteous deeds [15].

The commandments of the Sermon on the Mount are very different from the Ten Commandments of Moses in the Old Testament, because each commandment of Moses is a strict ban: do not kill, do not steal, do not covet your neighbor's wife, do not misuse the name of the Lord your God, etc. The Old Testament Jew was protected by these laws-bans from the all sides.

Jesus Christ's teaching means not ban, but impulse to activity, not threat of punishment, but promise of bliss, while human ethics, which still pretended to be normal, seems to be turned inside out. Unless someone comes to his mind that happy (and in the Gospel, Blessed) is not the one who is rich, but the one who is poor, not the one who is laughing, but the one who cries. According to the teachings of the Gospel, it is so. Moreover, the very joy and happiness are treated not as a reward and retribution, but as a natural state of man with a pure heart, and doing good deeds. Fulfilling the commandments, this very difficult and tearful work is the reward and bliss for the Christian, so blessed is the poor, those who mourn and persecuted.

Nine "beatitudes" are proclaimed by Jesus in the Sermon on the Mount in the Gospel of Matthew: Blessed are the poor in spirit, for theirs is the kingdom of heaven; Blessed are those who mourn, for they will be comforted; Blessed are the meek, for they will inherit the earth; Blessed are those who hunger and thirst for righteousness, for they will be filled; Blessed are the merciful, for they will be shown mercy; Blessed are the pure in heart, for they will see God; Blessed are the peacemakers, for they will be called sons of God; Blessed are those who are persecuted because of righteousness, for there is the kingdom of heaven; Blessed are you when people insult you, persecute you and falsely say all kinds of evil against you because of me (Matthew 5, 3-11) [16, 1652].

Jesus began his sermon (called Sermon on the Mount) with words that seem to contradict each other. But God's way of living usually contradicts the world's one. If a person is willing to live for God he must be ready to say and do what seems strange to the world. He must be willing to give when others take, to love when others hate, to help when others abuse. By giving up his own rights in order to serve others, a person will one day receive everything God has in store for people. These beatitudes are not multiple choices – pick what you like and leave the rest. They must be taken as a whole. They describe what people should be like as Christ's followers.

Beatitude tells how to be blessed. "Blessed" means more than happiness. It implies the fortunate or enviable state of those who are in God's kingdom. The Beatitudes don't promise laughter, pleasure, or earthly prosperity. To Jesus, "blessed" means the experience of hope and joy, independent of outward circumstances. To find hope and joy, the deepest form of happiness, follow Jesus no matter what the cost. Jesus says that God's kingdom is organized differently from worldly kingdoms. In the kingdom of heaven, wealth and power and authority are unimportant [17].

The concept of "blessedness" in modern language is not unambiguous meaning. In English the figurative meaning of the concept of «bliss, blessed, beatitude» is silly. In the Russian language other meanings of the adjective "blessed" relate solely to its meaning and are implemented either in a religious discourse – "God's fool, revered as a saint" [18], "a person living an ascetic, a righteous way of life and who has, in the opinion of religious people, the gift of prophecy" [19], "the voluntary beggar wanderer, taking the form of a person deprived of sound mind, and which, by the notion of believers, is the gift of prophecy" [20] – or a spoken language – "silly, eccentric", "stupid, silly" [21].

Lexicographical sources do not record any restrictions on the use of the adjective "blessed" to mean "happy, merry". Nevertheless, the analysis of the adjective functioning in the literary language is the evidence of impossibility to use the statements of the first person to describe the subject: "I am blessed ..." Whereas in the English language can be found the following sentence in the passive voice «I'm blessed / I was blessed», but in the sense of "I am fortunate", "I'm happy".

Thus bliss is the highest degree of happiness, joy, whereas happiness is a feeling of ecstatic satisfaction if the goal is achieved. Blessedness for the true believer is the truth revealed by Christ: do not seek happiness for yourself, search it for others, and then it will find you itself. After all, real happiness does not depend on external conditions; the main condition as well as the principal obstacle for being happy is the man himself.

The results of the analysis of semantic representatives of the concept "happiness" let us conclude that beatitude, bliss and blessedness represent the spiritual component of the universal concept, sending to experiencing perfect happiness, spiritual joy. Happiness for an average man and blessedness for a believer have different connotations, despite they are synonyms. If happiness

is literal understanding of achieving the goal, success, moral satisfaction and possession of material goods, then blessedness, being its spiritual analogue, implies a feeling of being highly favored, especially by the Supreme Being. Bliss and beatitude function as intensives of subjective constituent of happiness.

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Семантические репрезентанты концепта «счастье»

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Аннотация. В статье исследуется одно из центральных понятий когнитивной лингвистики – концепт. На основе представления концепта, как явления культуры, имеющее языковое выражение и отмеченное этнокультурной спецификой, представлено описание концепта «счастье». Лексико-семантическая парадигма концепта счастья соотносится с большим количеством лексико-семантических вариантов. В работе выявлены семантические репрезентанты концепта счастья, покрывающие высшие духовные ценности, дана семантическая интерпретация их реализации в библейском дискурсе.

Ключевые слова: концепт; счастье; блаженство; духовное счастье; семантический репрезентант; библейский дискурс; языковая картина мира; национальное сознание.

Cultural Studies

Культурология

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Western Audiovisual Stereotypes of Russian Image: the Ideological Confrontation Epoch (1946-1991)

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Abstract. This article included the analysis of the Western audiovisual stereotypes of Russian image from the period of ideological confrontation (1946-1991): ideological and social trends, classification of the contents' models and genres. The content analysis of the western media texts of the period of the "cold war" (1946-1991) allows to present their main plot diagrams as follows: Soviet spies penetrate into the territory of the USA/Western country to commit diversion and/or to worm out military secrets; the USSR prepares a covert attack on the territory of the USA/Western world, creating secret bases with nuclear weapons; the inhuman Soviet totalitarian regime oppresses its own people or the people of any other country; Nonconformity leaves/attempts to leave the USSR where, in their opinion, democracy and individual freedom are being oppressed; common western people explain to Soviet military/civilian visitors who were mislead by propaganda that the USA/Western country is the stronghold of friendship and world-wide prosperity and peace; obstacles connected with the ideological confrontation between the USSR and the Western world appear on the way of a loving couple.

Keywords: cold war; Western films; screen; image of Russia; USA; ideological confrontation; media studies; film studies; spy; enemy.

Introduction. Political, ideological, historical, socio-cultural aspects of the *Cold War* era have often become research issues (Pechatnov, 2006; Rukovishnikov, 2000; The Cold War…, 2003; Keen, 1986; LaFeber, 1990; Levering, 1982, et al.). As for the Russian image interpretation on the West-European screen, judging by some works of Russian and foreign scholars (Vlasov, et al., 1997; Ginzburg, Zak, Yurenev, et al, 1975; Groshev, Ginzburg, Lebedev, Dolinsky, et al., 1969; Turovskaya, 1993; 1996; 2003; Fomin, 1996; Yurenev, 1997; Douglas, 2001; Hess, 2003, Shaw and Youngblood, 2010 and others), one can draw a conclusion that the problem of the Russian image transformation in the western cinematograph from the *Cold War* era (1946-1991) to the contemporary period (1992-2010) still remains insufficiently studied.

Western scholars have published quite a few books and articles about the *enemy image* (i.e. Russia) during the *Cold War* era. For instance, American scholars M. Strada and H. Troper (Strada, and Troper, 1997) T. Shaw and D.J. Youngblood (Shaw and Youngblood, 2010) analyzed a number of American and Soviet movies on the Cold War topic in their monographs and arrived at a valid conclusion that a *chameleon-like* presentation of Russians in the Hollywood cinema had often changed its color – now red now pink-red, sometimes white or blue depending on the foreign policy changes (Strada, Troper, 1997, p. 200). But, firstly, these authors did not set before themselves the aim to give a comparative analysis of the Soviet and post-Soviet Russian screen images, and, secondly, they analyzed exclusively American and Soviet media texts and did not study western films in general.

Cinema (due to TV shows, videos and DVDs) is considered an effective means of media influence (including political and ideological influence) on the audience. Consequently, the study of the Russian image transformation on the western screen is still up-to-date. One of the objectives of this research is to define the place and role of the Russian image transformation topic in the western cinematograph from 1946 (the beginning of the post-war ideological confrontation) to 1991

(the Soviet Union disintegration) versus the tendencies of the modern age (1992-2010); the study of the political, ideological, social and cultural contexts, the principal development stages, concepts, aims, objectives, authors' conceptions of this topic interpretation on the western screen; classification and comparative analysis of the ideology, content models, genre modifications, western cinematograph stereotypes connected with the Russian image interpretation.

The research methodology is based on key philosophical propositions concerning the communication, interdependence and integrity of phenomena/facts, the unity of historical and social aspects in cognition, the dialogue of cultures theory by M. Bakhtin and V. Bibler. My work relies on research content approach (study of the process content with the whole complex of its elements, their interactions and character, reference to facts, analysis and synthesis of theoretical findings, etc.), on historical approach – study of concrete historical development of the claimed topic in the western cinematograph. For this purpose I use both theoretical research methods (classification, comparison, analogy, induction and deduction, abstraction and concretization, theoretical analysis and synthesis, generalization) and empirical research methods (data acquisition connected with the research subject matter). The efficiency of such methods has been proved by western (R. Taylor, T. Shaw, D.J. Youngblood, A. Loughton, et al.) as well as Russian scholars (N. Zorkaya, E. Ivanyan, M. Turovskaya, A. Chubaryan, et al.).

It is well-known that the interpretation of media texts is changeable and subject to variations of political policies. After the peak of the ideological confrontation of the late Stalinism era and the peak of McCarthyism (1946-1953) when screen *enemy images* were full of mutual malicious grotesque, the Thaw period of the mid 1950s – the early 1960s turned the situation of the ideological confrontation in media production in the direction of a more verisimilar representation of a *potential enemy.* Both western and Russian scholars frequently noted that there were always enough excuses for ideological and media confrontation (Jones, 1972; Keen, 1986; LaFeber, 1990; Levering, 1982; Shlapentokh, 1993; Small, 1980; Strada, 1989; Strada and Troper, 1997; Whitfield, 1991; Ivanyan, 2007; Klimontovich, 1990; Kovalov, 2003; Turovskaya, 2003). But each of the opposing sides preferred to choose the most advantageous facts (in their favor) passing over *black spots* in silence.

That explains the violent storm of angry accusations of bourgeois cinema vices as well as the western world in general which raged in Soviet scientific and journalistic literature devoted to the problem of the *ideological struggle on the screen* (see, for example, Ashin, Midler, 1986, p. 83; Baskakov, 1981, pp. 16-17; Kokarev, 1987, pp. 5-6; Komov, 1982, p. 13; Kukarkin, 1985, p. 377). At the same time, "propagandists possessed all the necessary premises and conditions for the creation of the information reality suitable for the USSR administration: experience, state monopoly on mass media and information itself, citizens' confidence in the government and newspaper messages, a low level of political culture and literacy of some part of the population, traditional distrust of the West" (Fateyev, 1999).

It is true that one could often run across single-valued passages in the works of more liberal Soviet film critics (Dolmatovskaya, 1976, pp. 221-223; Kapralov, 1984, p. 379; Kartseva, 1987, pp. 199-201; Sobolev, 1975, p. 18) meant for Soviet viewers who had never seen anti-Soviet films, and who had never attempted to reach the level of comparative analysis of media stereotypes *on both sides of the Iron Curtain.*

However, the evolution of western film texts interpretations by Soviet and Russian critics is a subject for further research. In this book we are interested mainly in the image of Russians seen through the western *film view.*

Films' Stereotypes of the Ideological Confrontation Epoch (1946-1991)

The comparative analysis of plots, characters and ideology of the western and Soviet films of the ideological confrontation epoch (1946-1991) shows a substantial similarity of their media stereotypes.

The content analysis of *Cold War* media texts allows to present their main plots as follows:

- spies penetrate into some USSR/USA/Western country to sabotage and/or to find out some military secrets (*Secret Mission, The Blue Arrow, The Mystery of Two Oceans, Above the Tissa, The Shadow Near the Pier, The Case of Corporal Kotchetkov, A Shot in the Fog, Marked Atom, The Prize, 13 Frightened Girls, We Accuse, From Russia with Love, Topaz, A Dandy in Aspic, Le Serpent, The Spy Who Came in from the Cold, Firefox, Invasion U.S.A., Le caviar rouge, The Fourth Protocol, No Way Out, etc.*);

- the opponent plots a secret attack against some USSR/USA/Western country creating secret bases with nuclear weapons for this purpose (*The Mystery of Two Oceans, World War III, Secret Weapons, Rocket Attack U.S.A., etc.*). Another variant: occupation troops invasion (*Black Seagull, Red Dawn, Amerika, etc.*), opponents exchange nuclear strikes which destroy the USA or even the whole planet (*Five, On the Beach, Chosen Survivors, Threads, Fail-Safe, The Day After*, etc.);

- a brutal pseudo-democratic or totalitarian regime oppresses its own people (USSR/USA/other country) quite often performing risky medical experiments or throwing its people into concentration camps (*The Plot of the Doomed, Silver Dust, The First Circle, One Day in the Life of Ivan Denisovich, 1984, Gulag, Mosca addio, Moscow on the Hudson, The Interviewer*, etc.);

- dissidents abandon/try to abandon a country where, in their opinion, democracy and personal freedom are stifled (*The Iron Curtain, Red Danube, The Journey, Escape to the Sun, Green Card, The Lost, La Diagonale du fou, Moscow on the Hudson, Flight 222, White Nights, etc.*);

- ordinary Soviet/western citizens explain to Soviet/western military/civil visitors misled by propaganda that the USSR/USA/Western country is a bulwark of friendship, prosperity and peace (*Ninotchka, Silk Stockings, Russian Souvenir, Leon Garros is Looking for his Friend, The Russian are Coming, Russkies, etc.*)

- a loving couple meets some obstacles connected with the ideological confrontation between the USSR and the Western world (*Silk Stockings, The Iron Petticoat, Queen of Revenge or to Leave Forever, One Two Three, Before Winter Comes, The Golden Moment, Cowboy and the Ballerina, etc.*);

I agree with M. Strada and H. Troper: the last prominent peak of the *Cold War* cinema fell on the early 1980s when the Russian as part of a monolithic and aggressive system were portrayed as products of their environment – malevolent, strong, and actively revolutionary all over the world. In the early 1980s love and marriage practically disappeared from American films about Russia, as well as religion. Almost all Russian characters were shown as definite agents of violence: they were men who abhorred and usually endangered the American way of life. In this message there was an incessant crystal-clear demand from advocates of freedom to remain vigilant in relation to the malevolent Soviet system and its sinister representatives (Strada, Troper, 1997, p. 170).

However, a detailed analysis of Soviet/Russian films about America and the West is not our research objective, therefore we will focus on studying stereotypes **within the ideological confrontation topic presented in western feature films of different genres.**

The Stereotype Structure of Western 'Confrontational' Dramas

Historical period, scene: *any interval of time from 1917 to 1991, the USSR, the USA, other countries.*

Setting, household objects: *simple dwellings and household utensils of Soviet characters, luxurious dwellings and household stuff of western characters.*

Representation of reality: *quasirealistic or conventional and grotesque depicting of people's life in 'hostile countries'.*

The western example of representation of events: *New York, a modern attractive megalopolis, a cosy and comfortable, democratic and dynamical melting pot of nationalities and cultures. And on the other side of the ocean is Moscow, - a dark, gloomy city with long queues outside the shops and military patrols on the streets.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *positive characters are advocates of democratic ideas; negative characters are exponents of anti-humane, militarist ideas. Characters differ not only in the social but also in the material status. Soviet characters are quite often demonstrated as rude and cruel zealots with a primitive vocabulary and ever frowning faces, active gesticulation and disagreeable voices.*

Significant change in the characters' life: *negative characters prepare to implement their anti-humane ideas.*

Incipient problem: *the lives of positive characters as well as lives of the whole nationalities/countries are in danger.*

Search for solutions to the problem: *a struggle of positive characters with negative ones.*

Problem solution: *murder/arrest of negative characters, returning to a peaceful life.*

The Beast of Budapest. USA. Director H. Jones.

Historical period, scene: *Hungary, October, 1956.*

Setting, household objects: *dilapidated streets and buildings of Budapest, torture-chambers of Hungarian communist special services; poor households of simple Hungarians, luxurious interiors of the Budapest police chief's department.*

Representation of reality: *quasirealistic, making some semblance to documentary objectivity by including some fragments of original newsreel facts of 1956.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *Hungarian rebels and special services workers of the Hungarian communist regime. The latter are shown as rude, cruel and cynical sadists with a primitive vocabulary, unpleasant voices and looks; Hungarian rebels, on the contrary, are depicted as extremely positive characters; they are purposeful, strong, honest fighters for peace and democracy who use a business lexicon, restrained manners and mime; even those of them who at first tried to maintain neutrality or even were under the influence of the communist propaganda, soon find their bearings and join the rebels.*

Significant change in the characters' life: *Hungarian communists together with the Soviet troops try to crush the riot of Hungarian workers and students and to arrest/kill their leaders.*

Incipient problem: *the lives of positive characters – Hungarian rebels, are under threat.*

Search for solutions to the problem: *the leaders of Hungarian rebels go into action against communist special services.*

Problem solution: *the positive characters slay the Budapest police chief in the fight who wanted to flee to Austria for fear of people's wrath (though in the end the offscreen voice reports that, unfortunately, the victory of democratic forces proved to be temporary and soon the Soviet troops managed to restore a communist regime in Hungary)*

Sakharov. Great Britain, 1985. Director J. Gold.

Historical period, scene: *the USSR of the middle of the 1980s.*

Setting, household objects: *poor Soviet conditions of life, squalid surroundings.*

Representation of reality: *quasirealistic, making some semblance to documentary objectivity, elements of obvious grotesque.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *an outstanding scientist-democrat and crafty KGB agents. They differ in their ideology. Academician Sakharov is charming, clever, honest, plainly dressed, has a correct literary speech, his mime and gestures suit the canons of the intellectual. The KGB agents are deceitful, cynical, obsessed with the ideas of repressing democracy and freethinking... Their lexicon is primitive, their gestures and mime are vulgar.*

Significant change in the characters' life: *KGB initiates surveillance of the outstanding scientist-democrat, and then he is exiled from Moscow into a bleak and dirty provincial town, off-limits to foreigners.*

Incipient problem: *the life of the outstanding scientist and his family is in danger.*

Search for solutions to the problem: *a democratic western society supports the scientist-democrat.*

Problem solution: *inspired by the Western world support the scientist believes in the near win of democratic forces.*

The Hunt for Red October. USA, 1990. Director G. McTiernan.

Historical period, scene: *at the turn of the 1990s, in the ocean.*

Setting, household objects: *office compartments and cabins of a submarine.*

Representation of reality: *realistic, making some semblance to documentary objectivity.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *the commander of the Soviet submarine 'Red October' and their American colleagues. At first they differed in the ideological status. The commander is charming, clever, honest, dressed in the military uniform, his speech (English, of course) is correct, his mime and gestures suit the canons of a military seaman. His American colleagues are also dressed in the military form, they are efficient professionals.*

Significant change in the characters' life: American military men want to win the Soviet commander to their side.

Incipient problem: hesitation of the Soviet submarine commander between the military oath and a temptation to hand over the newest submarine to the American colleagues.

Search for solutions to the problem: the commander of the submarine tries to analyze the situation.

Problem solution: the triumph of democratic forces, the commander of the Soviet submarine joins the American Fleet.

The Stereotype Structure of Western 'Confrontational' Thrillers or Detectives

Historical period, scene: any interval of time from 1917 to 1991, the USSR, the USA, other countries.

Setting, household objects: simple dwellings and household utensils of Soviet characters, luxurious dwellings and household stuff of western characters (but being on the territory of the hostile country the spies adapt to housing and living conditions of the adversary).

Representation of reality: as a rule, conventional and grotesque representation of the lives of people in 'hostile states'.

Characters, their values, clothing, constitution, lexicon, mime, gestures: positive characters (frontier guards, counterintelligence agents, spies, saboteurs, and peaceful citizens) and negative ones (the same groups, except for peaceful citizens). Split by ideology and world outlook (bourgeois and communist), as a rule, the characters are strong-built and look according to the plot of a media text: spies can for some time (before the exposure, for example) look nice, but then they will necessarily show their vile essence... Other Soviet characters (frontier guards, KGB chiefs, etc.) are shown as rude and cruel zealots with a primitive lexicon, ever frowning faces, active gesticulation and disagreeable tones of heart-rending cries...

Significant change in the characters' life: negative characters commit a crime (illegal crossing the border, acts of sabotage, espionage, blackmail, theft of government secrets, murders).

Incipient problem: law-breaking.

Search for solutions to the problem: crime investigation, pursuit of negative characters.

Problem solution: positive characters expose/catch/kill negative characters.

Embassy. The USA, 1972. Director G. Hessler.

Historical period, scene: an Arabian country of the early 1970s. The American embassy.

Setting, household objects: streets of the Arabian capital, the embassy interiors.

Representation of reality: neutral and correct representation of positive American characters; a slight grotesque in relation to the Soviet spy (though, at first his portrait is neutral), the settings and interiors look quite realistic.

Characters, their values, clothing, constitution, lexicon, mime, gestures: the negative character is a Soviet spy; positive characters are a dissident who ran away from the USSR and the American embassy staff. All the characters are dressed nearly in the same way – according to the diplomatic status. All of them are restrained. It is clear that the Soviet spy is forced to conceal his adherence to 'the values of the socialist way of life'.

Significant change in the characters' life: the Soviet spy penetrates into the American embassy.

Incipient problem: the Soviet spy tries to kill the dissident from the USSR who asked the American ambassador for a political asylum.

Search for solutions to the problem: positive Americans try to expose the Soviet spy.

Problem solution: the Soviet spy is exposed.

Telefon. The USA, 1977. Director D. Siegel.

Historical period, scene: the USA of the late 1970s.

Setting, household objects: American streets, offices of American special services.

Representation of reality: neutral and positive American characters; a slight grotesque in relation to the Soviet spy; the settings and interiors look quite realistic.

Characters, their values, clothing, constitution, lexicon, mime, gestures: a negative character – Soviet spy Dalchinsky; positive characters – Soviet agent Borzov (here one can feel the obvious détente impact on Hollywood scripts that never dared to endow Soviet spies

with positive traits before); by the way, a similar method was used earlier in the Soviet cinema too, in the film 'Resident's Mistake' shot in 1968; an American spy is also shown there in a positive way) and employees of American intelligence department. All the characters are dressed almost likewise – they are wearing smart clothes. They are reserved in showing their feelings and thoughts.

Significant change in the characters' life: *Soviet spy Dalchinsky makes up his mind to implement an old plan of the Soviet espionage; using a codeword on the phone he orders the Kremlin agents who were hypnotized in the 1940s to blast out USA military facilities.*

Incipient problem: *the USA security is in danger (though the majority of the damaged militarily facilities turn out to be out-dated).*

Search for solutions to the problem: *the Kremlin sends the best agent Borzov in the USA to upset Dalchinsky's plans.*

Problem solution: *Borzov neutralizes Dalchinsky and prevents a further serial of explosions. After the successfully completed operation Borzov (apparently, being fascinated by the American way of life and beautiful Barbara) resolves to remain in the USA for good. Here the reasons for the initially positive image of Borzov become clear even to the least sagacious audience...*

No Way Out. USA, 1987. Director: R. Donaldson.

Historical period, scene: *the USA of the mid-eighties of the XXth century.*

Setting, household objects: *offices of special services, apartments.*

Representation of reality: *the living conditions and all the characters are displayed quite realistically, without grotesque.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *a negative character – a Soviet spy (charismatic, attractive, purposeful, clever, well-dressed); positive characters – Americans, including - employees of the American special services. The Soviet spy skillfully conceals his genuine purposes and goals under the mask of a charming American for the greater part of the action.*

Significant change in the characters' life: *the Soviet spy gets some information about the American special services affairs.*

Incipient problem: *the Soviet spy attempts to undermine the USA defensive capability.*

Search for solutions to the problem: *positive Americans attempt to expose the Soviet spy.*

Problem solution: *the Soviet spy is exposed.*

The Stereotype Structure of Western 'Confrontational' Action Films

Historical period, scene: *any interval of time from 1917 to 1991, the USSR, the USA, other countries.*

Setting, household objects: *simple dwellings and household utensils of Soviet characters, luxurious dwellings and household stuff of western characters (if the latter are in the West, of course, not on the territory of Russia), typified patterns of military facilities bases, cabins of planes and tanks, decks of naval vessels, compartments of submarines.*

Representation of reality: *as a rule, conventional and grotesque representation of the lives of people in 'hostile states'.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *positive characters (servicemen of different armed forces and peaceful citizens) - advocates of democratic ideas; aggressors (military men, saboteurs, terrorists) – bearers of anti-humane ideas. Split by ideology and world outlook (bourgeois and communist), as a rule, the characters are strong-built and look according to the plot of a media text: Soviet characters (soldiers, officers) are shown as rude and cruel zealots in Western films with a primitive vocabulary, ever frowning faces, active gesticulation and disagreeable tones of heart-rending cries...*

Significant change in the characters' life: *negative characters commit a crime (military aggression, acts of sabotage, murders).*

Incipient problem: *transgression - the lives of positive characters, and very often, the lives of all peaceful characters of a democratic country (in this or that meaning) are under threat.*

Search for solutions to the problem: *armed struggle of the positive characters with the enemy aggression.*

Problem solution: *killing/capture of aggressors, return to peaceful life.*

Firefox. USA, 1982. Director C. Eastwood.

Historical period, scene: the Moscow and Moscow suburbs of the early 1980s.

Setting, household objects: Moscow streets, apartments, a military aerodrome situated near Moscow, a jet fighter cabin; ascetic conditions of the Soviet life.

Representation of reality: the Soviet life attributes, interiors, costumes and so forth are shown with grotesque. Moscow looks like a dark, dirty, unfriendly city, with military patrols in the streets and in the underground.

Characters, their values, clothing, constitution, lexicon, mime, gestures: a positive character – a courageous and dexterous American pilot, he is also a valorous spy and a patriot of America; negative characters – his Soviet enemies, dull-witted and disagreeable; common Moscow passers-by are shown as people with gloomy faces dressed in similar grey-brown clothes. The vocabulary of all the characters is plain. The mime and gestures are often exaggerated.

Significant change in the characters' life: having stolen a march on the armed guard the American pilot skulks to the Soviet military aerodrome.

Incipient problem: the American pilot hijacks a secret Soviet jet Firefox and successfully takes off.

Search for solutions to the problem: Soviet military men try to shoot down the plane, and the American pilot tries to escape.

Problem solution: the American pilot successfully lands at a western military aerodrome.

Born American. USA, 1985. Director R.Harlin.

Historical period, scene: the Finland and the USSR of mid 1980s, frontier areas.

Setting, household objects: streets and houses in Finland and the USSR, KGB torture-chambers. Poor Soviet living conditions.

Representation of reality: the Soviet life attributes, interiors, costumes and so forth are shown with grotesque, and the Finnish ones are shown in a positive and advertising manner.

Characters, their values, clothing, constitution, lexicon, mime, gestures: positive characters are common nice American guys; negative characters are Soviet agents of KGB. The latter look like caricatures – with hysterical mime and gestures, a primitive vocabulary. The Soviet characters are dressed in plain grey clothes.

Significant change in the characters' life: having deceived the Soviet frontier guards the American guy illegally crosses the Finnish-Soviet border just for fun.

Incipient problem: the American guy falls into clutches of cruel KGB agents.

Search for solutions to the problem: the American guy tries to crash out.

Problem solution: the American guy manages to return to the West.

Rambo III. USA, 1988. Director P. MacDonald.

Historical period, scene: the Afghanistan occupied by the Soviet army of the late 1980s, mountain regions.

Setting, household objects: military bases, military accessories (the uniform, arms, etc.).

Representation of reality: the Soviet life attributes, interiors, costumes and so on look like rather realistic but some conventional elements characteristic of fighting and firing scenes of this genre are quite obvious.

Characters, their values, clothing, constitution, lexicon, mime, gestures: a positive courageous and invincible American warrior, and negative Soviet aggressors (shown in a grotesque manner). The characters' vocabulary is simple and connected to army specificity. The characters' mime and gestures are often exaggerated. The majority of the characters are dressed in a military uniform. Their physical development is apparently above the average.

Significant change in the characters' life: the American superman arrives in Afghanistan occupied by Soviet troops.

Incipient problem: the American guy's life as well as the lives of common Afghan people is under threat.

Search for solutions to the problem: the valorous American warrior defends the democracy and freedom of Afghan people.

Problem solution: the victory of the American superman over the Soviet aggressors.

The Stereotype Structure of Western 'Confrontational' Melodramas

Historical period, scene: *any interval of time from 1917 to 1991, the USSR, the USA, other countries.*

Setting, household objects: *simple dwellings and household utensils of Soviet characters, luxurious dwellings and household stuff of western characters.*

Representation of reality: *as a rule, a conventional and grotesque representation of people' life in 'hostile states'.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *male and female characters of a contrasting ideological and social status. Characters, as a rule, are of a shapely constitution and look rather nice. Their clothes, vocabulary and mime are of average quality.*

Significant change in the characters' life: *meeting of the male and female characters.*

Incipient problem: *ideological and social mésalliance.*

Search for solutions to the problem: *the characters overcome ideological and social obstacles to their love.*

Problem solution: *wedding / love harmony (in most cases); death, separation of characters (as an exception from the rule).*

Jet Pilot. USA, 1957. Director: J. von Sternberg.

Historical period, scene: *the USA (Alaska) and the USSR of the 1950s.*

Setting, household objects: *a jet cabin, apartments, military offices.*

Representation of reality: *emphasized favorable methods of treating positive characters and grotesque when treating negative characters.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *an American colonel and a young lady, – a Soviet jet pilot. They are of a different ideological, social and material status. The characters are usually dressed in the military uniform. They both are well-built. They speech is plain. The mime and gestures are emotional.*

Significant change in the characters' life: *a Soviet jet lands in Alaska. Its pilot is a charming Russian beauty who gets fascinated by America; the American colonel falls in love with her at first sight, they get married...*

Incipient problem: *soon after their wedding it turns out that the charming Russian spouse of the American colonel is a spy.*

Search for solutions to the problem: *the American starts to play his own game – he (as a counterspy) comes together with his wife to the USSR.*

Problem solution: *in the USSR the American colonel realizes that his Russian wife really loves him. The reunited couple steals Soviet aviation secrets and flies back to Alaska, having stolen the newest Russian jet fighter...*

Anastasia. USA, 1956. Director A. Litvak.

Historical period, scene: *the Europe of the 1920s.*

Setting, household objects: *the apartments of the Romanovs who are emigrants in Europe; urban streets.*

Representation of reality: *emphasized favorable methods of treating positive characters – the members of the Romanov family, as a whole a positive representation of heroine I. Bergman who gives herself out for Anastasia - the Russian emperor's (Nickolas II) daughter who escaped from being shot.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *the Romanovs who managed to escape are hereditary aristocrats with exquisite manners and imposter Anastasia. They belong to different social strata. Their clothes are in line with their social status – the members of the Romanov family are dressed elegantly. Anastasia (esp. at first) is dressed in plain clothes. The characters' vocabulary is in accord with their social status. The mime is often exaggerated and gestures are emotional.*

Significant change in the characters' life: *Paris, 1928. The members of the Russian tsar's family (who are in emigration) know that in July, 1918 Tsar Nickolas the Second, his wife Alexandra and their children were shot by Bolsheviks. However, all of a sudden, in a Western Europe country there shows up a young woman who calls herself the daughter of the Russian tsar – Anastasia.*

Incipient problem: *the appearance of the imposter makes some members of the Russian tsar's family and their servants preys to doubts: is the charming stranger genuine princess Anastasia?*

Search for solutions to the problem: *Anastasia's strange fragmentary reminiscences about the Romanovs' life which could be known only to a narrow circle of the tsar's family seem rather verisimilar... The members of the Romanov family try to look into the imposter's odd story...*

Problem solution: *at first Empress Maria Fedorovna accuses Anastasia of fraud but on hearing Anastasia's recollections known to them alone recognizes her as Nickolas the Second's daughter. And though journalists dig up true facts Maria Fedorovna gives Anastasia her blessing to marry a former Russian general...*

The Golden Moment. An Olympic Love Story. USA, 1980. Director R. Sarafian.

Historical period, scene: *the USA and USSR of mid 1980s.*

Setting, household objects: *urban streets, apartments, hotel rooms, gyms. An ascetic mode of Soviet life.*

Representation of reality: *conventional (within the genre), the whole American environment and major American characters are shown with sympathy.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *a charming American athlete and a nice Soviet gymnast; they are of a contrasting ideological, social and material status. The characters prefer sportswear. Both of them are well-built. The characters' vocabulary is plain. The mime and gestures are those of common people.*

Significant change in the characters' life: *the meeting of these characters during the Olympic Games of 1980 in Moscow, their mutual love.*

Incipient problem: *the lovers face a number of hindrances.*

Search for solutions to the problem: *the Soviet gymnast and the American athlete try to overcome the obstacles to their love.*

Problem solution: *when choosing between her sports career in the USSR and love, the Soviet gymnast prefers love...*

The Stereotype Structure of Western 'Confrontational' Love Comedies

Historical period, scene: *any interval of time from 1917 to 1991, the USSR, the USA, other countries.*

Setting, household objects: *simple dwellings and household utensils of Soviet characters, luxurious dwellings and household stuff of western characters.*

Representation of reality: *as a rule, a conventional/grotesque representation of people's life in 'hostile states'.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *male and female characters of a contrasting ideological and social status. The clothes of western characters look brighter and better than those of Soviet characters. The constitution, vocabulary, mime and gestures are differentiated but in whole the main characters (who according to the plot are destined to fall in love) have a pleasant appearance.*

Significant change in the characters' life: *the principal characters fall in love under amusing/eccentric circumstances.*

Incipient problem: *ideological and social mésalliance.*

Search for solutions to the problem: *the characters overcome ideological and social obstacles to their love in a number of amusing/eccentric situations.*

Problem solution: *a wedding / love harmony tinged with humor.*

The Iron Petticoat. USA, 1957. Director R. Thomas.

Historical period, scene: *the London of the late 1950s.*

Setting, household objects: *comfortable houses and household articles of Englishmen.*

Representation of reality: *conventional (within the genre); London and characters are shown with evident sympathy. In relation to the heroine – Kovalenko – the methods of representation change in the course of the plot: from grotesque (in her original, Soviet status), to sympathy (her final acceptance of 'western values').*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *Kovalenko, a shapely beautiful woman and KGB captain (in the beginning she is ascetic and possessed by communist ideas and ethics, but in the end she yields to the temptations of the*

western life and is dressed in the extreme of the fashion) and an elegant, charming British captain of counterintelligence. At first, the heroine's vocabulary abounds in Soviet official words and stock phrases, her mime and gestures are frostily officious. At the end of the film the heroine undergoes serious changes – coherent plain English replaces the former officialese, her mime and gestures get also humanized.

Significant change in the characters' life: *having arrived in London on the errand of the communist regime Kovalenko gets acquainted with a British captain.*

Incipient problem: *the difference in their ideological and social status obstructs the romance between the characters which is tinged with clowning, satire and humour.*

Search for solutions to the problem: *love becomes a means of overcoming the obstacles, and the principal obstacle being their mutual desire to convince each other of advantages of the communist or the Western world.*

Problem solution: *the solution of the Soviet beauty in love to reside in London, her happy alliance with the British officer.*

Silk Stockings. USA, 1957. Director R. Mamulian.

Ninotchka. USA, 1960. Director T. Donovan.

(Both the films are remakes of the well-known comedy *Ninotchka* (1939) directed by E. Lubitsch).

Historical period, scene: *the Paris and Moscow of the late 1950s.*

Setting, household objects: *luxurious dwellings and household stuff of Parisians, a poor official style of Moscow state offices.*

Representation of reality: *conventional (within the genre) but the French mode of life is shown with sympathy and the Soviet living conditions are caricatured. However, in relation to the principal heroine – Ninotchka – the means of image presentation undergo changes in the course of the plot: from a caricature (in her original, fanatical-Soviet status) to admiration (her final acceptance of 'western values').*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *nice Soviet functionary Ninotchka (initially, she is modest and obsessed by communist ideas and the party ethics, but at the end of the film she yields to the temptations of the western life and is very fashionably dressed) and a rich, elegantly dressed Parisian. The vocabulary of the heroine is rich in official clichés, her mime and gestures are reservedly officious. At the end of the film everything changes as if by magic - the heroine speaks the language of Parisian parlours, her mime and gestures meet the genre conception of 'a woman of the world'.*

Significant change in the characters' life: *having arrived in Paris on the errand of the communist regime Ninotchka gets acquainted with a charming Parisian.*

Incipient problem: *the difference in their ideological and social status obstructs the romance between the characters which is tinged with clowning, satire and humor.*

Search for solutions to the problem: *love and seduction become means of overcoming the obstacles, and the principal obstacle being Ninotchka's initial fanatical adherence to the communist ideology and her active aversion to the 'bourgeois morality'.*

Problem solution: *Ninotchka's renunciation of her former communist ideals and her happy alliance with the Parisian.*

One, Two, Three. USA, 1963. Director B. Wilder.

Historical period, scene: *the Berlin divided into occupation zones of the early 1960s.*

Setting, household objects: *comfortable dwellings, offices and articles of modern life of western Germanys and Americans living in Western Berlin. An ascetic mode of life of East Berlin Germanys.*

Representation of reality: *conventional (within the genre); the mode of life and characters of West Berlin are shown with evident sympathy. In relation to one of major characters – a guy from East Berlin – the means of image presentation undergo changes in the course of the plot: from grotesque (in his initial DDR status) to sympathy (his final acceptance of 'western values'). The characters belonging to the 'socialism world' (agents of DDR special services, Soviet military men) are shown in the manner of an openly slapdash caricature.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *a penniless guy from East Berlin obsessed by communist ideas and a girl, - a spoilt daughter of an American millionaire, head of "Coca-Cola" Corporation. The guy is simply and poorly dressed.*

The millionaire's daughter is dressed in expensive clothes; her vocabulary fits the Hollywood stereotype of a 'silly blonde'. The East Berlin guy's vocabulary abounds in socialist clichés at first, his mime and gestures are openly exaggerated. At the end of the film everything changes – the main character's speech becomes quite normal and plain.

Significant change in the characters' life: *the guy from East Berlin and the girl who arrived from America meet in Berlin divided into the west and Soviet zones; they fall in love with each other.*

Incipient problem: *the difference in their social and financial status and the DDR guy's ultra-communist views obstruct the romance between the characters which is tinged with clowning, satire and humor (the arrest of the guy by the East Berlin police; an unexpected visit of the girl's parents who think that their daughter is going to marry a Germany aristocrat; the guy's initial fanatical adherence to the communist ideology and his active rejection of the 'bourgeois mode of life').*

Search for solutions to the problem: *with the help of the smart director of the Berlin branch of "Coca-Cola" Co. the guy and the girl gradually overcome the obstacles they meet in their way.*

Problem solution: *the guy's renunciation of communist ideals and his happy marriage with the American millionaire's daughter.*

The Stereotype Structure of Western 'Confrontational' Comedies about Ideological Propaganda

Historical period, scene: *any interval of time from 1917 to 1991, the USSR, the USA, other countries.*

Setting, household objects: *simple dwellings and household utensils of Soviet characters, luxurious dwellings and household stuff of western characters.*

Representation of reality: *as a rule, a conventional/grotesque representation of people's life in 'hostile states'.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *Soviet and western characters of a contrasting ideological and social status. They look according to the aim of the media text sources: Soviet characters (if they do not make plans to defect to the West) are shown as rude and cruel zealots with a primitive vocabulary, ever frowning faces, active gesticulation and disagreeable voices...*

Significant change in the characters' life: *characters meet under funny/eccentric conditions, and either western or Soviet characters are on a foreign territory.*

Incipient problem: *'cultural shock', a communication gap.*

Search for solutions to the problem: *characters overcome ideological barriers hindering their communication in a number of humorous/eccentric situations.*

Problem solution: *harmony of mutual understanding between Soviet and western characters tinged by humor.*

The Russian Are Coming, The Russian Are Coming! USA, 1966. Director N. Jewison.

Historical period, scene: *the coastal area of the USA of the mid-1960s.*

Setting, household objects: *a Soviet submarine, a beach, a small American town, interiors of comfortable American houses.*

Representation of reality: *conventional (within the genre); the American mode of life and American characters are shown with sympathy. The Soviet characters are caricatured but it is a well-meant rather than a malicious caricature.*

Characters, their values, clothing, constitution, lexicon, mime, gestures: *nice plain Americans and a Soviet submarine crew; they are of a contrasting ideological, social and material status. The American characters are patriotic, charming, polite, precautionary, ready to help the Soviet seamen unaccustomed to the comfortable American mode of life; they are well dressed, their speech is plain, their mime and gestures depend on a situation (in the beginning the Americans are apparently scared suspecting that the Russian plan to attack the USA). The Soviet seamen are dressed in the military form, often and actively gesticulate, they are emotionally unstable.*

Significant change in the characters' life: *an account of the submarine malfunction which struck aground on a whim of the imbecile captain the Soviet seamen find themselves on the USA coastal territory. So their funny/eccentric adventures begin…*

Incipient problem: *(at first) not knowing anything about the USA democratic traditions, economy and culture the Soviet seamen receive a 'cultural shock' contemplating the achievements of the 'American lifestyle', and common Americans, in their turn, slowly part with their former stereotypic notions of Russians as furious enemies*

Search for solutions to the problem: *the Soviet and American characters overcome the barriers hindering their mutual understanding in a number of humorous/eccentric situations.*

Problem solution: *harmony of mutual understanding between the Soviet and American characters tinged by humor.*

Moscow on the Hudson. USA, 1985. Director P. Mazursky.

Historical period, scene: *the Moscow and New York of the mid-1980s.*

Setting, household objects: *Moscow and New York streets, shops, flats. Poor living conditions in the USSR. Comfortable living conditions in America.*

Representation of reality: *conventional (within the genre); the American mode of life and American characters are shown with sympathy. The Soviet lifestyle, on the contrary, is shown from the most negative point of view (dark streets, queues for toilet paper, petrol shortage, etc.)*

Characters, their values, clothing, constitution, lexicon, mime, and gestures: *Soviet citizens and common Americans, they are of a different ideological, social and material status. The main Soviet character (performed by R. Williams) who wished to immigrate to America is originally shown with sympathy and compassion. The rest of the Soviet characters are caricatured, especially the KGB agent played by S. Kramarov. This character is marked by hysteroid mime and gestures, foul language, but even he finally makes up his mind to stay and live in America. The clothing and food of the Soviet characters are scarce that is why they all admire the American supermarket supplies. It is curious that the film contains Russian speech (though it is given in the form of a distorted accent) what was a rare thing in western films of that time.*

Significant change in the characters' life: *during a tour of the USA a Soviet citizen decides to ask for a political asylum and so his funny/eccentric adventures begin…*

Incipient problem: *the newly-made emigrant who is used to difficult living conditions in Russia gets a 'cultural shock' in the American 'affluent society'.*

Search for solutions to the problem: *the ex-Soviet character copes with the obstacles preventing him from understanding the western values and the American mode of life.*

Problem solution: *the ex-Soviet character gets accustomed to his new environment and finds harmony living in the USA.*

Twist again `a Moscou. France, 1986. Director J.ean-Marie Poire.

Historical period, scene: *the Moscow of the mid-1980s.*

Setting, household objects: *official interiors of Moscow houses and hotels. An ascetic mode of Soviet life.*

Representation of reality: *conventional (within the genre); Frenchmen are portrayed with sympathy, the Soviet characters are shown in the manner of an openly slapdash caricature.*

Characters, their values, clothing, constitution, lexicon, mime, and gestures: *Frenchmen are dressed in the latest Paris fashions; the Soviet characters are shabbily dressed, their vocabulary is poor, mime and gestures are exaggerated.*

Significant change in the characters' life: *Frenchmen come to Moscow and find themselves in a whirlpool of comical events…*

Incipient problem: *the French and Soviet characters are of a different ideological, social and material status; the Frenchmen get a 'cultural shock' after meeting with the Moscow mode of life of that time.*

Search for solutions to the problem: *by getting accustomed to the Soviet mode of life and its bureaucratic obstacles the Frenchmen try to overcome the difficulties in their way.*

Problem solution: *the negative Soviet characters get punished.*

The Stereotype Structure of Western 'Confrontational' Sci-Fi Films

Historical period, scene: far/near future. The USSR, the USA, other countries, outer space.

Setting, household objects: simple dwellings and living conditions of Soviet characters, the interiors of space crafts, luxurious dwellings and excellent living conditions of western characters; a variation – cities and buildings destroyed by a nuclear catastrophe, poor life of the few survived characters.

Representation of reality: a quasirealistic or futuristic representation of events 'in one's own countries, spaceships', a conventional and grotesque representation of life in 'hostile countries and spaceships'.

Characters, their values, clothing, constitution, lexicon, mime, and gestures: positive characters (astronauts, military men, peaceful citizens) – bearers of democratic ideas, aggressors (astronauts, military men, saboteurs, terrorists) – carriers of anti-humane ideas. Clothing: the uniform of astronauts, the military uniform, ordinary civilian attire. Constitution: athletic and robust. Vocabulary – businesslike, the mime and gestures are in accordance with the current functions.

Significant change in the characters' life: negative characters commit a crime (military aggression, acts of sabotage, murders).

Incipient problem: transgression – the lives of positive characters and, quite often, the lives of all peaceful characters of a democratic country (in this or that meaning) are under threat. A variation: there are a few survivors after a nuclear catastrophe.

Search for solutions to the problem: armed struggle of positive characters with the enemy aggression, or an attempt of survivors after atomic bomb explosions to adapt to new living conditions.

Problem solution: killing/capture of aggressors, return to peaceful life, or the survivors' adaptation after the nuclear attack to new severe conditions of life.

Five. USA, 1951. Director A. Oboler.

Historical period, scene: near future.

Setting, household objects: streets and flats of an American city, ruins.

Representation of reality: a quasirealistic or futuristic representation of events.

Characters, their values, clothing, constitution, lexicon, mime, and gestures: average Americans. Their clothes, speech, mime and gestures are rather commonplace.

Significant change in the characters' life: enemies drop nuclear bombs on the USA territory...

Incipient problem: lives of ordinary Americans as well as the existence of the USA are threatened, only five people survive.

Search for solutions to the problem: the five Americans who cheated death unite in order to adapt to new living conditions.

Problem solution: the five Americans find the strength to begin a new life in the post-nuclear epoch despite all the difficulties...

Amerika. USA, 1987. Director D. Wrye.

Historical period, scene: near future, 1997. Alaska.

Setting, household objects: streets and houses of Americans, their comfortable living conditions (before the Soviet troops invasion).

Representation of reality: crude grotesque on the verge of a caricature.

Characters, their values, clothing, constitution, lexicon, mime, and gestures: positive Americans (nice, strong, courageous, fair, patriotic, true to their soldier's and civil duty) and negative Soviet aggressors (perfidious, cruel, unpleasant-looking, possessed by aggressive ideas). The characters' speech is simple and connected to the army specific character. The Soviet characters are wearing a military uniform.

Significant change in the characters' life: the Soviet Union treacherously attacks America by landing troops in Alaska...

Incipient problem: lives of simple Americans as well as the existence of the USA are threatened.

Search for solutions to the problem: Americans get united for a struggle against the Soviet aggressors.

Problem solution: a victory of democratic American forces over the Soviet aggressors.

Red Dawn. USA, 1984. Director J. Milius.

Historical period, scene: near future. Florida, USA.

Setting, household objects: streets and houses of Americans, comfortable living conditions (before the Soviet troops invasion).

Representation of reality: crude grotesque on the verge of a caricature.

Characters, their values, clothing, constitution, lexicon, mime, and gestures: positive American teenagers (nice, strong, courageous, fair, patriotic) and negative Soviet and Cuban aggressors (perfidious, cruel, unpleasant-looking, possessed by aggressive ideas). The characters' vocabulary is simple and connected with teenage and military language. The Soviet and Cuban characters are wearing a military uniform.

Significant change in the characters' life: the Soviet Union allied with communist Cuba treacherously attacks America by landing troops in Florida...

Incipient problem: lives of simple Americans as well as the existence of the USA are threatened.

Search for solutions to the problem: Americans get united for a struggle against the Soviet-Cuban aggressors.

Problem solution: a victory of democratic American forces over the Soviet-Cuban aggressors.

Conclusions. The analysis of transformation of the image of Russia on the Western screen, from the period of ideological confrontation (1946-1991), which includes ideological, social analysis, the analysis of stereotypes, the analysis of the characters, identification, iconographical, plot analysis, representational analysis, classification of the models of the contents and modifications of genres allow us to draw the following conclusions:

- anti-sovietism/anticommunism of the Western screen played an important role during the cold war, however we shouldn't forget that at all times the policy of the West was in many respects anti-Russian, and any strengthening of Russia (economical, military, geopolitical) was perceived as a threat to the Western world. This tendency can be traced in many Western works of art even before the rise of USSR as well as after its collapse;

- the content analysis of the western media texts of the period of the "cold war" (1946-1991) allows to present their main plot diagrams as follows: Soviet spies penetrate into the territory of the USA/Western country to commit diversion and/or to worm out military secrets; the USSR prepares a covert attack on the territory of the USA/Western world, creating secret bases with nuclear weapons; the inhuman Soviet totalitarian regime oppresses its own people or the people of any other country; Nonconformity leaves/attempts to leave the USSR where, in their opinion, democracy and individual freedom are being oppressed; common western people explain to Soviet military/civilian visitors who were mislead by propaganda that the USA/Western country is the stronghold of friendship and world-wide prosperity and peace; obstacles connected with the ideological confrontation between the USSR and the Western world appear on the way of a loving couple.

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УДК 008

Западные аудиовизуальных стереотипы образа России: эпоха идеологической конфронтации (1946–1991 гг.)

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Аннотация. Статья посвящена анализу западных аудиовизуальных стереотипов образа России в период идеологического противостояния (1946-1991): прослеживаются идеологические и социальные тенденции, дается классификация содержания и жанровых моделей западных медиатекстов/фильмов периода «холодной войны» (1946-1991), что позволяет представить их основные сюжетные схемы следующим образом: советские шпионы проникают на территорию США / Западной страны, чтобы совершить диверсии и/ или выведать военные тайны; СССР готовит нападение на США / западную страну, создавая секретные базы с ядерным оружием; бесчеловечный советский тоталитарный режим угнетает свой собственный народ или народ любой другой страны; попытки диссидентов покинуть СССР, где, по их мнению, нет свободы и демократии; западные граждане объясняют советским военным/обычным жителям СССР, которые были введены в заблуждение пропагандой, что США / Западная страна – оплот дружбы, процветания и мира; на пути влюбленной пары возникают препятствия, связанные с идеологической конфронтацией между СССР и западным миром.

Ключевые слова: холодная война; западные фильмы; экран; образ России; США; идеологическое противостояние; медиа; кинематография; шпион; враг.

Geosciences

Науки о земле

UDC 55

The Impact of Hurricane Katrina on the United States Tourism Industry

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Abstract. The goal of this paper is to present hurricane Katrina in all its stages, from the beginning to the end and to highlight the economic, environmental and social consequences that occurred in the hurricane aftermath with a focus on the tourism industry. This paper also briefly explains the basic mechanism of tropical cyclones and hurricanes and their occurrences through a detailed explanation of hurricane Katrina and its effects on the United States. Some attention is also given to the immense damage and aftermath which is the largest ever made by any hurricane.

Keywords: Katrina; hurricanes; United States; tourism.

1. Introduction

Katrina is the name of the hurricane which hit the southern coast of the United States in late August 2005. The hurricane originally appeared on the 24th of August, 2005, near the Bahamas with its first attack on mainland occurring near Miami (Florida) with a category 1 hurricane strength according to the Sapphire - Simpson's scale for hurricanes (Table 1). This event brought about major flooding and 11 deaths. Katrina continued its journey through the Gulf of Mexico where it became even more powerful and on the 29th of August, the hurricane hit the states of Louisiana and Mississippi with the intensity of a category 4 hurricane with wind speeds of over 250 km/h. Consequently, great damage was made to coastal areas, and 80% of New Orleans was flooded when the barriers that have been protecting the town were destroyed the day after. The hurricane also brought about a lot of damage and victims in the states of Alabama, Tennessee,

Georgia and Kentucky. It is estimated that it was the most expensive natural disaster in the United States until then [1, 2].

Such an enormous natural disaster more often manifests itself as an ecological crisis with increasing proportions for which the government has no solution to offer. Therefore, a new ecological ethics is emerging – ecocentrism, which is the opposite to anthropocentrism which considers the ecosystem to be a primary basis of everything, in which man is equal with other forms of nature. The only thing which differentiates him is his responsibility for life in general, especially for the human society, but also for inanimate nature. The problems of the modern world, technical and technological development accelerated by economic growth, urbanization and industrialization, population growth, depletion of natural resources and their impact on the disturbance of the ecological balance, introduction to the opinions of scientists and international forums about environmental problems and the global character of ecological problems present regular issues that scientists and experts at local, regional and global levels have to face on a daily basis [3].

The goal of this paper is to present hurricane Katrina in all its stages, from the beginning to the end and to highlight the economic, environmental and social consequences that occurred in the hurricane aftermath with the main focus on the tourism industry.

This paper also briefly explains the basic mechanism of tropical cyclones and hurricanes and their occurrences through a detailed explanation of hurricane Katrina and its effects on the United States. Some attention is also given to the immense damage and aftermath which is the largest ever made by any hurricane.

2. Climatology of tropical cyclones

The term "tropical cyclone" in its broader sense includes a number of tropical disturbances. The classification is made according to the maximum attained strength of the wind:
  • **Tropical disturbances**, when the maximum wind speed is less than 20 kt
  • **Tropical depressions**, where the maximum wind speed is between 20 kt and 34 kt,
  • **Tropical storms** when the maximum wind speed ranges from 35 kt to 64 kt and
  • **Hurricanes**, when the recorded maximum wind speed is more than 64 kt.

For this occasion, the most powerful tropical disorders with cyclonic circulation will generally be referred to as hurricanes as they are usually called in the areas of North and Central America and West India. Besides this, they have other names. For example, in the area of East Asia they are called typhoons, while residents of the Philippines call them bajagos, and in the Indian Ocean near Mauritius they are called Mauritius-hurricanes [4].
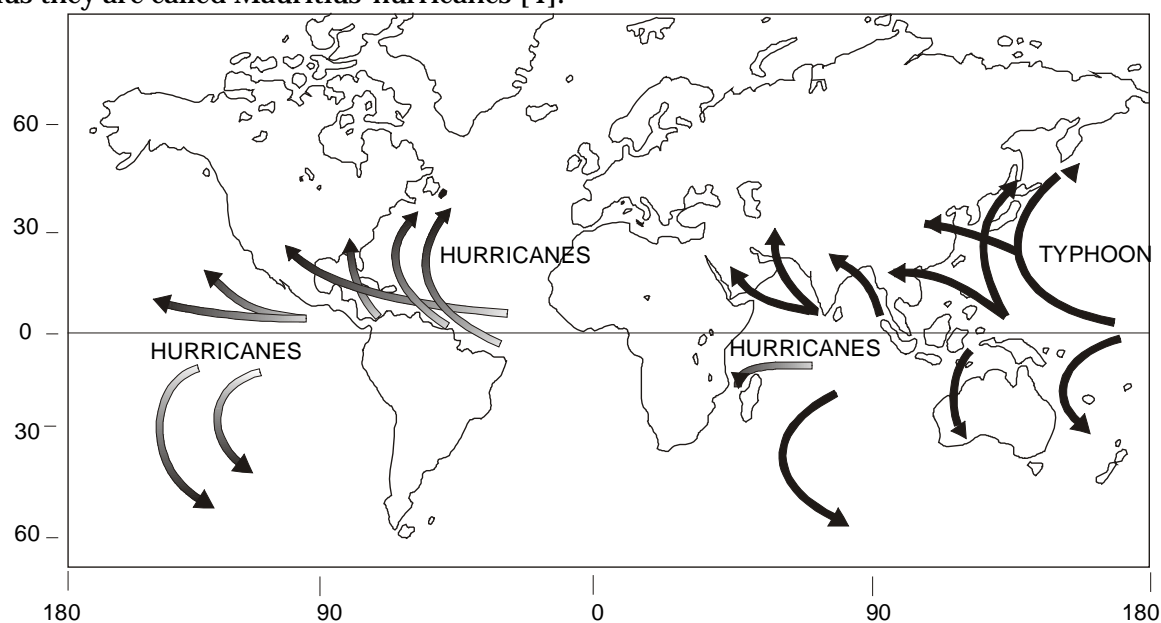

Figure 1. Hurricane development and behavior [4]

As shown in Figure 1, hurricanes develop within about 2000 km of the both side of the equator, over areas of very warm water (27°C or greater). Each begins its life cycle as a poorly organized tropical disturbance. If conditions are favorable, its moves through the successively stronger of a tropical depression and tropical storm.

There are wide variations in the intensity of tropical cyclones. They are far above the threshold for wind power in hurricanes. So, it is not strange that hurricanes very often reach wind speeds of over 100 kt. In Table 1 we gave the ranking of hurricane strength according to their wind speed and the potential damage they can cause [5].

Table 1

Sapphire-Simpson scale of the potential damage caused by hurricanes. Adapted from ref. [6].

Category	Pressure (hPa)	Wind (kt)	Storm surge (ft)	Damage
1	> 980	64 - 82	4 - 5	Damage mainly to trees; shrubbery and unanchored mobile homes.
2	965 – 979	83 - 95	6 - 8	Trees blown down; exposed mobile homes; damage to roofs of buildings.
3	945 – 964	96 - 113	9 - 12	Large trees blown down; mobile homes destroyed; damage to small buildings.
4	920 – 944	114 - 135	13 - 18	All signs blown down; extensive demage to roofs, windows and doors; complete destructions of mobile home; flooding inland as far 10 km; major demage to lower floors near shore.
5	< 920	> 135	> 18	Severe damage to windows and doors, exentive damage to roofs of homes and industrial buildings; major demage to lower floors of all structure less than 4.5 m abave sea level within 500 m of shore.

Because of the devastating effects that tropical cyclones produce, due to the strong wind and huge waves, many tropical cyclones entered the history books. The first written report of tropical cyclones comes from Christopher Columbus. In this report, the famous sailor described a storm which occurred on the 12th of February in 1493, near the Azores when he was on his way back from America. Perhaps the greatest disaster caused by a tropical cyclone was the one which occurred on the 7th of October, 1737, at the mouth of the river Hull in the Bay of Bengal. A terrible cyclone had destroyed about 20,000 craft shops of all kinds, and a huge wave rose up to 43 ft. It was noted that at the time 300,000 people were missing. In the same place another disaster happened in 1864 when 50,000 people were killed. According to the available data, the largest flood wave created by a tropical cyclone occurred on the 30th of June in 1905, on the Mail island in the Marshall Archipelago, where the wave reached a height of 49 ft [3].

3. Hurricane Katrina

Hurricane Katrina is reputed to be the most expensive natural disaster that has ever happened to the United States. It is also the cause of the largest number of victims since September, 1928 when a hurricane hit Lake Okeechobee. Katrina was also one of the most powerful storms that hit the coast of the United States over the last hundred years. Winds from the mainland reached 127 kt (a strong category 3 hurricane according to the Sapphire - Simpson scale) and a minimum pressure in the center of the hurricane was the third lowest ever recorded (920 hPa).

Katrina caused colossal damage along the central coast of the Gulf of Mexico in the United States. Floods in New Orleans which were caused by the hurricane, were devastating and resulted in the relocation of 250,000 people. The hurricane has killed more than 1,800 people and caused a total damage of 125 billion dollars [1, 2].

3.1 Chronology of the hurricane

During the period from the 25th to 31st of August, 2005, hurricane Katrina brought about the series of destruction through South Florida, as well as in the southeastern parts of Louisiana, Mississippi and Alabama. The storm then suddenly began to move towards the states of Tennessee and Kentucky on the north, and then it began to move in the north-eastern direction where the main consequences of the hurricane were the abundant rainfalls.
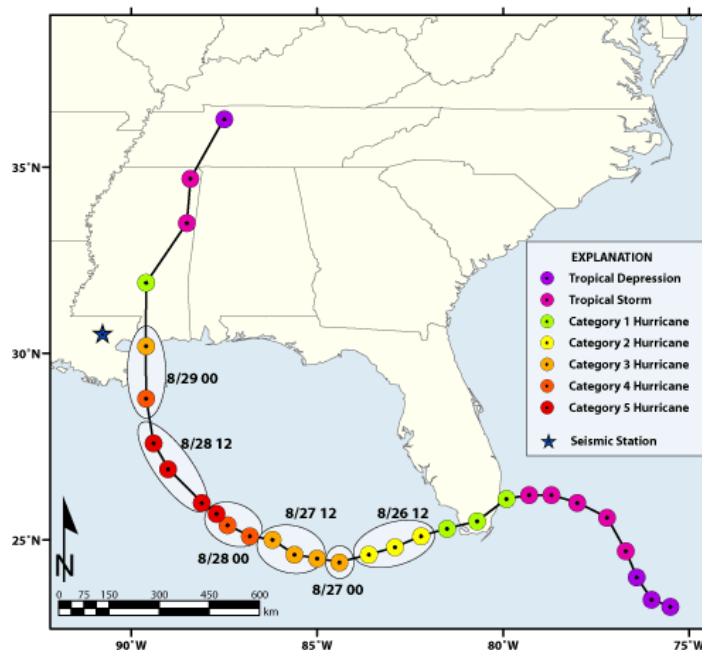

Figure 2. The pathway of Hurricane Katrina. Adapted from ref. [1].

Hurricane Katrina was formed on the 23rd of August as a tropical depression, 175 nm southeastern from Nassau on the Bahamas. Suddenly, the next day, the hurricane got more powerful and turned into a tropical storm which was moving through the central parts of the Bahamas.

Katrina slowly moved westward and gradually turned into a first category hurricane. At 6:30 PM, the hurricane reached land somewhere between Hallandale Beach and North Miami Beach with a wind speed of 80 kt, but at certain moments the wind also reached speeds of 90 kt. Despite the fact that the hurricane moved in the southwestern direction over the southern parts of Florida by night, the wind speed was only partially reduced and in a short period of time the hurricane strength returned to its previous state after passing over the warm waters of the Gulf of Mexico.

After coming into the Gulf of Mexico, Katrina began to move towards West. The high air pressure in mid-atmosphere above Texas slowly decreased and moved to the West, which enabled Katrina to turn gradually in the northwestern direction , and then towards northern places where the air pressure was being reduced in the following days. The conditions in the air, as well as on the sea surface were very convenient for further development and strengthening of the hurricane which made Katrina turn into a high category hurricane on the 26th of August in the afternoon hours.

During the next day, the hurricane strength was constantly increasing and on the 28th of August, on Sunday, Katrina became a category five hurricane with wind speeds of 160 nm per hour and with the air pressure of 908 hPa.

Three hours later, the wind reached its maximum speed – 175 mph and it stayed unchanged until late afternoon. During this period, Katrina was at maximum power not only with strong hurricane winds which hit the area 105 nm from the centre but also with the strong tropical winds

which reached 230 nm from the centre. These winds hit the southeastern coast of Louisiana as well.

By night, Katrina continued to move towards Louisiana and at 4 AM on Monday, 29th of August, the hurricane centre was 90 nm southeastern from New Orleans. Despite the fact that the strength of the wind was reduced to 150 kt, the strong gusts of wind could still be felt along the coast. A 55 foot wave was recorded near the mouth of the Mississippi River which still remains the greatest recorded height of such a wave.

At 6:10 PM, Katrina reached land near Plaquemines, south from Buras, located between Grand Isle and the mouth of the Mississippi, as a hurricane of the third category, despite the previous absorption of dry air. The wind speed on land was about 127 kt with the central pressure of 920 hPa, which was the third lowest pressure ever recorderd in USA. At the same time, the winds with speed of 96 kt were blowing near the place Belle Chasse and 85 mi from New Orleans.

At 10 AM, for the second time, the eye of the hurricane reached the land between the northern coast of the Gulf near the border between Mississippi and Louisiana. The northern part of the hurricane was still very powerful with the speed of 121 kt. Even a few hours later, far away from the centre of the hurricane near the Dauphin Island in Alabama, the wind speed was 76 kt with sudden gusts of wind over 102 kt.

Katrina continued to lose its strength while it was moving towards northeast during the entire day. At that time Katrina still had the hurricane strength, even though it was 100 mi inside the land near the place Laurel in the state of Mississippi. Around 7 PM, 30 mi northwest from Meridian, the hurricane had lost its strength and became a tropical storm. Finally, on the 30th of August, Katrina became a tropical depression near Clarksville, Tennessee [1].

3.2 Effects of Hurricane Katrina in South Florida and Cuba

Hurricane Katrina reached the mainland for the first time on the 25th of August in the southern part of Florida where it still was a hurricane of the first category with wind speeds of 80 kt. Rainfall was abundant in some places and exceeded 14 in (352.8 mm) and created waves from three to five feet high. About a million people were left without power and the damage was estimated between one and two billion dollars as a direct result of huge flooding. It was reported that 14 victims lost their lives because of the hurricane.

Most of the Florida Keys island chain was invaded by tropical storm winds while the hurricane passed just north. The amount of rainfall was also high, about 10 inches. A Tornado which was formed from the rain belt of the hurricane swept through a hangar at the airport, where it caused damages of about five million dollars.

Although the hurricane was far away from Cuba, on the 29th of August it brought strong winds and eight inches of rainfall in the western parts of the island. As a result, telephone and electricity networks were damaged and about 8,000 people were evacuated. The coastal city Surgidero de Batabano was mostly under water [7, 8].

3.3 Effects of Hurricane Katrina in Louisiana

Hurricane Katrina hit a part of coastal Louisiana, on the 29th of August as a third category hurricane with wind speeds of 125 mi. However, since it decreased from the fourth to the third category, and the diameter of the wind was still high, it is possible that a fourth category hurricane hit southeastern parts of Louisiana for a short period of time. Although the wave of water on the east in the Mississippi was higher, a large wave hit Louisiana too. The height of the wave is not known precisely because of the lack of data, but one of the indicators is the tide level measured in Plaquemines which showed that the storm tide was 14 ft above normal.

Katrina also brought heavy rainfall, about 10 inches in the eastern part of the state. In some areas, 15 in of rainfall was measured. As a result of rainfall and waves, the water level in Lake Pontchartrain rose which caused major flooding along the northeastern coast of the lake during which several bridges were destroyed. Moreover, about 900,000 people were left without electric power as a direct result of the hurricane [7, 8].

3.4 Effects of Hurricane Katrina in New Orleans

While the hurricane was moving to the northeast, hurricane conditions rampaged the city for several hours. Although power failures prevented the measurement of wind speeds in many places

around the city, in some places where measurements were still possible, the hurricane wind speeds corresponded to those of the first and second category.

Water waves caused by the hurricane led to the destruction of the levee system that protected the city, which caused floods in about 80% of the city. Most of the major roads leading to and from the city were damaged as well as most of the bridges.

A huge number of windows on the north side of the Hyatt in New Orleans was destroyed as well as other high-rise buildings. Hyatt is a hotel that has suffered the most damage with beds literary flying out the windows from each of the floors. The entire exterior of the hotel, which was made of glass, was completely destroyed and there was only a skeleton left which held the windows.

The Municipal Stadium, which was the last refuge for those who have not been evacuated, also suffered extensive damage. The roof of the stadium was destroyed and the waterproof membrane was peeled off under the influence of strong winds. The main airport was closed before the storm but it was not flooded. It was re-opened on the 30th of August, when humanitarian and rescue actions started. The airport began to operate normally at the beginning of October.

The destruction of levees caused a large number of victims, and about 700 bodies have been discovered by the end of October. Some survivors have reported bodies in the streets and floating bodies in still flooded areas especially in the eastern part of the city. Because of rapid disintegration of the majority of bodies under the influence of rain and sun for several days, the identification of them was much more difficult. There were also victims at the city stadium, but only six cases were confirmed, four deaths from natural causes, one of which was a result of an overdose and one suicide [9, 10].

3.5 Effects of Hurricane Katrina in Mississippi

The coastal part of Mississippi suffered massive damage caused by the hurricane which happened on the 29th of August, when 238 people lost their lives and 67 people went missing. The property damage was estimated to be billions of dollars because many bridges, ships, boats, piers cars and houses were destroyed and "carried over" inland.

After reaching the Louisiana mainland, Katrina soon approached the limits of a category three hurricane near the places of Waveland and the Bay of St. Louis with wind speeds of 120 kt. Katrina's powerful right-front quadrant passed over the west and central Mississippi coast causing a powerful water wave with a height of 27 ft, which was going 6 miles inland in many areas and 12 miles inland along rivers and bays. Katrina also brought strong winds that destroyed large numbers of trees and thus caused tremendous damage throughout the state. Unofficially, the strongest gust of wind was 135 kt near the town of Poplarville.

The storm also brought heavy rainfall, from eight to ten inches in southwestern Mississippi and about four inches in other parts of the country. Katrina also caused 11 tornadoes on the 29th of August which damaged the trees and the power grid.

Being hit by wind, rain and waves of water, some coastal villages were completely razed. It was estimated that about 90% of the buildings in the area half a mile distant from the shore were completely destroyed. One apartment complex with approximately 30 people who stayed inside for protection was completely destroyed. More than half of the total of 13 floating casinos that were located on the water in order to avoid the gambling laws that apply to the land were thrown a few hundred yards on the ground. A large number of streets and bridges have been taken away by water and about 900,000 people were left without electricity [1, 2].

3.6 Effects of Hurricane Katrina in other states

Although the hurricane mainly hit the parts western from Alabama, this state has also had consequences caused by the hurricane. Around the Bay of Mobile, water waves were up from 12 to 16 ft while the wind was blowing with speeds of 67 kt. Water waves caused massive flooding along the Gulf of Mobile. Four tornadoes were also reported. Ships, oil platforms and piers were washed onshore along the Gulf.

Along the northwestern part of Florida, the water wave was about five feet high. In the town of Pensacola, wind was blowing at the speed of 56 kt on the 29th of August. Wind threw trees and caused damage to some buildings. In some places there had been minor floods. Around 77,000 people were left without electricity.

North and Central Georgia were affected by heavy rain (about 3 in) and strong winds as the hurricane moved towards the interior. At least 18 tornadoes were formed on the 29th of August, which is a record number for a single day. One tornado caused three injuries and one death as well as damage to several houses. It has also destroyed several chicken barns and killed about 140,000 chickens. Several other tornadoes have caused significant damage to buildings and agricultural facilities.

The power of the hurricane decreased after coming onshore, but from time to time strong winds could be felt on the north, near the place Forth Campbell in Kentucky, on the 30th of August. The wind also destroyed a lot of trees in New York, and brought a lot of rainfall to the wide area of the eastern United States. The amount of rainfall of 2 inches and more was present in 20 states of USA. As a result of Katrina, a lot of tornadoes were formed on the 30th and 31st of August, which was a cause of minor damage in some of the regions. As a direct consequence of Katrina, 62 tornadoes in 8 states were formed.

The eastern part of the state of Arkansas did not get such a big amount of rainfall. Strong winds destroyed several trees and wiring, but the damage was minimal. The storm which happened a week earlier caused major floods in Kentucky and the rainfall caused by Katrina made the situation even worse. Due to these floods, a few areas were reported to be totally devastated and a state of emergency was announced. One person lost a life, and one part of a school was destroyed. Consequently, the people had to be evacuated in West Virginia and in Ohio. The rain in Ohio indirectly caused two deaths and a lot of areas stayed without electricity especially in Tennessee, in the parts near Memphis and Nashville. The state of Texas did not have any major damage directly caused by the hurricane, but this state was a shelter for about 220,000 people, mainly from Louisiana, which exhausted its resources.

The remains of the hurricane were absorbed by a new cyclone, east of Pennsylvania. This cyclone continued to move in the northern direction and arrived in Canada on the 31st of August. In one part of Ontario, about four inches of rainfall was measured and a few cases of damage caused by falling trees were recorded. Quebec and Ontario were under the floods which caused the isolation of a few villages in Quebec [1, 2].

3.7 Economic impacts of Hurricane Katrina

The economic impacts of the hurricane were enormous. The Bush administration spent about 105 billion dollars for restoration and revitalization of the region. Major damage to the economy was caused by restriction in the oil production, destruction of the infrastructure on the highway along the shore of the Gulf of Mexico, as well as the fact that the export of grain products was thwarted. Katrina immensely damaged about 30 oil platforms and caused the closure of nine oil refineries. The total oil production in the Gulf of Mexico, six months after Katrina, was about 24% of normal production, and the production of gas was also decreased to 18% of normal production. Due to an enormous fear that oil production will decline for one third in comparison to normal, the price of oil suddenly increased but not evenly in all regions. There was a lot of complaints in Louisiana and other areas due to the sudden increase of prices, not only the prices of fuel but also the prices of other necessities such as bottled water. In some areas the price of fuel was 6 dollars for a gallon, which was much higher than normal. Before the hurricane, the price for a gallon was about 2.5 dollars. The international fuel price also increased. In the United Kingdom, for the first time in the history, the price of oil reached one pound for liter, which was three times more than before the hurricane. On the 7th of September, the oil production in the Gulf of Mexico reached 42% of normal production. Out of 10 refineries that Katrina closed down, 4 were supposed to start their normal production in a week time, but also 4 of them were not ready to start their production for several following months.

The timber industry in Mississippi was also hit due to the destruction of 3,293 mi² of forest areas. The total damage to this industry, caused by Katrina was estimated to be around 5 billion dollars. One hundred thousand people lost their jobs, which meant that the tax revenue would also decrease. Before the hurricane, there were around one million non-agricultural jobs in the region, of which around 600,000 were in New Orleans. The total economic loss in Louisiana and Mississippi is estimated to be around 150 billion dollars.

The hurricane also closed down a wide array of casinos along the shore of The Mississippi. The Hard Rock hotel and casino were expected to be opened on the 1st of September, but due to the

hurricane, they opened on the 30th of July in 2007. The Beau Rivage hotel and casino was heavily damaged by floods which came up to the third floor, but it seemed less damaged than the other objects on the shore. The Grand Casino in Biloxi was washed ashore, as well as many others. The President casino was also washed ashore and it finished on the top of the Holiday Inn Hotel, 1 mi from its original location. Before the hurricane, around 14,000 people were employed in some of the numerous casinos along the shore. Casino Hara in New Orleans closed just before the hurricane, but it was opened again on the 17th of February in 2006, just in time for the Mardi Gras Carnival.

Mississippi was losing about 500,000 dollars from taxes every day, while the area around Biloxi, known for casinos, was closed. For instance, in 2004, Mississippi had an income of around 2.7 billion dollars from numerous casinos, and it was in third place, after Nevada (10.3 billion) and New Jersey (4,8 billion) [1, 2, 11].

The hurricane had destructive influence on the tourism of this area too. As a result of its influence all tourist activities were thwarted. The tourism industry in New Orleans, which is worth around 5 billion dollars, needed 5 years to recover from the hurricane and reach the same level of tourist visits it had before the hurricane. Before the hurricane, in 2004, New Orleans was visited by an astonishing number of 10.1 million tourists. The number of visitors in 2006, after the hurricane, was 3.7 million, and in 2009 around 7.9 million visitors [8].

Katrina was the factor which influenced around million of people to move from the Gulf of Mexico to other parts of the USA, which was the highest number in the history of this country. In Houston, the number of people increased for 35,000, in Mobile for 24,000, in Baton Rouge for 15,000 and in Hammond for 10,000 which was double then it was before. Chicago was the city in which the highest number of people (6,000) came in comparison with other cities in the north. In January 2006, around 200,000 of people lived in New Orleans, which was less than a half of the number of people which lived there before the hurricane. In July, when the number of people was estimated again, Louisiana had around 220,000 people less than before. Some of the insurance companies started refusing to insure the houses, while the others raised the prices for insurance in the region, due to the high costs caused by hurricanes Katrina and Rita [1, 2].

3.8 Ecological impacts of Hurricane Katrina

Katrina has also had a significant impact on the natural environment. Big water waves caused significant erosion of many beaches and in some places they completely destroyed coastal areas. Water waves caused by Katrina completely destroyed Chandelier islands which were also damaged in the previous year during a hurricane. The U.S. Geological Survey has estimated that about 560 km² of land has been converted into the sea due to the impact of hurricanes. The lost land was used for reproduction of various marine mammals, pelicans, turtles and certain species of migratory birds. Overall, about 20% of the local marshes were permanently flooded as a result of the hurricane. Katrina has also caused the closure of 16 shelters for wild animals. Many of them have lost habitats in the storm. The hurricane had a negative impact on the habitat of sea turtles, cranes, woodpeckers and many other species.

The hurricane also caused oil spills from 44 facilities throughout Southeast Louisiana, which led to a spill of 26 million gallons of oil. Most of the spilled oil is retained on-site, but in some places the oil has entered the ecosystem as was the case in the town of Mero which was flooded with a mixture of oil and water. Officially, there weren't any oil spills reported on land but on the sea surface in some parts of the bay it was clearly visible.

In the action of cleaning New Orleans, all the water that flooded the city was pumped into Lake Pontchartrain which lasted 43 days. This water contained a mixture of sewage waste, bacteria, heavy metals, pesticides, toxic chemicals and oil which led to the fear that wildlife in the lake could be seriously affected [1, 2].

3.9 Looting and violence

Shortly after the hurricane, on the 30th of August in 2005, some residents of New Orleans who stayed in the city began to loot local stores. Many of them were in search for food and water, which have not been available in any other way, but a lot of them were also taking other things that were not necessary for survival. Reported cases of car theft, murders, and rapes were all over the headlines. Some sources later determined that most of these reports were not accurate because of

the chaos. Thousands of members of the National Guard were mobilized (the total number increased from 7,800 as it was the day that the hurricane swept the land to 46,800 as it was on the 10th of September) and sent to Louisiana along with local police from other states which was temporarily deployed here. Many incidents of gunfire between police and residents of New Orleans happened but soon order was established. Many arrests were carried out throughout the area and a temporary jail was built at the railway station.

In Texas, where there were more than 300,000 refugees, the local authorities have checked the files of 20,000 people and found that around 45% of the refugees have some kind of criminal offenses in their files, and that 22% have some kind of offenses involving violence. The number of homicides in Houston from September 2005 to the end of February 2006 was 23% higher compared to the same period the previous year. In 29 out of the 170 murders, someone from Louisiana was involved either as a victim or a suspect [12].

4. Conclusion

As it can be seen from this paper, hurricanes are relatively common in the United States and generally occur in the Gulf of Mexico. Despite all the technology and the advancement of the human society, hurricanes cannot easily be prevented, but it is possible to significantly reduce the damage and loss of life by predicting hurricanes and evacuating residential areas. In the last hundred years, in the U.S., there were only two hurricanes which have made more damage and took more lives than Hurricane Katrina. About 1,600 lives were lost and a record damage of over 100 billion dollars was caused. Moreover, thousands of people stayed homeless and permanently relocated. The area affected by the hurricane is still not fully recovered, both economically and in every other way.

The oil industry needed a few years to get back on its feet. The environment in this area was significantly disturbed and threatened. Tourism which is an important part of the economy of the area has experienced a complete failure and is still recovering. The image of this area as a tourist destination was significantly disrupted which caused a huge decrease in the number of tourists, but their number is now gradually increasing year after year. At least one positive thing for the tourism of the area came as a result of the hurricane in the form of organized sightseeing tours in the areas devastated by the hurricane. These tours brought new tourists and contributed to the recovery and re-popularization of the destination. Not all are supporters of this approach but it is certain that the Americans know how to seize even the most severe disaster and turn it into an attraction which is extremely positive and useful.

Certainly, hurricanes are a constant threat to the tourism development of the region and the whole economy in general but people get used to them and adapt their lifestyles. They are always aware of the risks and the frequent and considerable material damage and in accordance with these facts they have adapted their life to such circumstances which is not always easy and simple.

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Последствия урагана Катрина в промышленности Соединенных Штатов туризма

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Аннотация. Целью данной работы является представление урагана Катрина на всех ее этапах, от начала до конца и, чтобы выделить экономические, экологические и социальные последствия, которые произошли в связи с последствиями урагана с акцентом на индустрии туризма. Эта статья также кратко объясняет основной механизм тропических циклонов и ураганов и их появления путем детального объяснения урагана Катрина и ее влияние на Соединенные Штаты. Некоторое внимание уделяется также огромный ущерб и последствия которая является крупнейшей когда-либо сделанных любой ураган.

Ключевые слова: Катрина; ураганы; Соединенные Штаты; туризм.