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CHALLENGES AND OPPORTUNITIES OF ENGLISH GRAMMAR ACQUISITION BY DISTANCE AT THE TERTIARY LEVEL

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Abstract. Distance learning introduced in almost all educational establishments in spring 2020 has raised interest among researchers how to deal with it in a more productive way. Thus, the goal of the research was to find out undergraduates' views on distance learning of English grammar and the use of online revision materials in developing students' independent study skills at a tertiary institution in Latvia. The research tool was a questionnaire consisting of open-ended and closed questions. Twenty-three students answered the survey questions. The research results indicate that studying by distance is preferred because it allows the students to choose the study time and place, to develop their time-management, independent study skills, as well as improve their motivation. The main drawbacks of studying by distance, according to the students, are insufficient feedback, inability to ask questions directly and receive immediate answers and problems with their own time management and independent study skills.

Key words: English grammar acquisition, distance learning, independent study skills, tertiary level students

INTRODUCTION

During the Covid-19 pandemic, all students and teachers had to get used to distance studies, which was the only mode offered instead of in-class activities. Moore, Dickson-Dean and Galyen's (2011) research revealed that there is no unanimous perception how to view distance learning because of its different learning environments. One of the learning environments used during the pandemic was online, which includes both real-time online classes and/or only the use of various platforms for independent studies. Online learning is viewed as an updated form of distance learning (e.g. Benson, 2002), mainly employing communication technologies (Lowenthal, Wilson and Parrish, 2009). Also, irrespective of the pandemic, mobile learning (Bernacki et al., 2020) and, especially Computer Assisted Language Learning (CALL) have recently gained

popularity in language classrooms, and practitioners are seeking how to use computers in their classrooms more successfully (Chambers and Bax, 2006; see a more detailed analysis of research trends in Stickler and Shi, 2016; also Seaman et al.'s study, 2018). E-Learning (i.e. learning delivered to an electronic device, e.g. a computer, via an Internet channel) or M-Learning (i.e. learning delivered via a portable device, e.g. a tablet) 'supports both autonomous and collaborative learning', students can work at their own speed and have a larger role in their study process, and all that depends on teacher's skills of applying ICT (i.e. Information and Communication Technologies) resources and organizing their classes (Granić et al., 2009). Chambers and Bax (2006: 477) emphasize that teachers should receive 'sympathetic support, both technical and pedagogical' to help them integrate 'computer activities with non-computer activities' as well as being able to 'fit the software to their students' particular needs'. the goal of integration of ICT in educational institutions is to provide a more flexible learning mode and to meet diverse student needs (Arrosagaray et al., 2019: 32).

Prior studies on student satisfaction about online English courses revealed that students had a positive attitude towards it (Ekmekeçi, 2015). Ekmekeçi's research demonstrates that students might have a negative attitude towards distance education when it concerns language learning, which includes four language skill development. the students wanted more listening, speaking and writing in their courses, while reading and grammar seemed to be sufficient in proportion. They considered that they did not get enough feedback from their teachers, they did not like the assignments and examinations, while they liked that they could study when and where they wished. Ekmekeçi considers that there is little research on language student views about distance learning.

As in spring 2020 due to the pandemic many universities and schools were forced to move to teaching by distance, the goal of the present study was to find out undergraduates' views on distance learning of English grammar and the use of online revision materials in developing students' independent study skills at a tertiary institution in Latvia.

The research questions were:

- 1) What are the benefits and drawbacks of acquiring English grammar by distance at a tertiary level?
- 2) In students' opinion, how does the availability of online study materials and materials for revision enhance the development of students' independent study skills?

THEORETICAL BACKGROUND

1 DISTANCE LEARNING

The latest research demonstrates that distance learning gains more and more popularity in the world where thousands of distance courses are offered to

students at different levels and in different study programmes, which results in large dropout rates and, consequently, interest in how to solve this problem (see e.g. Gregori et al., 2018). Gregori et al.'s (2018: 49) research demonstrates that among the problems of distance learning is (1) a lower level of maturity of undergraduates than master level learners, (2) the duration of courses, (3) the need to study online instead of on-campus, (4) the need for 'more specific learning material or a suitable Internet connection [...]', (5) 'the difficulty of distance learning'. They suggest several solutions how to help students get used to distance learning. The first is the initial contact. They also suggest organizing the first class in person or at least 'virtual joint session' where students learn about the content of the course and how to communicate with the teacher. For those students who cannot be present during the first session, Gregori et al. (ibid.) propose to video-record it or try to negotiate the date and time with all learners. The second is the tutoring. They consider that students should be guided by using 'news, announcements, recommended study materials', in addition, the teachers need to organize both 'virtual and face-to-face' tutorials so that students can study regularly. The communication could be done by email or videoconferences (ibid.). The third suggestion is continuous assessment when learners can perform written examinations, oral presentations, written essays and exercises or problem-solving tasks (ibid.: 50). They also emphasize that teachers should not overload learners so that they can manage all subjects. The fourth aspect is final assessment, which should reflect the result during the term and the final examination (ibid.). The examination requirements must be set clearly, as well its grading (ibid.). The final aspect is the way how to identify or verify the test takers' identity. A solution for that could be a videoconference or even a face-to-face examination (ibid.: 51). The linguists emphasize that the basic principle for successful distance learning is regular communication with students, for example, by using emails for reminders and the use of the Virtual Classroom to help students to manage some delayed tasks or solve their problems (ibid.).

Arrosagaray et al. (2019) assert that more research on adult student (aged 25-64) attitudes to ICT (Information and Communication Technologies) is needed. Their study on heterogeneous adult students dealt with such modes as face-to-face, blended and distance language learning to find out student 'confidence in digital competence, the ICT impact on their learning and their reception of the learning potential of ICT' (ibid.: 31). They noticed 'a reduction in communication, interaction or social exchange' when courses were offered in the distance mode (ibid.: 37). They also concluded that there was not real difference in learners' motivation when distance learning was offered even if it ensured more benefits to students (ibid.); moreover, the respondents claimed that ICT had a good impact on their learning results as they 'feel more independent', and 'they understand more easily what they are learning', a computer offers more 'fun' in their learning process (ibid.: 37). However, male students were more confident than female when working with computers, the same referred to younger learners if compared with older or retired people (ibid.). It was interesting

that the students from the distance learning groups felt more self-confident if compared with the students from the other learning mode such as classroom or face-to-face and blended learning (ibid.). Another study demonstrated that both modes, face-to-face and online learning, can be effective (see Driscoll et al., 2012: 323). Driscoll et al. (2012: 323) also emphasize that students who are prone to collaboration with peers and instructors are more satisfied with both types of courses. However, their population in both the modes differed. Online courses were taken by older students with lower level of knowledge but more experience with online studies, where fewer hours were offered per week, while the face-to-face students had better performance and more classes (ibid.: 325). Despite the differences, it is important the courses are well-structured and ‘with simple and effective instructions’, as well as that lower level students, who are not so independent in their studies, receive more interaction with the instructor (ibid.). Driscoll et al. (ibid.: 326) believe that the online learning ‘if designed properly’ can be as successful as face-to-face learning.

Prior research asserts the importance of learners’ motivation in their studies (Trowler, V. and Trowler, P. 2010), especially in the use of new technologies in language learning (Chang, C., Chang, C.-K. and Shi, 2016). V. Trowler and P. Trowler’s (2010: 13) research demonstrates that engagement in the study process is essential to ‘least prepared’ learners for university education. Such types of students may be found among international students, students with disabilities, part-time, returning and many other types. They may perceive insufficient engagement negatively because they may feel isolated or even foreign at university. Some researchers (e.g. Cheng, P. and Ding, 2021) have concluded that students from other cultures such as China may have a lower performance and engagement in Western Higher Educational Institutions than local students. P. Cheng and Ding’s study (2021) emphasises the importance of revision in language learning as after the completion of online review exercises, student performance increased. the importance of assessment in promoting student motivation is also emphasized by P. Cheng and Ding (2021). High-quality online learning can be achieved if learners are interested in their studies (Ramsden, 2003) and have Internet self-efficacy, which must be promoted (Liang and Tsai, 2008). Low level English proficiency students and students who are used to a teacher-centred learning usually do not exhibit the ability of high-quality learning (Cheng, P. and Ding, 2021). Another factor influencing the learning process negatively is ‘an excessive amount of material [low level students] cannot cope with’ (ibid).

Hu et al.’s study (2018) across 44 countries revealed unexpected conclusions concerning correlation between ICT availability, use and attitudes to it, on the one hand, and student performance in mathematics, reading and science at school, on the other hand. If students had ICT at home, it did not give a positive influence on their performance, and the researchers concluded that the reason for that could be its bad quality or addiction to other activities which were not linked with studies (ibid.: 9). They also found that if ICT was used at school, even

with high frequency, it may not provide a positive effect on students' learning, but 'may even be detrimental' to it. As regards ICT use at school, the findings were mixed as the results might depend on a subject (ibid.: 9-10). Hu et al. (ibid.) found a positive correlation between learner academic performance and their interest, competence and autonomy in using ICT. Also, other researchers emphasize that learners need to be motivated to use online learning, be flexible, ready to do self-evaluation, have access to the needed mobile device or computer, have Internet access, have computer literacy, be able to manage their time and actively participate in the study process (Frith, 2013).

Lee, Choi and Cho (2019) who researched adult learners' experiences in a distance programme, namely, how they became self-regulated learners, concluded that adult learners had different experiences, and also different needs and interests. It turned out that such type of learners preferred if they were provided with detailed instructions, namely, 'what to do and how to perform' the task and that had already been done at the beginning of their studies. They also concluded that 'adult students' distance learning experiences can be developmental and transformative (rather than being pre-determined or instrumental) (ibid.: 32-33).

Griffiths (2016: 160) distinguishes several distance or online learning types: (1) in-person; (2) web-enhanced with part of the course content and assignments are available online; (3) partially online, where 20 per cent of classes are online; (4) hybrid or blended learning, where 33-80 per cent classes are online; (5) online, where 80 to almost 100 per cent of classes are online and (6) fully online. a large number of research papers on distance learning can be found in 2020 when the whole world was forced to do remote teaching because of pandemic restrictions. Al Lily et al. (2020) discuss its influence on Arab culture when conventional distance learning was forced without any preparation, when involved instructors felt incompetent, which in its turn might 'compromise education'. Another stressor was the need to do distance learning or teaching from home. They named it Crisis distance education (CDE), which in contrast to before-existing distance education, was organized during the pandemic as an additional variable added in the situation when nothing could be done face-to-face (ibid.: 1-2). In 2020 spring term, students could not choose another option for their studies; they were forced to do distance learning at home even if they did not have appropriate equipment (e.g. a computer, a good Internet connection) or place where to do that as several family members had turned their home into either school or workplace.

Several studies (Dendir and Maxwell, 2020; Golden and Kohlbeck, 2020) have discussed student academic dishonesty when taking online tests and examinations, which was the only option offered during pandemic isolation. Dendir and Maxwell's (2020) research provides evidence that students showed lower performance in online courses when a webcam recording software was used at the examinations. If testing is done online, students can access to different instructional materials, including homework assignments and even test banks (Savage and Simkin, 2010; Cheng, C. and Crumbley, 2018). If test takers use test banks, they can paraphrase the questions, so that the students do not

easily get access to the answers (Golden and Kohlbeck, 2020). If live proctoring is chosen to avoid cheating, it can, in its turn, decrease student numbers in online courses (Dendir and Maxwell, 2020: 9). Another solution offered is to introduce sanctions if a student is caught using restricted materials and require other students to report about cheating (Savage and Simkin, 2010); however, then there should be a more reliable way how to prove that and not always other students will be interested in reporting about their friends. It is also suggested that instructors use more in-depth means of checking learners' knowledge (ibid.)

2 GRAMMAR ACQUISITION AT THE TERTIARY LEVEL

As stated by Larsen-Freeman (2015: 263-264), despite researchers' suggestions to move from the traditional approach to grammar acquisition, practitioners still focus on accuracy in their classes, and students also value that approach as useful. She also admits that not all rules can be deduced from context and that students prefer the deductive approach (ibid.: 268). Nassaji (2017: 205) views grammar as acquisition of 'rules and structures and the ability to use them in a communicative context'. There is a debate whether grammar is consciously learnt from rules or 'acquired in the context of meaningful language use' (ibid.: 205). There are two types of learning, i.e. explicit and implicit. As the advocates of the Noticing Hypothesis in Second Language Acquisition (e.g. Schmidt, 2001) claim, explicit knowledge helps learners to notice certain linguistic forms subconsciously and incorporate them later into communication if students are developmentally ready for that. Therefore, it is suggested that learners should be exposed to different communicative tasks where forms are used in different contexts (Ellis, 1993; Ellis, 2005; Ellis, Basturkmen and Loewen, 2002; Larsen-Freeman, 2013; Ellis, 2015).

Long (1991: 45-46) distinguishes between 'focus on forms' when language is studied in separate sentences and 'focus on form' when learners view language as a means of communication. If L2 (second language) learners focus only on communication or meaning, they will not manage to master the target language 'to achieve full native-like competence' (Long, 1998: 35). Instead, he proposes that the focus on linguistics features is also needed when completing communicative tasks (ibid.). However, Ellis (2016) considers that *focus on form* may refer not only to grammatical form, but also lexical, as well as pragma-linguistic aspects. Also, other scholars hold the same view that it is not sufficient to focus on discrete-point grammar learning (Ellis, 2006; Nassaji and Fotos, 2010). Ellis (2006) considers that both approaches are effective if combined; namely, the target forms are used for communication when performing different tasks. When studying tenses, it is also essential to deal with their indicators or linguistic signals in a text, such as time adverbs.

Larsen-Freeman points out that there is no unanimous view among researchers how much to centre on form in the classes of grammar; moreover, it depends on student needs (Larsen-Freeman, 2015: 271). For example, students

majoring in linguistics need to focus both on accuracy and fluency in their studies. the deductive approach could also be more time consuming and, thus, less productive if employed in a limited number of grammar classes at the tertiary level. Moreover, there are many other courses in the target language where students can practice grammar use in different contexts, which helps to balance the various needs of future specialists.

METHODS AND MATERIALS

The present study considers the undergraduate students' opinion about acquiring English grammar by distance. As distance learning was a mode imposed by external circumstances, namely 2020 pandemic restrictions, this can be more considered an introductory study on the above topic because only fifty full-time students taking an English grammar course at a university in Latvia in the respective study semester were involved; thus, the sample size is rather small to generalise, but it can provide material for future research. the students were majoring in English philology or language and business studies.

Out of total 16 weeks of studies, the students studied face-to-face for six weeks, and the rest of the course was held by distance, so it can be stated that the initial contact in person was ensured, and the overall acquisition process of English grammar can be referred to as blended learning, although only the second part of the studies was conducted by distance. All the course materials and assignments were available online, on the Moodle platform. the students were provided with answer keys for all the assignments meant for independent studies. No anxiety was expected to be triggered regarding the use of the materials and the Moodle platform as it has been used at the university for many years, and the students were familiar with it because this was already their second or fourth semester at university. However, the tests and the examination that were either held online on the same platform or distributed electronically via emails and timed in both cases were a new experience to the students.

During these ten weeks of learning by distance, the students were supposed to study on their own, but tutorials were available via email correspondence and to language and business students also online, at MS Teams meetings. Some of the revision classes for the language and business students' group were also held in an online mode, using MS Teams. During the tests and the examination, it was possible to contact the teaching staff in case there were any technical problems that would hamper the student submit the test or the examination tasks within the allocated time limit. In other words, it can be stated that the authors of the paper implemented the suggestions by Gregori et al. (2018) who concluded that the initial contact and the tutorials via emails and videoconferences as well as the availability of recommendations, guidelines, assignments and theoretical material, are very important for a successful result when acquiring a language by distance. Continuous assessment and the final assessment were also ensured as all

students had to take one online test and an online examination as well as submit some written assignments to the teaching staff to be checked and evaluated. Most of the training tasks, however, had to be checked by the students as they were provided with the answer keys to the assignments. Regarding the potential problem with identifying or verifying the test takers' identity mentioned in previous research, as well as the student academic dishonesty, it has to be admitted that the issue was only partly addressed. The students, whose test and examination were held on the Moodle platform, had to authorize to get access to the test, but there is no guarantee that they did not check some sources or asked for somebody's help while taking the online tests. However, each assignment was timed and that allows the authors consider that even if there were some cases of academic dishonesty, their impact on the overall students' test results was insignificant.

At the end of the course, the students were asked to participate in a survey (see Appendix 1 for the questionnaire) in order to find out their opinion about studying by distance and the usefulness of various study materials and assignments. The questionnaire was created by the authors of this paper, using Google forms, and was anonymous. The answer choices included all the possible ways of studying offered to the students during this distance learning period, thus also enabling the authors to conclude about the students' independent study skills. As the authors of this research were interested in the students' opinion on the benefits and drawbacks of studying by distance, half of the questions (4, 5, 6, 7, 13) were open-ended questions and the other half closed (8, 9, 10, 11, 12), with the first three being demographic questions. Questions 4 and 5 inquired about the students' overall attitude to studying by distance while questions 6, 9 and 10 were aimed at researching the students' approach to acquiring English grammar. Questions 7 and 8 were included to provide the possibility of comparing the students' opinion about their skills and approaches to studying.

Unfortunately, out of the fifty active students, at the end of the semester only 23 submitted their answers, i.e. 46 percent response rate. However, providing comments to the answers at such a rate was unusual in the authors' experience as all 23 respondents provided comments on why they had listed the particular benefits of distance learning, and 21 respondents did the same regarding the comments on the drawbacks of studying by distance, which allows the authors of the paper to consider this information valuable for further research.

RESULTS AND DISCUSSION

The students majoring in English philology comprised 57 per cent of the respondents, the other 43 per cent being those of language and business students, but, as the answers do not demonstrate any significant statistical differences, they will be analysed together. Among the respondents, 61 per cent were the first-year students, thus taking their second semester at university, 35 per cent

of the respondents were in their fourth semester, with the remaining 4 per cent representing students of the sixth semester, thus making it possible for the authors to conclude that they are experienced or somewhat experienced tertiary level students acquainted with the main ways and principles of university requirements and approaches to studies, including independent studies.

The students were asked to name at least three benefits and the main drawbacks of distance learning that could help to develop or prevent from developing the students' independent learning skills. The majority of them (17) mentioned the opportunity to plan their own time, thus manage to do both study and work or 'other daily activities', implementing the overall time management and prioritizing skills were named among the main benefits of this time as well. In fact, regarding the first reason, three students mentioned that it was easier to balance their studies with their other life activities during the studies by distance, partly also due to the fact that they did not have to travel to the University and, thus, time was freed for studies and activities not related to studies. As other benefits were also mentioned: (1) the possibility to study each topic at their own pace, not depending on what other students need or might consider the right pace; (2) the possibility to revise (or not to revise) some topic if and when needed; (3) the opportunity to receive a more detailed and individual feedback from the professor, 'which enables students to improve their written work'; (4) the opportunity to use MS Teams chat 'to consult my peers without disturbing the rest of the group during lectures'; (5) the possibility to apply their own study methods and choose the learning environment, (6) the opportunity to 'access information all day long'; (7) the 'unlimited access to online libraries, video materials, and encyclopedias that cannot be provided in class when studying'. According to the authors of the present paper, the latter comment rather indicates the insufficient use of digital resources and tools in face-to-face classrooms and homework assignments than to an advantage of studying by distance. At least it should not be the case.

Two students also mentioned that studying by distance, from home, is less stressful. One student indicated that this mode of studying allowed for broader networking possibilities while another student emphasized the lack of group work as a benefit. This leads to a conclusion that studying by distance and at an individual pace satisfy student needs better. Overall, the students stated that they felt they had improved their digital skills, including digital information management skills ('distance learning gives an opportunity to explore and master all types of digital tools, such as thesauri, mind mapping software and collocational dictionaries'), independent study skills, concentration skills (as there are many distractors at home), sense of responsibility, self-motivation and self-discipline. As it has been stated by several researchers (Trowler, V. and Trowler, P, 2010; Chang, C., Chang, C.-K. and Shi, 2016), learner motivation is very important, and the respondents admitted that studying English grammar by distance even allowed them to become more motivated. Unfortunately, as the survey was anonymous, it was not possible to analyze how the students'

level of English might have affected their choices as previous research also indicated that students with lower level of knowledge favour independent studies less.

In addition to acquiring English grammar, one student also mentioned that independent studying had taught ‘a lot about myself’ and ‘this newly gained knowledge has been useful in many areas of my life’. Another student wrote that ‘The lack of in-person communication might help to develop the ability to better express one’s opinion verbally (as there are no gestures, facial expressions, etc. to “guide” the conversation)’. This seems to be a completely different view at learning by distance as usually it is considered that communication skills, which require proper use of grammar, are better acquired in real face-to-face communication.

However, studying by distance also poses certain problems. They may be grouped as the ones referring to the acquisition process and were mentioned by at least 3 respondents, for example: (1) a small number of lectures online; (2) difficulty to understand the new material independently; (3) inability to ask questions directly when something is not clear; (4) limited access to the teaching staff; (5) insufficient feedback; (6) delayed feedback; (7) lack of materials; (8) technical problems (the Internet connection, problems with computers and/or other digital tools); (9) the digital skills of the teaching staff; and the ones related to the overall students’ study skills and competence such as (1) time management skills, which are an even more serious problem if the student is not particularly good at them, (2) inability to study on one’s own without any external assistance by the teaching staff.

The above is similar to the findings of Ekmekçi’s (2015) research that revealed that the students considered that they did not get enough feedback from their teachers, but they liked that they could choose the study time and place. The fact that some students mentioned lack of materials as a drawback while the availability of digital materials at any time and in many sources was mentioned as a benefit by other students makes the authors assume that students might lack the skill to search independently for additional materials.

Another drawback of distance learning that should not be left without attention is the mention of feeling lonely, which may affect the motivation to study. It is a psychological factor that needs to be addressed. It is the reason why pure distance learning, without live online classes (not just recorded video presentations) might not need to be practiced.

In order to find out whether the students find revision of the theoretical material and assignments appropriate to prepare for the grammar tests and examination when studying by distance, questions 6, 8, 9, 10 were asked, putting emphasis on how students prepared for the online test and examination. The results indicate that most of the students do practice tasks and check with the keys and the rules before tests (thirteen respondents selected this answer choice), and six students also read theoretical material, several times,

if needed, before the tests, which is an implementation of the recommendation in P. Cheng and Ding's study (2021) that emphasised the importance of revision in language acquisition. However, only 2 students searched for and used additional theoretical materials for self-study before tests. This leads to a conclusion that, although many students indicated that they had developed their independent study skills and they could use the benefit of distance learning that the study materials and additional materials are available on the internet, in fact, very few used this opportunity. The reasons might be observed in two comments provided by the students on the drawbacks of distance learning. The first one is: 'sometimes it's hard and time consuming to find the right materials for in-depth understanding of topics'. The second states: 'Freedom that distance learning provides hinders those who need external structure to be able to persevere and be productive. People often need a certain "box" to be able to break out of it and be creative'. Both comments are, in fact, related – students need structures, frameworks, provided materials even for additional studies, in other words, everything supplied for use and then they feel more comfortable and can study independently, which corresponds to Gregori et al.'s (2018) findings and approves that the authors' approach to providing as much material as possible in the e-studies platform Moodle was appropriate, however, not sufficient for some of the students. The analysis of all the answers provided by each respondent indicated that the students who stated that they needed more feedback and more guidance were also the ones who mentioned that they lacked face-to-face contact or at least online classes in which they could clarify the unclear issues and ask questions and get response immediately when the problem with understanding the material or the assignment occurred. However, a question arises whether very close guidance always allows students to prepare for their future careers in an agile environment, which has been governing our lives and studies for the last year, and flexibly adjust to it.

CONCLUSIONS AND RECOMMENDATIONS

The research findings approved those of previous research that, when acquiring language by distance, students appreciate the opportunity to study when and where they can because it allows them to combine their studies with work or, as they indicated themselves, with their other daily activities, thus allowing to balance their studies, work and life better, which is important for an overall mental health and prevents from dropping out of the course or the entire study programme. Therefore, this finding is important also for university administrators because high drop-out rates seem to be a problem in many tertiary institutions nowadays, especially during the corona virus pandemic.

The possibility to choose the study time and place may also increase the learners' motivation to do the assignments and study as they feel control over their time.

The students' opinion that they lacked professors' feedback, or it was insufficient, and that the teaching staff were not available when needed leads to a conclusion that there need to be ways how to provide more detailed feedback and possible answers to 'frequently asked questions' designed in the courses that are delivered by distance.

The opportunity to study by distance increases the students' motivation to learn, develops their independent study skills, as well as their digital competence. At the same time, the students' language level and their previous digital skills, including the digital information management skills, may impact not only their success with independent studies as such and in tests, but also on their motivation and willingness to study on their own.

The students' answers also indicated that when preparing for the test and the examination, they used the opportunity to revise the material by looking through the theoretical materials and redoing the assignments that had already been done once. It makes the authors conclude that such an opportunity needs to be actively communicated and reminded to the students.

The ability to practise and improve the students' time management and priority setting skills is an advantage of acquiring English grammar by distance, but at the same time the lack of these skills is also a factor that makes students look at studying by distance as a not preferred study mode.

Despite the small number of the survey respondents, it can be concluded that the research questions were answered and the results, although they cannot be generalised, indicate to tendencies in the students' opinion about the advantages and disadvantages of acquiring English grammar by distance and the usefulness of revision in order to prepare for online tests and examinations when studying by distance.

Therefore, to make the distance learning experience more appealing to students and more effective for language acquisition, the authors of the paper have arrived at the following recommendations:

1. If the entire study course is planned to be delivered by distance, the first class needs to be held online in order to ensure the initial contact. It is also advisable to record the first class and make it available to the students so that they can revisit it whenever needed.
2. Online classes need to be held also during the distance learning course, their number depending on the needs of the respective student group.
3. Student emails need to be checked and responded more frequently than just once in 24 hours.
4. It might be useful to consider recording answers to the most frequently asked questions about the course materials, so that students have the opportunity to check the answers as frequently as they wish and need.
5. Students should be offered individual and/or group online tutorials once a week in order to reduce anxiety of studying by distance.

However, to make more generalizable conclusions, the research needs to be continued to observe whether the same conclusions can be made with a larger number of students as well.

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APPENDIX 1 QUESTIONNAIRE

Dear Students

We are doing research on the ways of developing student independent learning skills.

Could you, please, fill in the questionnaire and provide comments where requested? the survey is anonymous, and the results will be considered only in a summarized form. Answering will not require you more than 5-8 minutes.

1. I am a student from
 - part time
 - full time
2. My study programme is
 - MLBS
 - English Philology
 - other
3. I study in
 - year 1
 - year 2
 - year 3
 - year 4

4. Name 3 main benefits of distance learning which could help to develop your independent learning skills

1...

2...

3...

Please comment your choice: _____

5. Name the main drawbacks of distance learning (if any) which could prevent developing your independent learning skills

_____ Please comment your choice: _____

6. My grammar test results are better if I (choose the most appropriate option(s) for you):

read theories a couple of times before tests

learn theories by heart before tests

do not read theories before tests

do only practice tasks before tests

do practice tasks and check with the keys before tests

do practice tasks and check with keys and the rules before tests

do not do practice tasks, but do tests, correct mistakes and then retake tests

do not do practice tasks, but do tests several times

find and use additional theoretical materials for self-study before tests

find and do additional tasks before tests

find and do additional self-tests before tests

7. My average mark in English grammar is

8-10

6-7

4-5

3 and less

8. Choose the best answer for the following statements

	fully agree	more agree than disagree	more disagree than agree	fully disagree
I am good at time managing				
I read and follow all teacher's messages sent to me and/or my group				
I read all handouts for each grammar class				

9. The tasks which I redo before the grammar test are
the easiest ones
all
the most difficult ones
none
10. I do the same tasks before the test
once
twice
more than once
11. Please, provide any other comments on your independent learning:

Thank you!

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TIME DEIXIS IN ENGINEERING DISCOURSE

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Abstract. Nowadays, it has become commonly accepted that the meaning of linguistic elements is interconnected with the context of their use. Deixis is one of the classical pragmatic phenomena that illustrates that context-dependence is inherent in language as meaning of deictic expressions cannot be constructed without the identification of the speech event where these expressions occurred. The present article discusses cases of time deixis in the context of engineering discourse. The goal of the research is to demonstrate how the deictic expression use in different genres of professional discourse impacts meaning construction. The study deals with the data obtained from scientific articles, encyclopaedia chapters and coursebooks. The findings indicate that temporal deictic expressions can be utilized both deictically and non-deictically and their frequency may depend on the genre within each professional discourse. Further research can be conducted to investigate the use of other categories of deictic expressions in engineering discourse.

Key words: time deixis, deictic expressions, pragmatic meaning, reference, engineering discourse

INTRODUCTION

In the recent decades, the phenomenon of the *semantics-pragmatics interface* has been one of the most debatable issues in the theoretical literature on pragmatics. The standard accepted account of meaning draws a distinction between ‘*what is said*’ (i.e. the semantic part of the meaning) and ‘*what is implied*’ (i.e. the pragmatic or contextual part of the meaning). Scholars (e.g. Recanati, 2004: 3; Evans, 2009: 5) refer to this account as *literalism*.

By emphasising the contrast between linguistic and extra-linguistic aspects of meaning, literalism highlights the existence of context-independent part of meaning. However, this stance is opposed by *contextualism* (e.g. Sperber and Wilson, 1995; Recanati, 2004; Evans, 2009). Borg (2012: 519) suggests that the underlining idea of contextualism is ‘that pragmatics can contribute to semantics even when such a contribution is not required by anything in the lexico-syntactic content of the sentence’.

Huang (2007: 242) concludes that ‘the boundary between them [semantics and pragmatics] is not easy to draw in a neat and systematic way’. The division of labour between these branches of linguistics depends on a scholar’s theoretical stance.

Whereas semantics operates with the notion of *sentence meaning*, pragmatics deals with *utterance meaning*. At the lexical level, *word meaning* or *lexical concept* can be applied to both domains of semantics and pragmatics. The previous research (Čerņevska, 2019: 4-8) discussed word (i.e. lexical concept) meaning ambiguity in mechanical engineering discourse. The study investigated the pragmatic processes of *lexical narrowing* and *lexical broadening*. Lexical narrowing refers to the instances of a word conveying a more specific meaning in the context than it encodes linguistically (Huang, 2012: 171-172). For example, the same word could have a narrower meaning as a technical term utilized in professional discourse than it would have in general vocabulary. On the other hand, lexical broadening deals with the cases of words acquiring a more general meaning in the context than is lexically encoded (ibid.: 171). It has been concluded that, while meaning ambiguity is frequent in the discourse under analysis, word meaning tends to narrow rather than broaden in the context of mechanical engineering discourse (Čerņevska, 2019: 8). The present study continues the discussion of the interconnectedness of linguistic and non-linguistic aspects of word meaning in relation to the concept of *deixis*.

Huang (2012: 87) defines deixis as ‘a phenomenon on the intersection of semantics and pragmatics [that] deals with features of the context of an utterance and how they are encoded in the language by lexical and grammatical means. This includes the identification of a specific speaker, addressee, time and place of an utterance’. Moreover, Levinson (1983: 54) states that deixis is ‘the single most obvious way in which the relationship between language and context is reflected in the structure of languages themselves’. *Deictic expressions* (i.e. *indexicals*) adjust their meaning to the context of use and cannot be fully comprehended without any knowledge of this context. Consequently, deixis has become an extensively debated issue among scholars.

Huang (2007: 237-241) outlines this debate by offering a comparative analysis of five different theoretical frameworks (Grice, 1989; Bach, 2004; Sperber and Wilson, 1995; Levinson, 2000; Recanati, 2004). The scholar (ibid.: 241) concludes that deixis can be viewed as part of ‘what is said’ or the semantic content of an utterance; as a *conversational implicature* (i.e. ‘part of the meaning [...] beyond “what is said”’ (Huang, 2012: 73)) or as part of the explicit content of an utterance that needs to be resolved pragmatically.

Levinson (2004: 97) also admits that the concept of deixis is one of the underresearched areas of pragmatics as there has been no agreement on the boundary between the semantic and pragmatic parts of its meaning.

The present paper focuses on one category of deixis, namely, *time* (i.e. *temporal*) *deixis* that links an utterance to the time period when the utterance is produced. The use of time deixis in the discourse produced within the domain

of engineering is analysed. Engineering discourse utilizes a significant amount of descriptions of sequence of events where the temporal aspect is crucial for a variety of activities such as a successful application of material processing techniques and others.

The goal of the study is to research the theoretical implications of the notion of deixis in relation to the semantics-pragmatics interface and to analyse the use of temporal deictic expressions in different genres of engineering discourse. It has been hypothesised that the genre impacts the frequency of deictic expression use and the pragmatic meaning construction of these linguistic elements.

Engineering discourse is underresearched from the pragmatic perspective; however, previous publications (e.g. Čerņevska, 2016, 2019) deal with other aspects of the pragmatic meaning construction in mechanical engineering discourse such as presuppositions and scalar implicatures.

The paper offers an analysis of the theoretical considerations on the concept of deixis and discusses professional discourse as a means of communication within a *discourse community* – a group of people who share texts and practices (Barton, 2007: 75-6; cited by Hyland, 2009: 35). The present research also focuses on the selected instances of time deixis in the discourse under analysis.

LITERATURE REVIEW

Deixis has always presented a challenge for semantic analysis as the interpretation of deictic expressions requires knowledge of the context of their use. The utterance cannot be assigned its *truth-value* (i.e. evaluated as ‘true’ or ‘false’) without identifying the referents of the deictic expressions.

Semantics operates with the notion of *sense*. There are various sense relations between words such as antonymy, synonymy, etc. Sense is usually opposed by *reference*, which can be defined as ‘a relation which holds between expressions and entities, properties or situations in the outside world’ (Lyons, 1981: 168). Thus, reference, similarly to deixis, is context-dependent.

The relationship between the concept of deixis and reference is not unanimously defined by different scholars. For instance, Ariel (2010: 149) implies that deixis is part of reference stating that ‘reference in general, and deixis in particular, have been considered classical pragmatic phenomena’. However, Lyons (1981: 180) notes that ‘reference can be deictic or non-deictic; and deixis does not necessarily involve reference’. Levinson (1983: 67) also discusses non-deictic usages of deictic expressions. The scholar states that non-deictic usage is ‘deictic terms being relativized to the text instead of to the situation of utterance’ (ibid.). In other words, the anaphoric use of such linguistic elements is defined as non-deictic.

This theoretical stance seems to emphasise the physical dimension of the context and to differentiate it from the linguistic context. Consequently,

it should be admitted that the same linguistic expressions can be used either as deixis or not, which, in its turn, suggests that the link between the linguistic structures and the concept of deixis depends on certain extra-linguistic factors. It can also be the case that particular expressions are both deictic and non-deictic in the same utterance (Archer, Aijmer and Wichmann, 2012: 27).

The phenomenon of deixis includes the notion of a *deictic centre*. Huang (2007: 135) lists three major categories of a deictic centre: the person who is speaking, the time of the utterance and the place of the utterance. The scholar adds (ibid.) that deixis is 'a self-centred phenomenon, its centre being typically I-here-now'. Archer, Aijmer and Wichmann (2012: 26) state that 'deixis grammaticalizes features of the speech event such as the (role/status of the) participants, the activities being talked about or referred to and the spacio-temporal context'. However, Sidnell (2009: 117) points out that the meaning of the deictic expressions is not necessarily calculated in relation to the speaker. It can be not only an ego-centric, but also a sociocentric phenomenon, which means that the speaker is able to understand their addressee's perspective and take it into consideration when producing an utterance. Mey (1993: 54) also states that 'an ego-centred organization of deixis [...] is not always and necessarily the case'. This shift of the deictic centre can be referred to as a *deictic projection* where the deictic centre shifts from the speaker to the addressee (Huang, 2007: 135). Therefore, the meaning of deictic expressions depends on the focus of the speaker.

There are five main categories of deixis; the first three correlate with three main aspects of a deictic centre – *person deixis* (who the speaker is), *time deixis* (when the utterance is produced) and *space deixis* (where the utterance is produced). Besides, scholars (following Levinson, 1983: 85-94) define two additional categories – *discourse deixis* (i.e. *text deixis* – a reference to the text within which the utterance containing this reference occurs (ibid.: 62)) and *social deixis* (i.e. linguistic elements that encode the 'social relationship between the speaker and addressee' or other referents (ibid.: 63)). Whereas all these categories can be analysed separately, the focus of the present study is on temporal (i.e. time) deixis and reference.

Thus, an utterance occurs at a certain point in time which can be regarded as the temporal dimension of the deictic centre. The first complication arises from the fact that the deictic centre can be projected from the speaker to the addressee, and, in this case, the referent of the deictic expressions is modified as well. Levinson (1983: 73) differentiates between the concepts *coding time* (CT) and *receiving time* (RT) of an utterance. If the deictic centre is not projected, one can assume *deictic simultaneity*. Otherwise, CT and RT will differ. The second issue is concerned with time deixis as being referred to the entire span of the particular time period (e.g. today) or a point within this span (ibid.: 74-75; Huang, 2007: 144-145).

Time deixis can be grammaticalized in a language via deictic adverbs of time ('now' and 'then'), deictic calendrical unit terms ('today', 'tomorrow', 'yesterday') and a grammatical category of tense (ibid.: 145-149). Moreover,

deictic components like ‘this’, ‘next’ and ‘last’ can collocate with non-deictic components such as days of the week or names of months (Huang, 2007: 146). Besides, the use of such words as ‘today’ or ‘tomorrow’ has ‘priority over the use of calendrical terms for the relevant days’ (ibid.: 145), which indicates the possibility of linguistic scalarity.

While it has been mentioned that reference and deixis are not applied interchangeably as deixis can be used both in a narrower or broader sense (Lyons, 1981: 180), L. de Saussure (2012: 423) defines *temporal reference* as ‘some moment or interval of time where the situation is holding’, which roughly corresponds to the temporal dimension of the deictic centre of an utterance. The scholar (ibid.) emphasises that many utterances remain ambiguous in spite of the existence of the grammatical category of tense. This ambiguity is related to the fact that tense systems of particular languages ‘represent lots of different temporal relations’ (ibid.: 424). Levinson (2004: 115) also states that ‘the interpretation of tenses often involves implicatures’. In other words, the grammatical realization of time via the system of tenses in a language is not sufficient to establish the referent in the context as it also implies the subjective interpretation of an utterance based on background knowledge of the affairs in the world. When there is a clash between the grammatical representation of an utterance and the content of the utterance, the interpretation is affected by it. It should be noted that the present study excludes the discussion of tenses, although they can be interpreted in ‘purely deictic and strictly temporal’ (Levinson, 1983: 77) terms.

Ariel (2010: 204) states that there are two types of information that are encoded by referring expressions – *conceptual* and *procedural* information. The scholar (ibid.) suggests that conceptual information in the case of referring expressions is the ‘instructions on how to retrieve the representation of the intended referent from the context’. Thus, ‘tomorrow’ is ‘the next day for the speaker’. On the other hand, procedural information discusses ‘how accessible the representation of the retrieved referent is for the addressee according to the speaker’s best estimate’ (ibid.).

Moreover, the encoded part of meaning (both conceptual and procedural) is not sufficient for interpreting an utterance and the gap between the encoded and the speaker’s meaning should be ‘filled in by inferencing’ (ibid.: 151).

Consequently, deixis can be approached differently depending on the theoretical stance of the scholar. First, instances of deictic and non-deictic use of deictic expressions can be separated. It can be assumed that if the referent of an expression can be identified based on the preceding linguistic discourse, the expression is applied non-deictically (i.e. anaphorically). This view suggests that the context can be described linguistically and, thus, does not have to require the pragmatic component for meaning construction. Another theoretical perspective emphasises that, whereas certain aspects of meaning are encoded at the linguistic level, there exists a gap between the linguistic level of discourse and the enriched meaning that requires inferential processing.

The present study combines these theoretical perspectives as it distinguishes between deictic and non-deictic use of time deixis and attempts to identify the gap between the linguistic form of deictic expressions and their contextual meaning in professional discourse.

Hyland (2009: 8-18) discusses two approaches to text-oriented research. The scholar states that texts can be viewed as *objects* (i.e. as being independent of the context of use) or as *discourse* (i.e. the language used for communication in order 'to achieve purposes in particular situations') (ibid.: 8, 12). Van Dijk (2011: 4) also emphasises that being contextually situated is one of the discourse properties. Besides, discourse is viewed as a communicative event which goal is 'the expression and communication of beliefs among language users' (ibid.) Due to its interactive nature, discourse implies the participation of both the writer and the reader in the meaning construction process (Hyland, 2009: 44-45). The role of the audience in writing adds 'a social dimension to writing research' (ibid.: 8) and allows to approach the concept of discourse as *social interaction* (Van Dijk, 2011: 3). Thus, it can be argued that the writer needs to take the intended audience into account when producing discourse.

The communicative goal of discourse depends not only on the field, but also on the genre. Swales (1990: 58; cited by Hyon, 2008: 12) defines genre as 'a class of communicative events, the members of which share some set of communicative purposes. These purposes are recognized by the expert members of the parent discourse community [...]'. Hyland (2009: 15) underlines that each genre differs from other genres; it 'has a specific purpose, an overall structure, specific linguistic features, and is shared by members of the culture'.

Consequently, deictic expressions can be comprehended at three levels. First, an expression contains conceptual information which can also be viewed as the semantic part of the meaning. For instance, 'now' refers to the current situation at the moment of the utterance production. This information can be retrieved by any reader who possesses the linguistic competence. Then, the context referred to by a deictic expression can be identified using common background knowledge. For instance, if the discourse discusses the increase of the pace of online communication in relation to 'now', most Internet users would be able to identify an approximate time period as they can construct the meaning of 'now' based on their Internet usage experience. Finally, a more precise identification of the time span can be available to those readers who possess professional knowledge in the field of engineering. This could refer to the discussion of the technical procedures less familiar to the general public.

Sperber and Wilson (1995: 39-46) introduce the concept of *mutual manifestness*. The scholars (ibid.: 15-21) argue that the mutual-knowledge hypothesis is implausible as two people could never share exactly the same knowledge. Consequently, the professional knowledge of two representatives of the same discourse community (e.g. engineers) does not necessarily overlap. However, they share a larger *cognitive environment*, since they have acquired or

are acquiring a profound knowledge of a professional field. Consequently, this would increase their abilities to successfully communicate within a discourse community in comparison with non-professional readers of engineering discourse.

METHODS

At the empirical level, the study is approached from the qualitative perspective. Three corpora of approximately 50,000 words each have been selected for the analysis. The discourse is represented by different genres (coursebooks, scientific articles and an encyclopaedia) in the field of engineering. The material selection criteria have been justified by the author's goal to investigate the difference in the use of time deixis in different genres within one area of professional discourse.

Whereas the coursebooks under analysis are intended for engineering students in general, the study analyses the chapters that refer to four main areas that can be applied to mechanical engineering, i.e. computer-aided design (CAD), material technology, machining and computer numerical control systems (CNC) and health and safety regulations at a manufacturing plant. The Encyclopaedia chapters included in the corpus deal with the discussion of occupational health services, iron and steel, metal processing and metal working industry and woodworking. The scientific articles have been selected from the Journal of Mechanical Engineering and also focus on this specific field of engineering.

The research is designed as a case study. It employs the *purposeful sampling paradigm* (Perry, 2011: 65). The paradigm purpose is 'in-depth information gathering' (ibid.: 65) and it concerns 'the unique characteristics of the sample itself' (ibid.: 57). *Convenience sampling* strategy (ibid.: 58) has been applied as the analysed discourse was readily available. Besides, *stratified purposeful sampling* (i.e. a few cases from each strata selection (ibid.: 59)) strategy has been added in order to ensure the external validity of the research.

The research method is discourse analysis. Following Roziņa (2013: 16-17), the present study focuses on the language use 'in professional settings with the emphasis on communication as a social action' since communication is a discourse property (Van Dijk, 2011: 3-5) and genre can be viewed as a communicative event (Swales, 1990: 58; cited by Hyon, 2008: 12). Whereas it can be argued that content analysis can be applied within a discourse analytical framework (Hardy, Harley and Philips, 2004: 20-21), discourse analysis 'highlights the precarious nature of meaning and focuses on exploring its shifting and contested nature' (ibid.: 20) the present study emphasises the role of context in meaning construction. The phenomenon of deixis is viewed as pragmatic in nature which implies the shift of meaning in the context of use.

The research tool sketchengine.org has been applied in order to research the frequency of different deictic adverb of time use. First, the study has been approached from the semantic perspective and the words are counted based on their linguistic forms. Then it has been established if the adverbs are used deictically, i.e. if the extra-linguistic context is necessary for identifying the referent. Finally, the study has attempted to identify the time span referred to by the selected deictic expressions and discussed if professional knowledge of engineering is essential for constructing the meaning of these deictic expressions.

RESULTS AND DISCUSSION

The present discussion comprises three subchapters that deal with different linguistic realization of time deixis in discourse.

1 DEICTIC ADVERBS OF TIME – ‘NOW’ AND ‘THEN’

Deictic adverbs of time are represented by the words ‘now’ and ‘then’ that indicate the proximity of the time referred to and the deictic centre of an utterance. The deictic centre can be projected, which also imposes a challenge on identifying the referent of a deictic expression.

Table 1.1 indicates that the use of ‘now’ is considerably less frequent than the use of its counterpart ‘then’. However, these findings only indicate the use of the specific linguistic forms that can be applied deictically or non-deictically in the discourse under analysis.

Table 1.1 The use of deictic adverbs of time in engineering discourse

Deictic adverbs	Scientific articles	Encyclopaedia	Coursebooks
Now	3	4	11
Then	28	58	58

For instance, the word ‘now’ linguistically means that the time referred to is concurrent with the time of the utterance. This part of meaning is supposed to remain stable despite the context of use. Following Ariel (2010: 204), it can be defined as conceptual information encoded in deictic expressions or instruction on how to identify the referent. However, ‘now’ can be stretched from a single moment to a quite prolonged period of time, which depends both on the speech act participants’ subjective interpretation of time and on the events or states of affairs, to which ‘now’ can be attributed. For example, ‘now’ in the context of a historical period can last for a few decades or even longer, whereas ‘now’ in the context of everyday situations can last for a few minutes or even less. Thus, it can be argued that not only the time of the utterance, but also the discourse characteristics impact the pragmatic meaning of ‘now’. This challenges the idea of the semantic meaning existing outside a context.

Although coursebooks present more instances of the use of ‘now’, it can be argued that all three analysed genres of engineering discourse contain a limited amount of such examples. Italics are added for emphasis in all of the selected samples.

[1] ‘Thirteen AMT out of twenty reduce staff cost, but the significant reduction is in using software for production planning and scheduling which was done manually before and is *now* replaced by software.’ (articles)

[2] ‘As the complexity of the machinery increases, the requirements for lubricants and metal process oils become more stringent. Lubricating oils *now* range from clear, very thin oils used to lubricate delicate instruments, to thick, tar-like oils used on large gears such as those which turn steel mills.’ (encyclopaedia)

[3] ‘Thanks to the Internet it is *now* possible for people all over the world to communicate with one another in a fast and cheap way.’ (coursebooks)

[4] ‘We *now* have a full set of working drawings for the main ski lift (attached).’ (coursebooks)

[5] ‘Biotechnology / genetic engineering methods – this technology is really in its infant stage, so the negative relationships to profits for *now* are understandable.’ (articles)

Although the use of ‘now’ in the selected utterances seems quite similar, it would be interesting to indicate the differences.

First, the impact of the linguistic context on the meaning of ‘now’ is identified. It can be observed that utterances [1], [2] and [5] contain other linguistic elements that presuppose the contrast between the present time period and others. Utterance [1] contains an adverb ‘before’, which literally compares two different periods in the history of machinery development. Moreover, the use of the verb ‘to replace’ also indicates the change. The verbs ‘to increase’ and ‘to become’ in the sentence that precedes the use of ‘now’ in example [2] linguistically presuppose the change of state; thus, also highlighting the contrast between ‘now’ and ‘earlier’. Utterance [5] contains the expression ‘in its infant stage’ that also linguistically indicates the possible development of biotechnology. However, unlike utterances [1]-[4], this instance contrasts the present period with the future rather than the past.

Utterances [3] and [4] do not contain an explicit indication to the past or the future that would be readily available for general public understanding. A reader’s general knowledge about the development of the Internet suggests that online communication is constantly becoming faster and cheaper. Thus, utterance [3] seems to apply to any point of time since the invention of the Internet and it would be problematic to identify the exact time period referred to by ‘now’ without the immediate context of an utterance.

Utterance [4] also seems to lack the contrast between ‘now’ and other time periods. Besides, it represents a line from a dialogue between engineers in the coursebook where the participants of the speech event discuss their work on a project. In this example, ‘now’ can refer either to a point of time or to a time period. Moreover, the reader is not able to define the exact temporal dimension of the utterance context as the dialogue could have occurred at any time, which is similar to the use of ‘now’ in utterance [3]. However, a technical term ‘working drawing’ can be contrasted with ‘a preliminary drawing’ that would refer to an earlier stage of the product design development process. As a result, a reader who possesses the professional knowledge about this procedure will infer that the product design development process might have been completed. The meaning is constructed at the linguistic level, but it might not be understood fully by a general reader.

The second step is to analyse the impact of the extra-linguistic factors and professional knowledge in engineering on the meaning construction of the adverb ‘now’ in the selected utterances.

It can be argued that the meaning of ‘now’ in utterances [1]–[5] can be comprehended even by non-professionals in the field. The reader can rely both on the linguistic information and the background knowledge of the world. The text itself states that certain procedures have been altered. For instance, production planning is now done by software [1] and the requirements for lubricants have increased [2].

However, the encoded part of meaning could be enriched by the background knowledge of the world to identify the time period more precisely. Thus, the deictic adverb of time ‘now’ has its semantic and pragmatic aspects of meaning that contribute to the meaning of an utterance.

Whereas the use of ‘now’ covers the time period as contrasted with ‘earlier’ or ‘later’, the linguistic part of the meaning does not indicate when the period that referred to by ‘now’ starts or ends. Thus, the background knowledge is required to identify the period. However, the professional expertise in the field of engineering does not seem necessary in order to retrieve this part of meaning.

The aim of the coursebook is not only to provide information, but also to practice the communication skills and improve the linguistic competence of a language learner who specialises in engineering.

Consequently, the examples encode different meaning of deictic expressions. The adverb ‘now’ in utterance [4] refers to a shorter time span than in utterances [1]–[3] and [5] as it deals with a working situation which is being resolved at the moment. The genre of coursebooks allows the author to introduce the context where ‘now’ is applied in a short dialogue as in the case of utterance [4]. Some examples contain the extracts from professional texts used for reading assignments, where ‘now’ is utilized similarly to its application in the encyclopaedia and scientific articles. The selected instances of the use of ‘now’ in the discourse are compared in Table 1.2.

Table 1.2 The comparative analysis of the use of 'now' in the selected utterances

Utterance	The impact of the utterance linguistic content on the meaning construction of 'now'	The impact of the readers' background knowledge on the meaning construction of 'now'
1. (articles)	The use of 'before' and 'to replace'	Linguistic context and general knowledge of the world are sufficient to infer the contrast between 'now' and 'before' in relation to the software development. Professional expertise could be beneficial for identifying a more precise time span – are these years? Decades?
2. (encyclopaedia)	The use of 'to increase' and 'to become'	Similar to utterance [1] the utterance describes metal processing procedure details as well
3. (coursebooks)	No explicit comparison with the past or the future	General knowledge of the world suggests that the utterance can refer to any time period; more information about the dates is required to identify a more specific span – both for engineers and non-professional readers
4. (coursebooks)	The use of 'now' between the subject and the verb might emphasise the contrast between 'now' and 'before'. However, the word order might be impacted by the example being intended to modulate spoken discourse. The knowledge of the term 'working drawing' can help to infer the contrast with the previous stages of design development process	The utterance can refer to any period of time as expected from the genre of an ESP textbook modulating dialogues; professional knowledge can only identify the stage of the product design development process based on the knowledge of terminology
5. (articles)	The expression 'in its infant stage' can linguistically presuppose the future development of biotechnology	Similar to utterances [1] and [2]; however, 'now' is contrasted with the future rather than the past

The less frequent use of 'now' in comparison with 'then' can be accounted for non-deictic use of 'then' in the discourse. No instances of deictic use of the adverb 'then' in the discourse can be reported. The description of material processing is divided into stages that are characteristic of this process, and the adverb 'then' is often utilized in order to present the procedure clearly. The previous steps, before 'then' are usually reported in the same or previous utterances, which means that the linguistic context is sufficient for identifying the referent and, therefore, 'then' is applied non-deictically. It also does not require a significant cognitive effort in order to establish the reference. Consequently, the example can be defined as the anaphoric use of 'then'. The adverb usually describes the sequence of actions and does not indicate any lack of proximity to the speaker.

[6] 'Resin sand is injected into a metal pattern (the core box). The pattern is *then* heated – by direct natural gas fires in the hot box process or by other means for shell cores and moulding.' (encyclopaedia)

[7] 'Complete the texts with the words in the box. *Then* listen and check.' (coursebooks)

Utterances [6] and [7] demonstrate that the adverb 'then' is applied similarly both in the description of a metal processing technique in the encyclopaedia and in the instructions for the exercise in the coursebook. Thus, the meaning of 'then' does not vary depending on the genre as both examples utilize 'then' to explain a process. However, there is a pragmatic component which has not been fully encoded in the utterances. It requires background knowledge to understand the time gap the adverb 'then' refers to. Utterance [7] usually implies that the listening part of an exercise starts instantly after the texts have been completed with the words. However, to infer this, some background knowledge of the language learning process is required. Utterance [6] requires the knowledge of the field of engineering and metal processing, in particular for the reader to be able to infer the time period between injecting resin sand into a metal pattern and heating the pattern. Thus, the pragmatic component of the adverb 'then' in these examples does not alter because of the genre or the topic of the discourse.

2 DEICTIC CALENDRIAL TERMS – 'TODAY', 'YESTERDAY' AND 'TOMORROW'

While adverbs 'now' and 'then' encode the distance between the time of an utterance and the referent of the deictic expressions and can last for an unidentified period of time, deictic calendrical terms additionally indicate the approximate time span as it is commonly accepted that each day consists of 24 hours. However, the context of use can extend the time period referred to by these words.

Table 2 The use of deictic calendrical terms in engineering discourse

Deictic calendrical terms	Scientific articles	Encyclopaedia	Coursebooks
today	3	3	6
yesterday	0	0	1
tomorrow	0	0	0

Table 2 illustrates the frequency of deictic calendrical terms use in the discourse under analysis. It demonstrates that there are a few instances of the adverb ‘today’ in all analysed genres, whereas the word ‘yesterday’ appears only once and the word ‘tomorrow’ does not appear in the discourse at all.

[8] ‘*Today*, many market environments are characterised by the rising costs of raw materials, technological and economic uncertainty and decreasing profit margins.’ (articles)

[9] ‘Drop hammer forging once comprised about two-thirds of all forging done in the United States, but is less common *today*.’ (encyclopaedia)

[10] ‘Wind energy is one of the cheapest renewable technologies available *today*.’ (coursebooks)

The adverb ‘today’ is applied in the same meaning as ‘now’ describing the contemporary time period and stressing the rapid development of technology in the sector. In utterances [8]–[10], ‘today’ can be opposed to the adverb ‘earlier’ or ‘before’ and describes a time period that is proximal both to the writer and the reader as the discourse was written quite recently. However, both ‘now’ and ‘today’ can emphasise the contrast with either preceding or following time periods, and each instance should be analysed in the context of their use.

It should be noted that there are no examples of utterances where ‘today’ would refer to a particular day when an utterance is produced. It can be observed that the pragmatic process of *lexical broadening* is applied to the use of ‘now’ and ‘today’ in the engineering discourse. This could demonstrate that the use of temporal deixis in the engineering discourse can be distinguished from the use of lexical concepts analysed previously (Čerņevska, 2019). The previous research findings (*ibid.*) demonstrated that the pragmatic process of lexical narrowing is typical in relation to lexical concept adjustment in mechanical engineering discourse. Thus, it could be stated that the meaning of temporal deixis undergoes a different pragmatic process than the meaning of other non-deictic lexical concepts in the discourse under analysis. This could be accounted for the fact that identifying a time period, unlike the comprehension of technical terms, does not require profound professional knowledge of the engineering field. The professional knowledge only assists in identifying the referred time span more precisely.

Interestingly, the coursebooks apply the adverb ‘today’ in order to describe a longer time period and do not mean the actual day where the discourse takes place, although this could be possible. In the context of coursebooks, such use could be expected as some of the utterances simulate the real-time conversation between the participants of the speech event.

Chafe (1982: 45) states that ‘the detached quality of written language is [...] to distance the language from specific concrete states and events’, whereas spoken discourse can be characterized by the audience ‘involvement’ (ibid.). Whereas coursebooks represent written discourse, they also aim to teach speaking skills and, thus, can contain elements characteristic of spoken discourse. One example from the analysed coursebooks is the use of the word ‘yesterday’ applied in reference to ‘the day before the utterance was produced’.

[11] ‘We had our first design meeting with the airport authority and the architect *yesterday*.’ (coursebooks)

The adverb ‘yesterday’ is applied deictically as it is necessary to know the context of the utterance to identify the exact time span. Moreover, the adverb can define both the point of time within the time period and the whole time span. The reader’s background knowledge suggests that meetings do not last for the whole day; thus, ‘yesterday’ probably means ‘a time period within the day before the utterance’. However, it might be implied that the meeting lasted for the whole day. Thus, the identification of the time period relies both on the encoded information and the pragmatic part of meaning.

3 COMPLEX DEICTIC ADVERBS

Complex deictic adverbs consist of a deictic component (this, next, last) and a non-deictic component (month, Monday, year) (Huang, 2007: 146).

Table 3 the use of complex deictic adverbs in engineering discourse

Complex deictic adverbs	Scientific articles	Encyclopaedia	Coursebooks
This + non-deictic component of time	0	1	2
Last + non-deictic component of time	1	2	3
Next + non-deictic component of time	0	0	2

Table 3 demonstrates that complex deictic adverbs are not extensively represented in the discourse.

[12] ‘However, much of the literature regarding neurological effects in such workers derives from the presumption that aluminium absorption results in human neurotoxicity. Accordingly, until such

associations are more reproducibly demonstrable, the connection between aluminium and occupational neurotoxicity must be considered speculative *at this time*.' (encyclopaedia)

[13] 'Remember that people *at this time* are sceptical about the technology.' (coursebooks)

[14] '*At this point*, these are initial ideas based on the client's suggestions and the approximate dimension specified in the design brief.' (coursebooks)

Although the pronoun 'this' is utilized in the discourse rather frequently, there have been observed only three instances of it being applied in relation to the temporal aspect of an utterance. Interestingly, the occurrences of such complex adverbs do not include reference to a particular month or year. On the contrary, it should be admitted that the expression 'at this time' roughly corresponds to the use of the adverbs 'now' and 'today' in the discourse. Moreover, the expression 'at this point' can be understood figuratively, where the temporal aspect of an utterance is represented as a location or a spacial dimension of the context.

Utterance [12] utilizes the expression 'at this time' to indicate a longer time period, which can be inferred both from the previous linguistic context and the reader's background knowledge of the world. Since it refers to the theoretical literature on neurotoxicity, it can be assumed that the empirical studies have been conducted to prove the link between aluminium and occupational neurotoxicity. On the one hand, this can be assumed by any reader who has experience in academic work and publications; on the other hand, the more exact time period can be identified only by experts in this field as they are aware of the time required to conduct the research and produce tangible results.

The time period in utterance [13] may be identified more precisely once the technology mentioned in the utterance has a more specific referent. Then a reader with the knowledge of this technology could make more educated assumptions about people's reaction to it. Utterance [14] represents an extract from a description of an engineering design process, and 'at this point' could refer to a particular step within this process. Thus, it is not evident that the expression is applied deictically as the linguistic context could be sufficient to understand which point of time is referred to.

The meaning of the complex deictic adverbs that contain the components 'last' and 'next' can be constructed if the time of the utterance production is established.

[15] 'Within the *last decade* the industry has tended to either not replace or to modify existent Soderberg type reduction facilities as a consequence of the demonstrated carcinogenic hazard they present.' (encyclopaedia)

[16] 'These may be accompanied by nausea and headache and, some 10 to 12 hours after the exposure, chills and fever which may be quite severe. *These last several hours* are followed by sweating, sleep and often by polyuria and diarrhoea.' (encyclopaedia)

[17] 'Automation has had a great impact on industries *over the last century*, changing the world economy from industrial jobs to service jobs.' (coursebooks)

[18] 'Let me think ... It must have been *last year, in June*, when the car wouldn't...' (coursebooks)

[19] 'Actually, I'm quite busy at the moment, Mrs Farrell, so I could give it back to you *next Friday*. Yes, it'd be perfect, because we're leaving on Sunday. I'll call you on Tuesday for a confirmation then.' (coursebooks)

Utterances [15]–[19] demonstrate differences in meaning of the deictic expressions. For instance, the expressions 'the last decade' and 'over the last century' can be assigned their meaning only if the time of the utterances [15] and [17] is identified. Provided that the sources of the utterances are acknowledged and the time when they are produced can be identified, the meaning of the expressions can be constructed as well. Utterance [16] contains the reference to the immediate linguistic context and 'the last hours' do not require a reference to a specific point of time. Rather, the expression is applied anaphorically and, therefore, non-deictically.

Examples [18] and [19] from the coursebooks deal with the structure of a communicative situation, where the expressions 'last year' and 'next Friday' do not require the referent identification and, indeed, only their encoded part of meaning can be interpreted by the reader. The conceptual information suggests that 'last year' refers to the previous year from the perspective of the speaker and 'next Friday' refers to a Friday in the future. It has been discussed (Huang, 2007: 147) that the use of terms for days of the week is pre-empted by the use of such deictic calendrical terms as 'today', 'yesterday' and 'tomorrow'. Thus, if the expression were 'this Friday' or 'on Friday', it could be assumed that the utterance did not occur on a Thursday. However, 'next Friday' does not usually imply this as it usually refers to the Friday next week. Produced on a Saturday or a Sunday, the expression might become ambiguous as it would not be evident how to identify the time span of 'next week'. Besides, as it is discussed in literature (Huang, 2007: 146; Levinson, 1983), the names of the days of the week also have deictic aspects of meaning as they form a scale with such adverbs as 'today' or 'tomorrow'. In other words, if an utterance is made on Thursday, then 'next Friday' most likely means the Friday of the next week, because the speaker would have used 'tomorrow' otherwise. However, these considerations are not relevant to utterance [19] as the time is not important for the reader.

In the current case, the reader cannot identify the time of utterance [19] and, thus, the expression 'next Friday' remains ambiguous. However, the analysis

of the following discourse suggests that ‘Sunday’ should be understood as the Sunday that follows ‘next Friday’ and the Tuesday that precedes ‘next Friday’.

Utterance [19] seems to represent a line from a dialogue between a professional and a client. The deictic expression refers to ‘next Friday’, but the exact deictic centre i.e. when the utterance was made is not known as the purpose of the utterance is to demonstrate the language use in the professional setting, not to make an actual reference to the specific time period. This means that ‘next Friday’, in fact, does not mean any particular Friday, and it is not understood by the reader as referring to a particular day. The reader does not assign meaning to this deictic expression as the context already states that the exact date is not important.

This fact presents a notable difference between the encyclopaedia (and scientific articles) and coursebooks. In the first two genres the time of the utterance is very significant as the deictic expressions of time have meaning only in this context. For instance, such expressions as ‘last decade’ or ‘in the last three years’ that occur in these corpora make sense only if the reader is aware of the year when the text was written. In case the reader is going to read this text in, for example, a hundred years, he or she will understand that ‘last decade’ refers to the decade before the text was written. Thus, the meaning of the deictic expression of time can be inferred in case the deictic centre is known, but the reader can be far from this centre without losing the ability to identify the meaning.

Consequently, the meaning of a deictic expression of time can be identified if the utterance is produced in the authentic circumstances. In other cases, for instance, in a coursebook where the discourse has been constructed in order to enhance the linguistic competence rather than share professional knowledge, the deictic expression of time does not require assigning the meaning in the real-world situation.

CONCLUSIONS

The study demonstrates that deixis is a complex phenomenon that is discussed in relation to the semantics-pragmatics interface and comprises both linguistic and extralinguistic aspects of meaning. It should be noted that there can be deictic and non-deictic usage of deixis, which presents an additional analytical challenge.

The research results indicate that the use of time deixis in the selected corpora is rather limited, which can be accounted for the fact that deictic expressions are prone to be lexically broadened, which could present difficulties when constructing their meaning in the context of engineering. Certainly, the linguistic meaning ambiguity in the context is inevitable and is impacted by the area of professional discourse and the analysed genres that constitute a communicative event. However, previous findings (Čerņevska, 2019) demonstrated that other lexical concepts tend to narrow their meaning in the engineering discourse (e.g. when used in a technical sense), whereas temporal deixis is utilized in a broader

sense than is linguistically encoded. It is probable that the field of the analysed discourse would not benefit from the ambiguity that could occur if more time deictic expressions were applied.

Whereas the genre of discourse impacts the frequency of temporal deictic expression use, the instances of such examples are so limited that the hypothesis cannot be proved. Rather, the findings illustrate that the pragmatic meaning of temporal deictic expressions may vary depending on the genre. For instance, the aim of the coursebooks is to enhance linguistic competence and, thus, certain time deictic expressions are utilized in such communicative situations as dialogues, which permits certain flexibility of meaning of such adverbs as 'today', 'last Friday', etc. The reference to the exact time period might be less significant as it seems that the created dialogues in ESP coursebooks aim to focus on the linguistic part of these deictic expressions. On the other hand, scientific articles and encyclopaedias aim to increase the readers' general knowledge of the field of engineering and, thus, the referents of time deixis utilized in these genres should be constructed precisely.

The most common use of time deixis is the reference to the time span when an utterance is produced, such as 'now' and 'today'. However, the analysed instances demonstrate a rather loose or broad utilization of these adverbs in the context of engineering discourse.

The analysis demonstrates that meaning construction of these linguistic expressions depends both on the background knowledge available to a general reader and on the professional knowledge that the intended audience of the discourse should possess.

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TEXTS ANALYSED

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LANGUAGE AS A VALUE IN A PRAGMATIC WORLD: GLOBAL AND NATIONAL APPROACH

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Abstract. The article deals with the perception of language and languages in the economy-oriented contemporary world and its specific features in such language-centered countries as Latvia. Two main levels could be discussed concerning the ‘intellectual’, ‘symbolic’ and practical treatment of language: a global (supra-national) and a national one. In majority of countries special laws have been adopted or national level programs have been enacted in order to protect the most significant elements of respective national identities – folklore, traditional ways of life, beliefs and languages in particular. At the beginning of the 21st century, economic and political goals of the European Union have been associated with the ideas of European culture and European identity. At the same time, the popularization of the languages, histories, and traditions of the member states have also been emphasized. The Republic of Latvia belongs to the countries where the diversity of thoughts and viewpoints on language are ever present and intense in both the political debates and even in many informal conversations. The paper gives an insight in Latvian language policy against the background of global and European sociolinguistic processes and wide usage of so-called international languages, English in particular.

Key words: multilingualism, identity, language policy, international languages, official languages

VALUES, IDENTITY, LANGUAGE

‘Values’ are among the key concepts used in humanities and social sciences during the last decades, and the problem of finding appropriate definition for this term is a long-lasting one, too. The Latvian philosopher Maija Kūle points out that ‘values are culturally historically determined, objective as they are compatible with the trend of a particular period, they are given labels which are grasped by public opinion, they are in tune with a cultural historic paradigm and are reflected in national identity’ (Kūle, 2018: 434).

This definition involves one more widely used unanimously treated concept – the ‘national identity’. Due to vagueness and overexploitation of this term in both

academic and public discourse, a certain negativism towards it has sometimes been observed in the scholarly community: either rejecting the notion as such or avoiding the respective terminology. Despite being aware of the fact, the term *national identity* has been used with a high frequency and this concept laid the background for several programmatic documents and legal acts at the global, regional and national levels. The American sociologist Carol L. Schmid showing that language is more than a means of communication underlined that

national identity refers to a sense of belonging to – but not necessarily reinforced by – a common culture, customs, language, heritage, and political institutions. At the same time national identity consists of a sense of distinctiveness from other people who may or may not share certain of these characteristics. (Schmid, 2001: 10)

During the previous two decades anthropologists, sociologists and philosophers focused their attention on various elements of a collective identity while sociolinguists dealt with the sociolinguistic aspects of the identity. The idea about any indisputable links between national identity, values and a language have been developed in tens of monographs and hundreds of research contributions (e.g. Joseph, 2004; Bucholtz and Hall, 2004; Edwards, 2009; Evans, 2014, 2018; Ehala et al., 2018). Analyses of the sociolinguistic aspects of national identity imply the task to single out and highlight those identity components that are of a linguistic nature. Sociolinguistics allows us to view the situation of some specific language as part of community identity in the broader context of the evolution of global academic thinking.

LANGUAGE AS VALUE AT THE SUPRANATIONAL LEVEL

Alongside with solving common problems that apply to the whole mankind, the identity preservation of each individual country or each ethnos is becoming even more significant. Globalization does not mean homogeneousness, it means mutual enrichment and linguistic diversity:

Linguistic diversity is part and parcel of the diversity of life in nature and culture. Any loss in linguistic diversity is a loss in the vitality and resilience of the whole web of life. Every time a language disappears, along with the cultural traditions and cultural knowledge it conveys, it's a piece of the planet's living fabric that gets torn off, leaving all of the living world more fragile, more vulnerable, and with fewer options for the future. (Online 1)

However, the globalization processes determine the success of the efforts to protect languages, even for the mid-sized ones. The researchers involved in a multidisciplinary research project *Mobility and inclusion in multilingual Europe* (2014–2018) recognized:

A fragmented approach to the management of linguistic diversity is increasingly unsatisfactory as a result of two major trends. The first of these trends is globalisation, which increases the frequency of interlinguistic contact. Linguistic diversity has become an inescapable feature of modern societies, at the workplace, in the classroom or during one's free time, and it pervades economic life (production, consumption, and exchange). The second major trend is technological development, particularly in information and communication, both of which are intimately connected with language skills and language use. (Grin, 2018: 16)

There is no doubt that English is the most widespread and powerful language in the contemporary world (the first global *lingua franca*), and most contributions on global language policies deal with the impact of English (e.g. Crystal, 2003; Blommaert, 2010; Seidlhofer, 2011; Wee, 2013; Phillipson, 2018). One of the recent publications by Chan (2016) provides the evidence of the influence of languages using 20 indicators to measure five basic opportunities afforded by the language. *The Power Language Index* (PLI) is an assessment of the influence of a language on the global stage. It lists 124 languages on their overall importance as well as their strength in creating opportunities in geography, economy, communication, knowledge and media, and diplomacy (Chan, 2016). English occupies the first place overtaking the next most important language – Mandarin – by more than two times. The next most powerful languages are as follows: 3. French, 4. Spanish, 5. Arabic, 6. Russian, 7. German, 8. Japanese, 9. Portuguese, 10. Hindi, 11. Cantonese, 12. Italian, 13. Dutch, 14. Malay, 15. Polish. It should be noticed that the titular languages of the Baltic States occupy rather high positions: Latvian as the 50th, Estonian as the 56th, Lithuanian as the 57th. Against the background of global linguistic diversity (according *Ethnologue* calculations, 7117 languages in 2020, see Online 2) such results demonstrate the potential for long-term viability of these languages despite the fact that nowadays even mid-sized national languages can be endangered. In order to maintain them, well-considered language policy systems need to be developed both within the national states and at the supra-national formations. Even the author of this economy-based evaluation of languages reminds us that 'a language is much more than just a collection of words. It is intertwined with culture and is an emotional aspect of human character' (Chan, 2016: 5).

In a globalized world English has become the preferred second language in most countries. While common international language has some advantages in facilitating cross-border communication, the globalisation also leads to a more prosperous society in which more and more people are interested in other cultures. This increased interest in other cultures and languages could, to some extent, balance out the trend of using only one dominant language. Education systems around the world should contribute to the learning of foreign languages and cultures (Grenier, 2015). However, as R.Wilkinson indicates, 'policies to

promote internationalization may lead to a context where the instructional language is English only' (Wilkinson, 2016: 108).

There are universal tendencies for the spread of English throughout the whole world accompanied by efforts of international bodies, such as the UN, the UNESCO, many different language preservation NGOs, such as *Ethnologue*, *Terralingua*, *Endangered Language Fund*, *Living Tongues Institute for Endangered Languages*, *Sorosoro*, to find a balance between the economic and symbolic value of languages. These organizations collect information, address both governments and the general public, but even the UN declarations and resolutions if not signed by the respective States are not binding. In 2009, Bernard Spolsky concluded that

supranational organizations are able to support notions of human and civil rights including rights relating to language, without being called on to implement them and face their practical consequences. [...] their main influence is in spreading and supporting beliefs about diversity, multilingualism and human or civil rights that can bolster the campaigns of language activists aiming to persuade their national governments. (Spolsky, 2009: 224)

Although the decrease of the world's linguistic diversity has slightly diminished during the last ten years, the global community has still not found tools for finding a compromise between different value systems concerning languages.

LANGUAGES AS VALUE IN THE EUROPEAN UNION

As Latvia has been a Member State of the European Union since 2004, the general philosophical and legal approach of this unprecedented union of countries to the language situation in the member states needs to be studied taking into account their relative autonomy with respect to cultural, educational and language policies. The equality of all official languages and citizens' language rights have been established already in the first Treaty of Rome (1957) and confirmed in the latest documents accordingly. The political and economic goals of the EU have always been associated with the ideas of a common European identity. Languages (24 official languages (including English with somewhat unclear formal status at the present moment), about 80 minority or regional languages, hundreds of diaspora and migrant languages at present) are to be valued as part of Europe's cultural richness. These philosophical guidelines have been developed during the most active decade in the EU's language policy which began in 2001 when the *European Year of Languages* was declared; in 2004, a special portfolio of Commissioner for Multilingualism was allocated. In 2005, a very important report by the European Commission *a New Strategy for Multilingualism* was launched treating languages as an integral part of lifelong learning and for enabling an effective intercultural dialogue. According to this document, the EU multilingualism policy has three aims: to encourage language

learning and promote linguistic diversity in society; to promote a healthy multilingual economy; to give citizens access to the European Union legislation, procedures and information in their own languages.

During the following years, several other programmatic documents concerning languages, development of multilingualism and language protection have been created (e.g. *High Level Group Report on Multilingualism* (2007), *Multilingualism: an Asset for Europe and a Shared Commitment* (2008), *Conclusions on Language Competences to Enhance Mobility* (2011), *Conclusions on Multilingualism and the Development of Language Competences* (2014), *Report on Language Equality in the Digital Age* (2018)), yet the decrease of activities in the language domain has been observed. There has been no special commissioner dealing with language issues since 2007; nevertheless, a complex of problems related to the legal status of languages in the European Union institutions still exists, the coordination of language management in the member states is carried out mostly by NGOs and professional organizations. The existing programmatic documents and guidelines could be considered as long-term, and only some aspects (as language competence indicators, CLIL, early childhood education, language education for migrants) need to be developed within the present stage.

The leading professional organization is the *European Federation of National Institutions for Language* (EFNIL) (see Online 3). All the Member States of the European Union have institutions (as the *Latvian Language Agency* and the *University of Latvia Latvian Language Institute*) representing Latvia in this Federation since 2003) whose role include monitoring the official language or languages of their country, advising on language use, or developing language policy. The EFNIL provides a forum for these institutions to exchange information about their work and to gather and publish information about language use and language policy within the European Union. In addition, the Federation encourages the study of the official European languages and a coordinated approach towards mother-tongue and foreign-language learning, as a means of promoting linguistic and cultural diversity within the European Union.

One of the most discussed issues during many EFNIL fora is the role of English and language competition in the member states. The so-called Brussels Declaration states that 'English is used as a working language in certain professional, educational, and other social contexts in Europe, and while the practical value of this is acknowledged, it is considered of the utmost importance to maintain, strengthen, and further develop all national/official languages of the European countries in all their functional domains' (EFNIL, 2005: 2). Several EFNIL conferences have dealt with the tendencies of the domain loss, in tertiary education and research in particular, for the EU languages other than English due to the widespread use of English. The Florence Resolution states:

This growing attitude represents a very real linguistic, cognitive, and cultural risk. English is not a neutral all-purpose medium of

communication. By the predominant or even the exclusive use of English, important traditions, concepts and methods developed in other languages are ignored or forgotten. In addition, the mainstream of the various disciplines determining those themes and problems considered most relevant can easily become dominated by speakers from Anglophone countries. (EFNIL, 2014: 1)

During the last decade the coexistence or confrontation of English and national languages in the academia has become the key issue in practical language management not only in Europe (see e.g. Hultgren et al., 2014; Wee et al. (eds.), 2013). Robert Phillipson argues that in

European countries in which there are high levels of proficiency in English, an increased use of English can be seen as linguistic capital accumulation, for the individual and the group. The repertoire of languages in use is expanded, i.e., additive bilingual- or multilingualism is being established. By contrast, if English replaces a national language in key functions, in academia, politics, business, or cultural life, to the point where other languages are downgraded and excluded, what has taken place is linguistic capital dispossession. (Phillipson, 2018: 298)

In 2019, the European Commission announced the higher education institutions from all over Europe that will be part of the first European Universities alliances – united by a common view on Europe and on the educational mission of European universities and a strong belief in its multiculturalism and multilingualism (European Commission, 2019). The regional anchoring will give the alliances capacity to spread the values of Europe within the surrounding areas and to ‘bring Europe home’. The University of Latvia has become a member of the FORTHEM alliance (*Fostering Outreach within European Regions, Transnational Higher Education and Mobility*). The alliance is aware that in order to strengthen European identity through education and culture one of the main tasks is to foster multilingualism which is understood as a variety of language resources, including mother tongue skills and national language skills, as well as proficiency in several other languages. However, the creation of these alliances has caused a renewed debate about the use of national languages and the role of English in studies and research. Therefore a special research lab called *Multilingualism in School and Higher Education* (including multilingual and multicultural school environments as a resource and integration of CLIL) is being developed under the auspices of the University of Jyväskylä. The preparatory document suggests that while not excluding the possibility of using English as a *lingua franca* in a few cases, the ambition of the network is to promote multilingualism among both national and regional languages. As such, language tuition in the languages of all partner universities will be provided at each institution, and both students and staff will be incentivised to attain a level of proficiency in at least one partner university

language, to enable them to participate in short-term or long-term cooperation actions in that language (Online 4).

Researchers from six other universities have expressed a strong interest in the proposal of the team from the University of Latvia about comparative studies of multilingualism in tertiary (higher) education and research, and such a project is being developed for evaluation and approval.

LATVIA: BETWEEN INSTRUMENTAL AND INTEGRATIVE VALUE OF LANGUAGES

In 2011, the Cabinet of Ministers of the Republic of Latvia adopted the *Guidelines of National Identity, Civil Society and Integration Policy (2012–2018)*. National identity was described in this document as

a part of a person's identity connecting him or her with other persons having similar national cultural features. Language, the body of values, models of behavior and cultural symbols and social memory are the foundation on which a person's affinity with their nation and mutual unity of those belonging to a nation are formed and maintained. National identity includes the idea of each nation's uniqueness but not superiority, distinctiveness from other nations, the idea of the unity of people belonging to a nation, and the idea of a nation's continuity. (Online 6)

This document had been based on the previous State Research Programme *National Identity (language, Latvian history, culture and human security)* (2010–2013). At present even two State Research Programmes dealing with identity and values are implemented (*The Latvian Language and Latvia's Heritage and Future Challenges for the Sustainability of the State* (2018–2021)). Why research on the national identity, its cultural and linguistic aspects in particular, was and still continues to be proclaimed as an academic priority?

Among more than seven thousand world's languages the objective positions of the Latvian language are comparatively strong. According to the number of speakers (appr. 2.3 million) Latvian belongs even to the world's 200 "largest" languages. The competitiveness of the Latvian language is also strengthened by its position in the state and local government institutions, the armed forces and the education system, including higher education, as well as the growing number and proportion of speakers of Latvian as a second language among minorities (according the Central Statistical Bureau of Latvia for 37.7 per cent of population home language was other than Latvian in 2017, see Online 5). The status of the official language in the European Union is a significant incentive for the sustainability of Latvian terminology. The constitutional status of the Latvian language, the Law on the State Language and its implementing rules have provided the necessary legal framework for the use and freedom of the official

language. More detailed information on the recent language situation in Latvia is available in Druviete and Veisbergs (2018) and on the website of the Latvian Language Agency (Online 7, see also *Language Situation*, 2017).

However, in Latvia's ethnodemographic and geopolitical situation, only statistical data and legislation are not sufficient to understand the language situation, as they do not give a complete picture on language competition with the two languages with much higher economic value (Russian and English). Measurable parameters of the language situation should be analyzed in a broad historical and international context and in close association with language attitudes, or in other words, within the system of values among various societal groups. These values depend not only on traditional narratives, which in Latvia often include stereotypes about Latvian as an endangered and disappearing language, but also on the public awareness of languages and their competition, both in the world and in Latvia. Maybe these facts have to do with the so-called identity construction already since the 19th century? E.g., even in the *Preamble of the Constitution of Latvia* (2014) the Latvian language has been mentioned three times making Latvia a unique case in the world. Does it mean the special position of the Latvian language within the complex phenomenon of the (national) identity?

The studies of the Latvian language situation provide a complete quantitative analysis of language skills and language use in various sociolinguistic domains, however, language-related attitudes still need to be studied more deeply. Therefore one of the sub-projects for the State Research Programme *the Latvian Language* is dealing with the qualitative studies of language attitudes (including public opinion about language issues, linguistic stereotypes, identity construction, etc).

CONCLUSIONS

In the context of maintaining the global linguistic diversity the role of humanities is increasing all over the world. the field of humanities has a double mission, which is not only to strengthen the national state and to enhance the understanding of its most significant elements (history, language, literature, public opinion, etc.), but also to make a contribution to the global knowledge pool. Universities are the bearers of any nation's cultural identity; they link participation and development, traditions and innovative approaches in both sciences and humanities. As OECD indicates, 'R&D comprise creative and systematic work undertaken to increase the stock of knowledge – including knowledge of humankind, culture and society – and to devise new applications of available knowledge' (Frascati Manual, 2015: 44). Innovation in its modern meaning is a new idea, creative thoughts, new imaginations in the form of device or method, application of better solutions that meet the new requirements of society. Innovation may refer to the non-economic change processes. Sociolinguists who are exploring the new forms of innovation may strengthen the evidence base for

the language policy actions, including language studies. However, it is evident that multilingualism (societal multilingualism – functioning of several languages at a society level and individual multilingualism or plurilingualism – functional ability to use more than one language at the individual level) is one of the most relevant features of the contemporary global society.

Usage of English as one of the leading components in both societal and individual multilingualism is a global reality in almost all the European countries, although there is no reliable theory on how the models of national/English language coexistence function in different sociolinguistic domains, especially in the higher education and research. The ex-president of Latvia prof. Vaira Viķe-Freiberga, urging scholars to study the identity issues, pays attention to a very important point:

It would be a grievous error to label all attempts at defending national interests and identity as extremist and chauvinistic, especially with respect to language and culture. After all, national interests with respect to security, trade, and profit are considered rational and justifiable, so long as they do not lead to excessive protectionism and serious barriers to international trade. Reasonable concern for both these domains is perfectly legitimate and should not be too quickly labelled as bigotry, racism, xenophobia and isolationism. (Viķe-Freiberga, 2018: 52)

Treatment of language as a value, usually as a symbol of national and/or individual identity alongside with treatment of languages as a means of communication and economic assets would help to maintain global linguistic diversity. Is language both a global and national value in the pragmatic world? Would it continue to be a value even in a situation where the other global challenges as climate changes, migration or pandemics prevail? Researchers still have to find answers to these questions.

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ASSESSMENT OF ACADEMIC STAFF PERFORMANCE IN ENGLISH MEDIUM INSTRUCTION

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Abstract. One of the *internationalisation strategies for higher education institutions* is internationalisation of their curricula by delivering English-medium instruction programmes. These internationalization efforts can be successful if support for the language needs of all stakeholders involved is provided. *English language proficiency assessment of academic staff is an essential prerequisite to the implementation of a high-quality study process in the English language.* Therefore, the aim of this paper is to validate the assessment system of academic staff performance in English medium instruction at a university in Latvia and the use of mediation strategies as a basis for the assessment system development. The qualitative and quantitative analysis of the test results suggests that the integrated assessment tasks demonstrate higher internal consistency and higher correlation with the test results and the performance of the academic staff in the international setting.

Key words: English-medium instruction, mediation strategies, university, academic staff, English performance assessment

INTRODUCTION

Higher education (HE) strategies in the European Union (EU) are affected by worldwide globalisation and internationalisation of HE. Internationalization, as ‘the integration or intercultural dimension into the tripartite mission of teaching, research and service functions of Higher Education’ (Maringe and Foskett 2010: 1), is promoted at international, national and institutional levels.

Internationalisation can be perceived as recruiting and exchange of international students to pursue their undergraduate and postgraduate degree programmes, as attracting and employing international academic staff and as preparing home students for an international career. In order to facilitate international competitiveness, internationalisation strategies for higher education institutions (HEIs) in Latvia are formulated in the policy document ‘The National

Concept for the Development of Higher Education and Institutions of Higher Education of Latvia for 2013–2020' (Ministry of Education and Science of the Republic of Latvia, n.d.). At the University of Latvia (UL), the development of study programmes in EU official languages has been politically encouraged as part of the internationalisation strategy set out in the UL development strategy 2016–2020 (The University of Latvia Development Strategy 2016–2020. Summary, 2017).

English-medium instruction (EMI) programmes, which have been defined as the teaching of academic subjects using the medium of the English language in countries where English is not the national language, have been seen as a mechanism for internationalising the educational offer and increasing international mobility. There has been an increasing tendency to introduce English-medium instruction programmes in the world. For instance, universities in Finland, Sweden and the Netherlands have the largest proportion of EMI programmes (Wächter and Maiworm, 2014). The University of Latvia also offers bachelor study programmes, master study programmes, professional study programmes, and doctoral study programmes in English.

EMI programmes require a high English language proficiency level not only on the part of students but also academic staff, whatever their mother tongue is. Since most academic staff who teach through EMI are not native speakers of English, they often lack adequate English language skills. Therefore, teaching academic subjects in English has become a serious academic quality issue and must be addressed by universities.

Recently, many higher education institutions in Latvia, including the University of Latvia, have signed the 'Agreement between the Ministry of Education and Science of the Republic of Latvia and Higher Education Institution Good Practice of Attracting International Students and Delivering Studies' (Ministry of Education and Science of the Republic of Latvia, n.d.). To ensure the delivery of a high-quality study process, this document stipulates that a HE 'institution shall ensure that study programmes for international students are implemented by qualified teachers whose level of foreign language in relation to implementing the study programme is high, preferably level C1' (ibid.). Thus, English language skills of academic staff are an important pre-requisite for a successful implementation of EMI programmes (cf. Kalnbērziņa, 2017).

There have been many studies that analyse EMI implementation in various countries (e.g. Dearden, 2014; Earls, 2016; Fenton-Smith, Humphreys and Walkinshaw, 2017; Margic and Vodopija-Krstanovic, 2017). However, only a few researchers (e.g. Carrió-Pastor, 2020) have attempted to focus on assessing English language proficiency of academic staff who are already teaching or who are expected to teach their subjects in English at some point in their academic careers.

Therefore, in this article, we analyse the construct and the results of the EMI test of academic language skills developed for the academic staff of the UL. This paper does not aim at measuring whether the academic staff have gained

proficiency by taking English language classes. Whether or not there has been sufficient training for academic staff at C1 or B2 levels to be able to teach their academic subjects in English is open to debate and is not the focus of this paper. Instead, we focus on the English language performance test for academic staff, its construct and its validation methods.

ASSESSMENT SYSTEMS FOR ENGLISH MEDIUM INSTRUCTION

There are a number of internationally recognized English language tests, but they are general English tests that do not measure the capacity of academic staff to deal with the English language in an academic context, that is, when using EMI, researching and publishing research articles. For this reason, universities across the world have been working on the development of curricula and English language tests for academic staff (see Table 1 below) to ensure that they have a good command of language so that their students can receive high quality teaching. The approaches adopted by universities differ in their contents: from testing *oral* proficiency in Denmark (Test of Oral English Proficiency of Academic Staff (TOEPAS)) to the focus on *writing* research papers in Australia (Scholarship of Teaching and Learning (SoTL)) ‘movement’ to *overall* quality assessment for lecturers’ assessment in Malaysia and in their means: from a locally developed self-assessment test in Germany, to reference of paneuropean Common European Framework of Reference (CEFR) levels in Indonesia, Denmark and Germany.

Table 1 Review of assessment instruments for academic staff

Country	Assessment tool	Criteria	Source
Malaysia	Staff performance appraisal	Publication/Writing Research Conferencing Teaching Consultancy Services Personality	Salmuni et al. (n.d.)
Australia	SoTL ‘movement’	Structured programme leading to publications	Plews and Amos (2020)
Denmark	TOEPAS	TOEPAS linked the to the CEFR criteria	<i>Kling and Stæhr</i> (2012)
Germany	Self-assessment of university teachers	Adequate for teaching needs B1-B2 (CEFR)	Dimova, Hultgren and Jensen (2015)
Indonesia	Postgraduate program in English instruction-based universities	English for Academic Purposes test score must reach international level to at least CEFR level B2	Marsaulina (n.d.)

As we can see from Table 1, three out of five cases (Denmark, Germany and Indonesia) refer to CEFR levels B1 and B2, focusing on speaking skills, while the other two (Australia and Malaysia) stress the importance of writing and its link with the lecturers' ability to produce publications.

ASSESSMENT CRITERIA FOR MEDIATION

Although the *Companion Volume of the Common European Framework* (Council of Europe, 2018) has the same system of language assessment levels as CEFR (Council of Europe, 2001), we can see a shift from the traditional division between writing and speaking skills to the integration between reception, production and interaction strategies, providing many new scales for mediation strategies. These are defined as follows: 'In mediation, the user/learner acts as a social agent who creates bridges and helps to construct or convey meaning, sometimes within the same language, sometimes from one language to another' (Council of Europe, 2018: 103). The creation of new meaning is mentioned in the definition above, but the construction of new knowledge is added when discussing 'mediating functions: that of organising collective work and the relationships between participants; that of facilitating access to – and the construction of knowledge' (ibid.: 43).

According to Hyland (2015: 3), organising collective work and constructing knowledge directly relate to the essence of the work of academic staff: 'Academic publishing is central to the construction of knowledge and the measurement of the academic's professional competence'. Thus, the mediation construct allows us to connect the Malaysian and the Australian view of academic performance first and foremost as the production of publications with the Danish, German and Indonesian academic staff assessment systems, focusing on the lecturers' spoken performance (see Table 1 above).

The choice of mediation descriptors for assessment of academic staff can also be motivated by the description of a successful mediator at level C1 (Council of Europe, 2018: 105), as someone who (1) helps to maintain positive interaction by interpreting different perspectives; (2) manages ambiguity, anticipates misunderstandings; (3) builds on different contributions to a discussion; (4) stimulates reasoning with a series of questions; and (5) conveys clearly and fluently in well-structured language the significant ideas in long, complex texts (Council of Europe, 2018: 105).

All these activities can be seen as desirable in a lecturer, as we are navigating the misunderstandings between the traditions of our scientific field and the student interpretation of its demands, organising discussions, trying to stimulate the thinking of the students and trying to convey the latest research as clearly as we can.

RESEARCH METHOD

Construct validation method has been recently analysed by Im, Shin and Cheng (2019), where they compare the approaches proposed by Messick (1989), Mislevy, Steinberg and Almond (2003), Chapelle et al. (2008) and Kane (2013). In the present study, we follow Chapelle et al.'s (2008) framework, as we focus on mediation strategy use, which we have described and operationalised in our test, observed the score obtained by the test takers, compared it to the target score and used the obtained results to assess the test takers' performance.

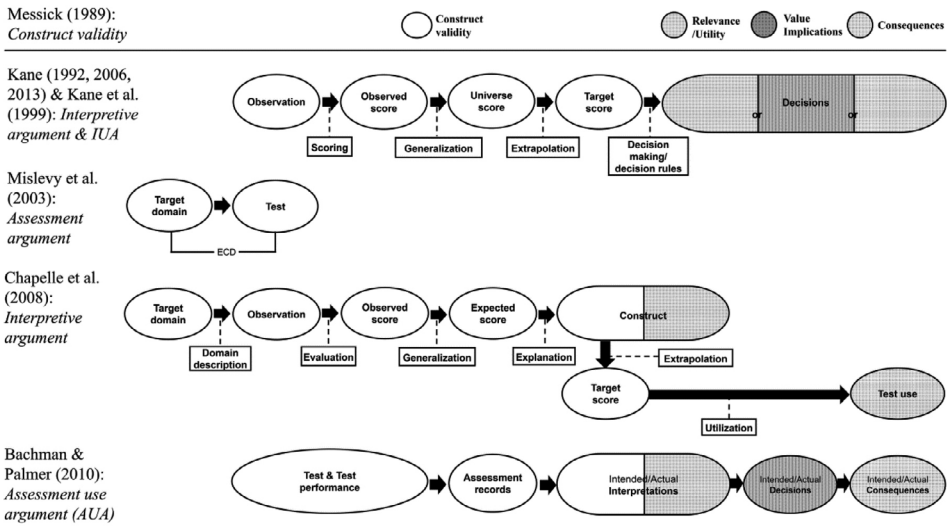


Figure 1 Construct validation methods (Im et al., 2019)

Compared to Bachman and Palmer's *Assessment Use Argument* (2010) and their focus on interpretation, decisions and consequences, Chapelle et al. (2008) are concerned with the theoretical and empirical construct validation, which is more appropriate in our case, as we can control the theoretical construct, but cannot control the decisions taken by the administration of the university on the basis of the administered test. Chapelle et al.'s (2008) approach also allows us to integrate the quantitative and qualitative validation methods using a mixed method approach.

RESEARCH CONTEXT

The University of Latvia started the academic staff competence enrichment project in 2018. The aim of the project is to promote the professional development of the UL staff, to attract young and talented international as well as local researchers. One of the objectives of the project is to develop the academic and

professional English language skills of the academic staff in the humanities, social, medical and life sciences for their use in the academic setting.

Assessment is an integral part of language teaching in the project. The course starts and ends with English language proficiency assessment using standardised tests aimed at levels B1-C1. The test administered before the study course is based on an international placement test using discrete multiple-choice items to assess lexical and syntactical structures. The test was administered online in Moodle, the test takers were not observed; thus, the tests can be considered as a form of self-assessment. The test results were used to divide the academic staff into B1, B2 and C1 groups. The total volume of the course comprised 210 academic hours providing the staff with the necessary professional English language support for the acquisition of lexical and grammatical knowledge, spoken and written proficiency as well as reading and listening skills through teaching a blended learning multimodal course adjusted to the specific needs of each specific group. The staff were assessed again at the end of the course.

The end of the course test was developed by the English language teachers of all the groups, then the tests were pretested in other academic staff groups and analysed using IteMan (*ITEMAN Classical Test Theory Analysis*, n.d.). The items with positive discrimination, and tasks whose alpha coefficient was not lower than 0.6-0.7 were edited and combined in a single test, ranging the difficulty levels from B1 level to C1 level, from separate reading and listening skills to integrated reading/writing skills tasks. The test specification can be seen in Table 2.

The speaking test was administered by two people, both taking notes and assessing the performance after each case and assigning the points for presentation skills, interaction skills, data interpretation skills, linguistic range and phonological control. The multiple choice and the matching tasks were clerically marked, but all the other tests were marked using marking scales, which were updated while marking in order to incorporate the details of performance and improve the reliability and validity of the assessment. All the results were data processed, and their reliability and internal consistence were checked by calculation of correlation.

TEST RESULTS

After the delay caused by Covid 19 epidemics, the test of 2020 was taken by 68 academic staff members who had followed the course for a year. The test construct is based on equal distribution of 20 points for each language skill (reading, writing, listening and speaking). It starts with a listening task of a recorded fragment of a two-minute presentation, where the test takers fill in the gaps in the transcript of the recording with such words as *feedback*, *components*, *focus*, *interviewing*, *tracking*. The aim of the task is to assess the test takers' detailed understanding of the audio recording and their ability to identify important academic vocabulary in the recording. This was aimed at level B1 test takers,

and it was also the easiest task with 78 per cent average, compared to the reading multiple choice task, where the facility value was 51 per cent. The difference of 27 per cent between the easiest and the most difficult items supports our claim that the test is appropriate for a range of performance levels (B1-C1).

Table 2 Academic staff test specification, task weighting and mean

Level	Skill	Task description	Maximum Points	Mean %
B1	Listening for detail	Gap fill	6 points	78
B1-B2	Listening and writing (Spoken text mediation)	Summarize the lecture and compare the situation to your own	20 points	53
B2	Reading	Multiple choice task	4 points	51
C1	Reading and writing (Written text mediation)	Text summary in a sentence	10 points	58
C1	Reading	Arrange five sentences in a paragraph	10 points	59
B1-C1	Speaking (Spoken data interpretation)	Present yourself, answer questions about your research, describe a graph	20 points	73
Total			70	66

The second task is also a recording of a three-minute fragment of a lecture on the change of the prestige of the university degree. The test takers can take notes while listening, and the task is to mediate between the spoken and written medium, summarizing the lecture and comparing the lecturer's views with their own. This task was assessed using five different criteria from the CEFR CV. Descriptors for Processing text in speech (Council of Europe, 2018: 111) and grammatical accuracy (Council of Europe, 2001: 114).

The third task is a multiple-choice reading task, consisting of four paragraphs, each followed by a multiple-choice question with three distractors. This is followed by a text summary task, which will be discussed in detail later, a rearrangement task and a speaking test, where the test takers needed to describe their research profile and answer questions, describe a graph, which was assessed using the descriptors from CEFR CV (Council of Europe, 2018), namely, presentation skills, interaction skills, data interpretation skills, linguistic range and phonological control.

The minimum performance of the whole test was Min: 23 per cent, Max: 97 per cent, St. dev: 10.19, Mode: 64 per cent, Mean: 66 per cent. Figure 2 shows the distribution curve in the absolute numbers, which has a slightly negative skew.

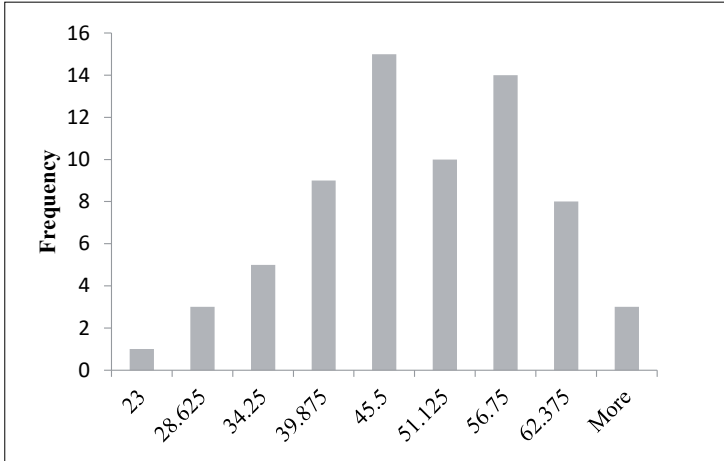


Figure 2 Histogram of the test-taker performance in the post teaching test

The cut off points were primarily decided using the mean and the standard deviation (St. dev. 10.19), then the test scripts near the cut off points were examined carefully, and the borders of the levels were shifted to ensure the reliability of assessment, see Figure 2. The cut off points were established on the basis of standard deviation to convert the points into levels (see Figure 3).

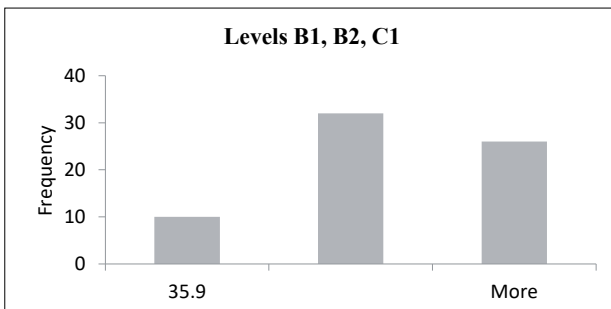


Figure 3 Histogram of levels B1, B2, C1 and their cut off scores

The test results were validated using qualitative and quantitative validation methods. *Qualitative validation*: once the test takers were assigned their levels, those were discussed with the teachers of each group to ensure concurrent validation. The test results and the scripts were also discussed with the test takers themselves in case they felt that the result did not agree with their self-assessment (response validation), or they wanted to discuss the results for further improvement.

Quantitative validation: all the test results were checked using correlation coefficients, which were all positive, although the tasks that assessed reading and listening skills separately had consistently lower correlation levels. The correlations of the test results suggest that the tasks that were aimed at text mediation had the highest internal consistency (see Table 3 below): the correlation between the listening gap filling task and the spoken mediation task (summary of a lecture and own interpretation) is significant but not very high (0.523), although both tasks were based on a spoken text input. The correlation between the written text mediation (summary of a written text) and spoken text mediation (summary of a spoken text and its interpretation) is higher (0.643). The spoken text mediation has also a significant correlation with spoken data interpretation (0.694). The highest correlation index, however, can be observed when correlating the total written test performance with the total results (0.946), suggesting the importance of the combination of reception, production, interaction and mediation strategies for more reliable and valid test results. The low correlations (Cronbach Alpha test) for the sentence arrangement task and reading multiple choice tasks suggest reliability issues for the tasks, which could have been caused by the high facility value for the listening task (see Table 3, but not for the reading sentence arrangement task, which asks for further analysis, which is outside the scope of this research.

Table 3 Correlation indices between the separate tasks

	Listening gap fill	Spoken text mediation	Reading multiple choice	Written text mediation	Reading sentence arrangement	Total written	Spoken data interpretation
Listening gap fill	1,000						
Spoken text mediation	0,523*	1,000					
Reading multiple choice	0,116	0,379*	1,000				
Written text mediation	0,573*	0,643*	0,383*	1,000			
Reading sentence arrangement	0,085	0,177	0,197	0,283	1,000		
Total written	0,662*	0,895*	0,501*	0,824*	0,456*	1,000	
Spoken data interpretation	0,421*	0,694*	0,453*	0,547*	0,180	0,687*	1,000
Total	0,633*	0,873*	0,503*	0,784*	0,369*	0,946*	0,845*

*Statistically significant correlations

MARKING CRITERIA FOR MEDIATION OF TEXTS

The marking criteria for the integrated listening to a lecture and writing a summary task were developed based on the Companion volume of CEFR (Council of Europe, 2018: 111) using receptive, productive, interactional and mediation strategy scales mediating a text: processing a text in speech. These were used to assess the test takers' ability to relay the spoken text in writing, using Jeffrey Selingo's speech on *the Value of a College Degree* (2016) as input.

Table 4 presents a fragment of the marking scale CEFR (ibid.) with the first sentence of the sample scripts for each level. As we can see, the first script (4 points) starts their summary by stating not only the topic, but also the speaker's main message, which further serves as the main hypothesis to be argued using the details of the speech. The second script (3 points) states the topic of the speech precisely enough, which is the value of education, but does not reveal the message of the speech. The third script (2 points) describes the topic partly, thus including incomplete information that interests them more, namely about the attitude of students instead of society, while the fourth script (1 point) claims that the speech is about the education system and many countries in general, thus failing to connect to the original lecture and its topic of the change of the value of college degree.

Table 4 Mediation strategy assessment scale with sample script fragments with the original spelling

Points	Processing text in speech	Sample script (The first sentence of the summary)
4	Clear, complete summary of essential information.	According to the presenter the value of the university degree has decreased. While in the past a degree was perceived as a guarantee of prestigious and well-paid employment, now it may just be enough to get any job.
3	Summarises the important points; one essential point may be missing.	Jeff Selingo gives us his point of view how valuable is a college degree today and in the future. In the beginning of the presentation he mentioned that degree was a signal that you were ready to work.
2	Includes incomplete information. Some important points are missing.	The topic was about new graduated and their problems to find appropriate job. Jeff Selingo thinks that a lot of students have not correct attitude to studies.
1	Information does not connect to the original lecture.	This recording illustrates education system. In many countries was observed that the university degree was not for a good job.

DISCUSSION OF THE TEST RESULTS

Mediation strategy inclusion in the Academic staff English language test and its validation process can be supported by theoretical and empirical arguments:

First, mediation descriptors from the CEFR companion volume (Council of Europe, 2018) agree with the everyday tasks of the academic staff, as we need to mediate between the student knowledge and the theoretical knowledge of our research area which is available in spoken and written texts as well as visual information graphs in English language medium instruction. The mediation descriptors can also be used in assessing academic staff's written and spoken performance for both objective and subjective tasks.

Second, Chappelle et al.'s (2008) construct validation framework allows us to examine the construct of a language test from the very beginning of test conception to the test-taker performance analysis and its interpretation, thus enabling us to develop a test, evaluate the performance, extrapolate the findings and generalise back to the construct measured by the test.

Finally, both quantitative and qualitative analyses of the English language performance of the Academic staff suggest that the mediation strategies enrich the construct with variables not tested by the traditional reading, listening, writing and speaking tests as suggested by the correlation indices between the different tasks in the academic English performance test. The correlation indices suggest inner construct existence that needs further research using, for example, structural modelling methods.

CONCLUSIONS

Internationalization of higher education has implications for the use of English in knowledge generation and dissemination in EMI programmes. Successful implementation of EMI programmes requires addressing the needs of all stakeholders, including qualified academic staff, who are required to know the *English* language at least at level B2, preferably at C1 level. Thus, assessment of academic staff is carried out across the world. The systems and the criteria differ, but there are also common variables: spoken and written production is the preferred media for assessment, while mediation strategies are not so often used. Nevertheless, the mediation strategies construct is similar to the role of the academic staff as new knowledge constructors creating new meaning to texts in different languages and different media. Mediation strategy construct operationalization in the new descriptors of the CEFR allow us to assess the ability of the academic staff to mediate between the spoken and written media, and the level descriptors allow us to discriminate between the different levels of ability to manipulate the meaning of the spoken text in a written medium.

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METAPHORIC CONCEPTUALIZATION OF SOCIAL REALITY IN THE LANGUAGE OF NEWS MEDIA

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Abstract. Today, social reality can hardly be viewed as the one-state-one-nation-one language ideological framework (Bauman and Briggs, 2003). The modern multilingual and multicultural communities are inclined to examine social reality in a multiple variety of socio-economic and political manifestations and forms. To understand how social reality can be explored through examining certain socio-political processes in a country, the present paper aims at analysing the role of conceptual metaphor in cases when political scandals, involving corruption charges of high-ranking officials in Latvia are considered. For this purpose, the present study has focused on the analysis of selected commentaries that deal with corruption charges which were revealed in December 2019 issues of the magazine *IR*. The Latvian-origin weekly magazine *IR* was selected deliberately because; on the one hand, it has an enormous influence on how social reality is constructed and perceived by Latvian citizens. On the other hand, it was important to reveal that the evidence-based theoretical premises on the relationship between metaphor and society in the English language are applicable and work cross-linguistically in Latvian. The research presents a case study type. With the focus on the conceptualization of corruption-related social problems, selected discursive practices that dealt with the corruption cases being revealed by the news medium *IR* were considered. The results demonstrated that the journalists of the commentaries tend to take a critical discourse perspective on the representation of corruption-related issues and political events, which can be represented at the levels of abstraction. Conceptual metaphors contributed to mental representations of political issues and communication of social reality by conveying additional negative evaluation of such an inherently derogatory concept as corruption. The metaphors CORRUPTION IS DIRT, CORRUPTION IS GARBAGE, CORRUPTION IS NUCLEAR DISASTER, CORRUPTION IS A DISEASE also fulfil a cognitive function, helping to understand the concept of corruption in terms of another more concrete concept. The use of metaphors in the commentaries may have causal effects such as bringing about changes in the readers' knowledge, beliefs and attitudes.

Key words: conceptual metaphor, corruption-related political scandals, magazine *IR*, qualitative discourse analysis, case study

INTRODUCTION

Social contexts and conditions have always been a subject to analysis or interpretation. It is generally known that political discursive practices are based on ambiguous use of language to reveal political realities. Thus, the concept of corruption, which can be referred to as the abuse of power for private gain by public officials, plays a prominent part in contemporary society. The consequences of corruption are dire for each member of society, as people are generally aware that corruption retards economic growth, hinders investment and leads to lower public welfare.

Latvia appears to be perceived as a country which has hardly succeeded in making serious inroads against public sector corruption (Online 1). The analysis of the corruption index data by Delna, the Latvian branch of Transparency International, reveals the inability of 'law enforcement authorities to detect and prosecute corruption cases involving officials' (Online 2). Due to its socially undesirable and hidden nature, the level of corruption in a country cannot be measured directly. It can be done by surveying the opinion of experts, general population, entrepreneurs, public officials, as well as by carrying out institutional control.

Information about various social issues is mostly obtained from the mass media, which disseminate information and generate images of the world, thus helping society to construct meaning of economic, political and social matters. It can be assumed that the media have the capability to affect society's opinion or change its attitude towards an issue. In this regard, the use of language in the media plays an essential role in the process of the 'social construction of reality' (Berger and Luckmann, 1976, cited by Conboy, 2007: 5).

The weekly magazine *IR*, as a powerful media institution in Latvia, addresses various social issues, including corruption, and has an enormous influence on how social reality is constructed in Latvia.

The theme on the use of conceptual metaphor in different discursive practices is not a novel one. It has been explored in a multiplicity of ways when the analysis on topical data was conducted. Edelman has already stated that 'metaphors, other tropes, and ambiguity encourage people in disparate social situations to define themselves, others and the conditions of their lives' (Edelman, 1988: 103-120). Journalists often employ metaphor in their writing, as metaphor 'invites a shared perception that transcends that of the semantic system' (Charteris-Black, 2004: 13), 'metaphor in language exhibits indirect meaning, producing local semantic incongruity, which needs to be connected to the encompassing semantic frame of a text, paragraph, sentence, clause or even phrase by some form of non-literal comparison' (Steen, 2011: 45). Besides, metaphor is a figure of speech that encourages people to keep a broader perspective on understanding cultural, historical, political, social realities and world views. Metaphor is often used as a strategic tool to evoke a belief that particular groups of people are involved in harmful activities that maximize a negative impact on society.

The recent range of the conceptual metaphor study is very broad, for example, from the analysis of conceptual metaphor use in literary text narratives (e.g. Trendel, 2014: 94-101) to the analysis of metaphoric conceptualization use in political discourses (e.g. Tincheva, 2020: 149-167). Thus, the present study views the use of conceptual metaphor being a means of making sense of the world and offering a richness of meanings which can create images, such as corruption or bribery, for example.

Corruption or bribery being an abstract concept, which is sometimes euphemistically called a 'facilitating payment' or 'speed/grease payment', is the target concept which needs elucidation. For instance, Negro's (2015) study concluded that corruption is often discussed in metaphorical terms in the Spanish press. Bratu and Kažoka's study (2018:59) identified the sources for metaphorical comprehension of corruption; for example, they can relate to various forms of corruption, for example, conflicts of interest, bribery and embezzlement. However, to the best of authors' knowledge, there have not been many studies of corruption-related metaphors in the Latvian language; therefore, the aim of this paper is to shed light on the use of conceptual metaphor in the coverage of political scandals, involving recent corruption-related charges of high-ranking officials in Latvia.

THEORETICAL FRAMEWORK

Since the seminal publication 'Metaphors We Live By' by Lakoff and Johnson (1980), which posits that metaphor is ubiquitous and an essential part of thought, there has been a growing interest in the Conceptual Metaphor Theory (e.g. Charteris-Black, 2004, 2005; Gibbs, 2011; Kövecses, 2005, 2017; Steen, 2011, 2017), and the present-day understanding of metaphor is commonly based on the cognitive-linguistic approach to metaphor by Lakoff (1993).

According to Lakoff and Johnson (1980), metaphor can be regarded as a mapping or a set of correspondences between a source domain and a target domain, which allows for understanding an abstract domain of experience (i.e. the target domain) in terms of a more concrete domain (i.e. the source domain). As a result, the addressee experiences one thing in terms of another (Lakoff and Johnson, 1980: 5). Kövecses emphasizes the systematic nature of correspondences: 'A conceptual metaphor is a systematic set of correspondences, or mappings, between two domains of experience' (2017: 125).

Journalists often employ metaphor as an indispensable basis of language and thought and a convenient cognitive device for organizing human experience and communicating reality in society: 'A large part of the conceptualization process in the media involves metaphor' (Kövecses, 2018: 125). Metaphor seems especially 'open' for meaning making, as journalists cannot be sure that they have succeeded in convincing the reader of the preferred meaning of social reality. Moreover, the process of meaning-making, particularly, the reception of the text, often involves implicit interpretation.

The ideas of the Conceptual Metaphor Theory have been refined (e.g. Kövecses, 2010), and other approaches to the study of metaphor have appeared. For instance, Steen (2011) supposes that the traditional cognitive linguistic approach does not consider all aspects of metaphor. Steen (*ibid.*) has expanded the approach by adding the dimension of communication to the conceptual and linguistic dimensions. The discourse analytical approach followed by Steen (2011) postulates that the three-dimensional model of metaphor encourages the explanation of the deliberate use of metaphor in communication. The scholar claims that it is relevant to pay attention not only to the linguistic forms (e.g. metaphor) and the conceptual properties (e.g. conventional versus novel) of metaphor, but also to its communicative structures and functions (such as deliberate versus non-deliberate use) (*ibid.*). This may suggest that, for instance, journalists use metaphoric linguistic expressions being aware of cross-domain mappings, as they want to alert the reader and deliberately manipulate their message for communicative purposes.

Along with other assumptions about metaphor in language use, the idea of deliberate and non-deliberate metaphors is explained in the Deliberate Metaphor Theory by Steen (2017). The scholar argues that discourse is an intentional verbal activity between the sender and the addressee. A deliberate metaphor is used intentionally in communication (*ibid.*: 1): ‘all metaphor use is intentional, but [...] some metaphor use is deliberate (intentionally used as a metaphor) while most of it is not’ (*ibid.*: 6). The use of deliberate metaphor explicitly asks the reader to ‘step outside the dominant target domain of the discourse and look at it from an alien source domain’ (Steen, 2011: 37). Thus, deliberate metaphors encourage the addressee to set up a cross-domain mapping in their mental representation of discourse in order to view one thing in terms of another and to draw relevant implicatures from that figurative comparison. It is generally known that the processes that explain how people understand each other’s intended meanings are among the central questions in cognitive approaches taken to the study of the conveyed meaning. The linguists (e.g. LoCastro, 2006) who attempted to answer this question have analysed the human capacity to convey and understand the implied meaning; thus, the notion of implicature has come into focus of the linguistic study.

This reveals that metaphor is not just a matter of language and thought but also of communication. When non-deliberate metaphors are used, they do not necessarily have to deal with the relation between the two domains that may be distinguished; an utterance is typically understood as involving just one conceptual domain, i.e. the target domain. The sender and the addressee of the message may just employ polysemous words that are conventionally used to talk about a certain issue (*ibid.*).

Several scholars (e.g. Gibbs, 2011) criticize the dichotomy between deliberate and non-deliberate metaphors, claiming that ‘deliberate metaphor’ is ‘not essentially different from other forms of metaphoric language’ (*ibid.*: 21).

Although Steen (2017) admits that ‘the distinction between deliberate and non-deliberate metaphor is controversial’, the scholar emphasizes that both the phenomena fulfil different functions in language use (ibid.: 17).

The communication dimension of metaphor as a figure of speech emphasizes the rhetorical function of metaphor, which is stressed in the Critical Metaphor Analysis Theory by Charteris-Black (2004, 2005). Metaphor use in context determines the role of metaphor in communication. The scholar argues that the cognitive semantic (or linguistic) approach needs to be complemented by pragmatic functions (e.g. persuasive, evaluative and ideological in political discourse) (Charteris-Black, 2004: 12). Thus, to achieve the intended pragmatic functions, journalists may be prone to deliberate metaphor use. For example, the persuasive function of metaphor helps to see the world from a novel perspective (ibid.: 11) and affects the interpretations made by the reader (ibid.: 9).

The reader of commentaries receives world images through the lens of the journalist, which tend to evince the social reality of today but ‘still within the broad frame of the newspaper’s editorial identity’ (Conboy, 2007: 73). Social construction may be largely unconscious on the part of the image producer. In this case, images appear as transparent descriptions of reality, but the reader may be encouraged to experience not only information-transmission, but also opinion-formation or even persuasion and evaluation. Moreover, since commentaries are polysemic, readers are expected to become active in meaning construction by drawing on their experience and knowledge.

METHODOLOGY

Following the premises of Critical Discourse Studies (Wodak and Meyer, 2016: 34), the following steps were applied to the analysis of the case study.

- 1) Preceding theoretical knowledge was consulted and activated.
- 2) Relevant social context information was collected.
- 3) All the commentaries on corruption-related issues from December 2019 issues of the magazine *IR* were selected: *Tiešs trāpījums* (*Direct Hit; here and henceforth the translations by the authors of the article*) by Aivars Ozoliņš, *Izvest miskasti* (*To Collect Garbage*) by Pauls Raudseps, *Duļķainos ūdeņos* (*In Turbid Waters*) by Aivars Ozoliņš. The choice of this period was motivated by the wide coverage of political scandals involving corruption-related cases in the mass media in Latvia. The magazine was selected because of the style of writing of the journalists who frequently use metaphoric expressions in their writing.
- 4) Assumptions based on the literature review and a first skimming of the data were made, and a research question was specified: How do conceptual metaphors help to conceptualize corruption in the selected commentaries from December 2019 issues of the magazine *IR*?

- 5) To focus on the conceptualization of corruption-related issues in *IR*, a qualitative discourse analysis was conducted. Since a conceptual metaphor is realized with the help of metaphoric expressions, metaphors in the commentaries were searched manually and identified using the inductive approach, i.e. the linguistic forms that seemed to be metaphorical were located, and later the linguistic metaphors were grouped by reconstructing cross-domain mappings on the basis of groupings of linguistic expressions.
- 6) The yielded data were analysed from the perspective of the language users participating in the discourse (i.e. readers), and the linguistic value was grouped in the categories of context, metaphor, the source domain and the meaning of the metaphor and mapping. the conceptual value of a conventional or a novel metaphor was stated, and the choice between a deliberate and non-deliberate metaphor was shown. A communicative dimension of metaphor, which underlines the rhetorical function of metaphor, was described.
- 7) A critique, relating to 'a quest for truth' (Wodak and Meyer, 2016: 34) and the interpretation and explanation of the results, taking into account the relevant context knowledge, was formulated.

The following style conventions are used in this article: upper case is used to represent conceptual metaphors; the excerpts containing metaphoric expressions from the commentaries in the Latvian language are shown in parentheses; the excerpts containing metaphoric expressions have been translated into English by the authors of this article and placed in single speech marks. Metaphoric expressions are shown in italics.

DATA ANALYSIS

Violation of the accepted social or moral communication codes, negligence of new social and/or political conditions can be also considered as subjects to different interpretations by journalists. The mass media often give publicity to those groups of people who are placed in prioritized social situations, and the mass media use stylized utterances for sets of statements or forms of expressions which are clear to those who are involved in communication. This is done to minimize society's attention to wrong-doing(s) and/or to maximize truth-hiding interaction beneficial to those directly involved in corruption-related cases (for example, *the Riga Zoo* case in Riga, Latvia, which refers to an informal secret meeting of the parties in the government at that time at the Riga Zoo, where they agreed on a particular Latvia's presidential candidate). Thus, it should be emphasized that the language employed for depicting social reality depends on the social or situational context in which the language is used, and 'the spectacle that language constructs is dynamic: concerned with [...] challenges and differences of opinion over how to deal with them' (Edelman, 1988: 106). As a result, the subject for

the subsequent discussion focuses on the analysis of three selected corruption-related instances as they have been revealed by the Latvian magazine *IR*.

1 TIEŠS TRĀPĪJUMS (*DIRECT HIT*) BY AIVARS OZOLIŅŠ

On 9 December 2019, the U.S. Department of the Treasury's Office of Foreign Asset Control imposed sanctions on Aivars Lembergs, mayor of Ventspils since 1988, and four legal entities associated with him, based on the so-called Magnitsky Act. Mr. Lembergs was described as an oligarch with substantial influence in politics who has 'corrupted law enforcement officials' and 'subverted politicians' for his own economic gain (Online 3).

It is expected that the main headline expresses the highest macroproposition of the article, signalling the most relevant information. The main headline of the article '*Direct Hit*' (*Tiešs trāpījums*) is a metaphor. The headline does not give an immediate summary of the article; therefore, the conceptual value of the metaphor is that of a deliberate metaphor and a novel metaphor. The sub-headline 'USA sanctions against Lembergs will be beneficial to Latvia' (ASV sankcijas pret Lembergu nāks par labu Latvijai) helps the reader understand the theme and the context. We can read that, in fact, the purpose of the USA sanctions is to prevent and diminish the economic and political influence of Lembergs rather than paralyze Latvian economy.

This is further supported by another headline above the second column, which is printed in white letters on red background. It uses the source domain of war, namely, 'Oligarchs' central *bunker destroyed*' (Oligarhu centrālais *bunkurs sagrauts*). The noun 'bunker' in the meaning of 'dug-out fortification' (Online 4) can be traced back to the 20th century or World War I when aerial bombardment started. The bunker is usually hidden underground; it is a shelter with strong walls to protect the people inside it. The metaphoric use of the bunker creates an image of a place where oligarchs feel safe, protected and unharmed.

Using the source domain of illness, the bunker is referred to as '*a site of infection*' (*infekcijas perēklis*), and Mr. Lembergs is its 'long-term host' (ilggadējs saimnieks) and '*a parasite*' (*parazīts*). This implies that corruption is wide-spread, and Mr. Lembergs lives by profiting from illegal activities. The same source domain is employed to refer to the decisions taken by the government 'in order to confine *the site of infection*' (lai norobežotu *infekcijas perēkli*), which may endanger other business and governmental structures.

After the lead paragraph, which serves the introduction function, the main events are introduced with the help of war metaphors: 'The intercontinental *direct rocket hit of sanctions* drove the Latvian senior oligarch out of *his bunker* to brawl again' (Sankciju *starpkontinentālais raķešu tiešais trāpījums* izdzina Latvijas oligarhu senioru no *bunkura* ārdities atkal). Mr. Lembergs is not safe any longer, and, although he denies all the accusations in the public space, decision makers can finally act: '*The blast has destroyed [...] the radioactive* "what says Lembergs" *cloud*' (*Sprādzieni ir iznīcinājis [...] radioaktīvo* 'ko saka Lembergs' *mākoni*).

Mr. Lembergs has been charged with bribery, money laundering and abuse of office since 2008, but he has denied all the charges and has not been tried for the corruptive cases yet, thereby causing a loss of Latvian public funds. The use of the source domain of nuclear disaster/ aerial danger existing in the form of 'a direct rocket hit' indicates that 'the missile', namely, the sanctions were guided. Thus, it is seen that the metaphor of war is used to reveal corruption as an enemy that has been targeted and destroyed with the help of international sanctions.

The main events categories are revealed as various consequences in the following paragraphs. For instance, the reader's attention is drawn to the demerits of nuclear power: 'the hit of the seismic waves' (*trieciena seismiskais vilnis*), which has a far-reaching effect. Resorting to the source domain of building, the author is optimistic and voices that this is the end of Mr. Lemberg's rule 'the collapse of Lemberg's empire' (*Lemberga impērijas sabrukums*).

The results above show some interesting findings. CORRUPTION IS an ILLNESS dominates the commentary. Corruption is framed as an illness or an infection that damages the country's reputation and worsens its economy. Another central metaphor CORRUPTION IS a NUCLEAR DISASTER conjures up the idea of the Chernobyl disaster, which a large part of Latvians are familiar with as the worst nuclear power plant accident in history having a detrimental effect on the environment and people's lives. Measures taken to fight corruption are framed as war: ANTI-CORRUPTION ACTIVITY IS WAR.

2 IZVEST MISKASTI (TO COLLECT GARBAGE) BY PAULS RAUDSEPS

There have been several corruption scandals at the Riga City Council. In September 2019, the Environment Protection and Regional Development Ministry of the Republic of Latvia declared the state of emergency in Riga due to the alleged crisis in the sector of waste collection and management, which is a sector prone to corruption.

The main headline conveys the highest macroproposition of the article, evoking the image of a social problem that will be dealt with, namely, garbage collection in Riga. The sub-headline 'A road to garbage boxes until ballot boxes leads through a minefield' (*Ceļš uz atkritumu urnām līdz vēlēšanu urnām ved caur mīnu lauku*) helps the reader see the relation expressed with the help of the conventional use of the metaphor 'road' – between the waste management issue and municipality elections. 'Road' is a non-deliberate metaphor in the sense that it does not involve the intentional use of metaphor between the journalist and the reader. Needless to say, waste management is profitable business in Riga, and it has been linked with the corruption of high-ranking officials. The deliberate metaphor 'a minefield' gives rise to the activation of the source domain concept as 'an area of land or water that contains mines' (Online 5). A mapping of the negative attributes of the source domain, namely a complicated situation that has many hidden problems and dangers, to the target domain takes place.

The author evokes the image of a dangerous situation in the Riga city, in particular with waste management because of several reasons: 'reasons to kiss off since 2009 ruling kleptocracy in Riga are all around us like *garbage* from an overturned container' (iemesli patriekt kopš 2009. gada Rīgā valdošo kleptokrātiju mētājas mums visapkārt kā *netīras drizas* no apgāzta konteinera.). First, by using the noun 'kleptocracy' in its literal meaning of uncontrolled political corruption, the journalist warns that decisions in Riga are taken by those who make themselves rich and powerful by stealing from the residents of Riga. Second, an image of a dirty city is created, symbolically relating this to the current problems in Riga. Some of them are mentioned explicitly, but the journalist says: 'Who has a larger *sack* may collect more and more *dirt* like this' (Kam lielāks *maiss*, var salasīt vēl un vēl šādas *šmuces*.). The dissolution of the Riga City Council is a question of time. The journalist concludes by saying that '*mountains of garbage* have been piling high in Riga throughout years. It will not be easy to scramble out' (Rīgā *mēslu kalni* krājušies gadiem. No tiem izrausties nebūs viegli.). The noun phrase '*mountains of garbage*' is used metaphorically to refer to the mounting problems in the Riga City Council, evoking a cross-domain mapping between two conceptual domains.

The results of the analysis allow us to conclude that the most prototypical metaphors in the commentary are the conceptual metaphors CORRUPTION IS GARBAGE and CORRUPTION IS DIRT, which draw an analogy mapping negative attributes of the source domain – garbage and dirt – to the target domain – corruption and corruption-related problems.

3 DUĻĶAINOS ŪDEŅOS (IN TURBID WATERS) BY AIVARS OZOLIŅŠ

This article is written at the time when a new governor of the Bank of Latvia has been agreed on by the coalition government. The former governor has been charged with soliciting bribes from retail banks.

It is expected that the main headline '*In Turbid Waters*' (*Duļķainos ūdeņos*) conveys the highest macroproposition of the article; however, it does not help the reader understand what the article is about. As it can be understood from the sub-headline and the commentary, the source domain of water is used to conceptualize the political milieu in which the elections of a new governor of the Bank of Latvia take place. The journalist has selected to describe the situation as not transparent and opaque. The sub-headline 'There was an oligarch candidate for the position of the governor of the Bank of Latvia, too.' (Latvijas Bankas prezidenta amatam bija arī oligarhu kandidāts) helps the reader understand what the commentary is about. An *oligarch* often has the additional connotation of corruption, and one of the candidates being an oligarch might suggest the idea of trading in influence, which is typical of political corruption. Thus, the headline has the conceptual value of a novel and deliberate metaphor, as the cross-domain mapping between the domains has been facilitated.

At the end of the lead paragraph, the source domain of games/sports is used by referring to the process of the search of candidates as ‘a very strange *play-making*’ (ļoti dīvaini *saspēli*) by some influential interest groups. Play makers in football, for example, are the ones whose main job is to control the flow of the team’s offensive play. The journalist draws the readers’ attention to the fact that consultations and ‘political *manoeuvres*’ have taken place before the official decision (*politiski manevri*, protams, notika labu laiku pirms oficiālās lemjšanas). Besides, ‘political *manoeuvres*’ are used in inverted commas emphasising a transferred meaning taken from the source domain of war. the noun ‘*manoeuvre*’ has been borrowed from the French language and means a ‘planned movement of troops or warship’ (Online 5). The importance of the governor’s position at the Bank of Latvia is indirectly revealed by saying that the choice of a candidate might be ‘a theme of potential *conflict*’ (potenciāla *konflikta* tematu). ‘Conflict’ being an ‘armed encounter, battle’ (Online 5) can be seen as a conventional metaphor since it is unlikely that a cross-domain mapping will be undertaken by the readers to infer its meaning.

The journalist implies that consensus-seeking remains the norm when nominations and elections of high-ranking positions are involved; it can be assumed that there has been horse-trading between the parties and that they might have agreed on a candidate behind closed doors. ‘Partners have admonished people from the New Harmony Party *to hold their horses* – their position quotas have already been used.’ (Jaunās Vienotības cilvēkiem partneri bija piekodinājuši, lai *stāvēt pie ratiem*, viņu amatu “kvota” esot izlietota). The text in the Latvian language uses the noun ‘cart’, which is a horse-drawn vehicle, and the phraseological unit ‘*stāvēt pie ratiem*’ means ‘mind your own business’, which is used to tell someone to stop and consider carefully their decision or opinion about something (Online 4).

‘Threat’ and ‘fight’ as conflict words are metaphors because their literal meanings refer to physical combat, while they refer to political action aimed at controlling corruption, money laundering and other illegal actions in the commentary: ‘*real threats* for Latvia to be included in the Moneyval “*Greylist*” already in February’ (*reāli draudi* Latvijai jau februārī nokļūt Moneyval ‘*pelēkajā sarakstā*’). However, they are non-deliberate metaphors, as, although they may evoke some kind of mapping across conceptual domains, it is doubtful that the source domain of war or fighting is activated in the processing of the metaphors. Latvia has received a warning that it might be placed in the Blacklist of the countries that support money laundering activities. The noun ‘*enforcement*’ as in ‘Financial Crimes *Enforcement Network*’ (finansiālo noziegumu *apkaršanas tīkls*) comes from Old French and implies compelling of obedience to a law (Online 5). The Latvian version has a more explicit relation to the source domain of war, the noun ‘*apkaršana*’ means waging war against something.

The term *money laundering* in the commentary ‘to fight against *money-laundering*’ (*cīnīties pret naudas atmazgāšanu*) is an expressive means used to

refer to global financial crime, illegal money which is moved through banks to make it seem legal. The literal sense of the verb 'to launder' means washing, drying and ironing clothes. Hülse writes that 'money laundering transforms "dirty money" into "clean money", illegal into legal' (2008: 99).

The use of money-laundering metaphor is highly conventionalized not only in the English language: 'it is so entrenched in the official vocabulary of global finance that its metaphorical status is often forgotten' (Hülse, 2008: 99), but also in the Latvian language, as the journalist of the commentary has chosen a metaphor instead of the term '*nelegāli iegūtu līdzekļu legalizācija*', which explicitly explains the meaning of the illegal act.

Illegal activities are referred to by mentioning '*shell companies*' (*čaulu kompānijas*), which is a company that is used to hide a person's or another company's illegal activities (Online 4). The reader might not know the meaning of the term; therefore, in order to understand it, cross-domain mapping is evoked: a shell is a container filled with explosives; thus, corruption-related problems are framed as dangerous.

The commentary 'In turbid waters' demonstrates that CORRUPTION RELATES TO CRIMINAL LIABILITY. The terms used in the text under analysis, such as 'to launder money', 'shell companies', 'Moneyval Greylist' are non-deliberate metaphors; their usage does not limit itself only to the area of finance, but it also refers to different types of businesses and taxation. These metaphors, in fact, reveal concepts related to the area of finance that are expressed metaphorically as specific terms, which bear identical semantic meaning, for the concepts hardly exist.

Thus, it can be stated that ANTI-CORRUPTION ACTIVITY IS WAR is central in the examined commentary because war metaphors highlight the physical struggle that is necessary to achieve social goals.

CONCLUSIONS

Political scandals which are often caused by politicians or state officials charged with corruption are treated as a burning social issue and receive a wide coverage in the media. Metaphor used in the media is an effective means of creating a coherent presentation of social reality and conveying images for interpreting the world. It was revealed that the evidence-based theoretical premises on the relationship between conceptual metaphor and society in the English language are applicable and work cross-linguistically in Latvian.

Metaphor fulfils a cognitive function, facilitating the understanding of one concept in terms of another. The conceptual metaphors CORRUPTION IS DIRT, CORRUPTION IS GARBAGE, CORRUPTION IS NUCLEAR DISASTER, CORRUPTION IS a DISEASE, CORRUPTION RELATES TO CRIMINAL LIABILITY, ANTI-CORRUPTION ACTIVITY IS WAR are aimed at affecting the reader's

perspective on corruption and political scandals involving corruption. Consequently, the reader is invited to perform a cross-domain mapping between two conceptual categories, each being coherent organization of experience. The above analysis reveals that when a deliberate metaphor is employed to explain the target domain of corruption, the reader needs to evoke the image of the source domain of a disease, dirt, war, garbage, nuclear disaster, criminal activities and liability.

Besides, metaphor often offers a mental representation that reflects a world-wide shared system of beliefs as well as a different and an unusual way of looking at the world. This suggests that, to some extent at least, human experience and human conceptualization of corruption are largely shared across languages. Although metaphor is open to multiple interpretations and allows readers to bring their own meanings to a text, an evaluative framework is created by the contrast that is set up between two conceptual categories. As a result, commentaries as discourse events may bring about changes in the readers' knowledge, beliefs and attitude.

Since corruption-related metaphors have a derogatory meaning, their use in the commentaries reflects negative evaluation of corruption as a serious social problem. By exploiting the associative power of language, metaphor evokes affective responses because it draws on value systems embedded in the society where corruption as an entity is generally viewed as negative experience. It can be assumed that the negative representations of political scandals involving corruption with the help of source domains activate emotional associations and evoke emotional responses; as a result, negative evaluative meanings are shared by the majority of readers.

The coverage of political scandals, such as recent corruption charges against the former governor of the Bank of Latvia or the United States' Magnitsky sanctions over the alleged corruption of the suspended mayor of Latvia's seaport city of Ventspils, as well as problems pertaining to the waste collection and management sector in the Riga City Council, which point to corruption, reveal inequality in society.

Identification of conceptual metaphors is inevitably subjective, like all qualitative judgements, and the small sample size examined in this study does not allow for generalizations. Yet, it is hoped that the analytical method applied has helped to shed some light on the use of corruption-related conceptual metaphors across languages. A further study of the conceptualization of corruption in the media in Latvia may provide more useful insights into the universality of conceptual metaphors.

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TECHNOLOGY-ENHANCED COURSE IN ENGLISH THEORETICAL GRAMMAR AND PHONETICS AT THE TERTIARY LEVEL

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Abstract. The advancement of technologies and the recently forced lockdown by Covid-19 are bringing changes to the organisation of the learning process by accelerating the introduction of e-learning to create a learner-centred technology-based approach to English studies, thus stepping towards digital humanities. These trends initiated the institutional project Mobile and Desktop Software Integration in Bachelor and Master Study Programmes. The present study, using a questionnaire, elicits university students' attitudes to the mobile applications and speech analysis software-based seminar activities in Moodle e-course in accordance with the blended learning model selected for the studies of theoretical grammar and phonetics. It is a cross-sectional, focused, and exploratory case study, comprising a description of factors, contributing to the problem of blended learning model selection. The yielded data demonstrate that students do not possess extensive prior experience with the use of software and mobile applications to study English grammar and phonetics. After completing seminar tasks, they favourably account for the integrated blended learning materials and consider that those facilitate their learning process.

Key words: blended learning, learning management system (LMS), theoretical grammar and phonetics, digital tools

INTRODUCTION

The advancement of technologies and the recently forced lockdown by Covid-19 have led to the shift of the learning paradigm, change of teacher and student roles and a different organisation of the learning process. Authorities of higher education institutions have been actively introducing the elements of e-learning, mobile learning, flipped learning and blended learning delivering a variety of subjects, using these frameworks in order to create a favourable environment for a learner-centred approach. It ensures the access to educational resources through links, enabling the learners to create and share the content, thus, expanding the boundaries of the classroom. Moreover, there are mobile applications and

downloadable software that go beyond the functionality of learning management system (LMS) *Moodle*, as they are currently in focus of the English language grammar and pronunciation studies, so their integration is to be considered. The implementation of the mobile applications and downloadable software in English Philology Bachelor Study Programme and in particular in the studies of *English theoretical grammar and phonetics* is determined by limited functionality of LMS *Moodle*, transition from four to three years of Bachelor studies as well as the need to advance students' digital competence in humanities. To bridge this gap, the institutional project *Mobile and Desktop Software Integration in Bachelor and Master Study Programmes* was implemented to design the digital seminar tasks for the courses of these programmes including the course in question.

Prior to commencing the research, the following research question was formulated: What will be students' attitude to the introduction of blended learning model aimed to ensure the exposure to digital course materials and facilitate student involvement?

The goal of the research, therefore, is eliciting students' attitude to the mobile applications and speech analysis software-based seminar tasks designed and selectively integrated in *Moodle* e-course in accordance with the blended learning model selected for the studies of *English theoretical grammar and phonetics*. The obtained results serve as a cornerstone for further study course digitalization and introducing blended learning elements.

In order to reach the goal, the following enabling objectives were set: (1) to investigate and select the blended learning model for facilitating the learning of *English theoretical grammar and phonetics*; (2) to administer the pre-questionnaire in order to elicit information about the students' familiarity with the *Moodle* functions, mobile applications and downloadable software; (3) to create two sets of customized digital materials: one set of seminar tasks for mobile applications-based studies of theoretical grammar and the other set for speech analysis-based studies of theoretical phonetics. (3) to select the tasks from each set and integrate them in the *Moodle* component of the course within the limits of the seminar hours allotted in this course; (4) to elicit students' attitude to the integrated tasks by administering the questionnaire.

LITERATURE REVIEW

Blended learning has been shaped and developed by researchers and educators for several decades, therefore, the key theoretical considerations need to be established for the present research.

Blended learning mode is defined by scholars as an innovative concept the most characteristic aspect of which is an organic integration of relevantly selected face-to-face teaching approaches and online teaching (Moebs and Weibelzahl, 2006; Garrison and Vaughan 2008; Lalima and Dangwal, 2017; Linder, 2017). Linder (2017), considering the aspect of blending proportion,

explains that online component may vary, but should constitute at least 30 per cent. Linder (2017: 11) compares blended learning environments with traditional classrooms in terms of design and claims that blended courses require particular attention and alignment in the design stage to ensure that the face-to-face and online activities are organised efficiently to integrate different modalities. This integration is manifested at three levels (the first and the second level serve as a basis for course tailoring and content digitalization within the present study): (1) blending traditional and web-based classroom setup; (2) blending media and tools in learning environment; (3) blending various pedagogical approaches (Whitelock and Jelfs, 2003).

When selecting the blended learning model, Alammary, Sheard and Carboni (2014) propose three distinct design approaches: low-impact blend when extra activities are added to the existing course; medium-impact blend when activities are replaced in the existing course; high-impact blend when the blended course is built from scratch. The implementation of these design approaches in the present study are uncovered in the section *Setting and Blended Learning Model*.

Researchers (Terbeek, Cremer and van Klaveren, 2019: 2459-2466), who have carried out systematic literature review on the concept of blended learning, conclude that higher education institutions worldwide ‘place blended learning at the heart of their educational vision’. The mentioned researchers also emphasize the role, responsibility, commitment, skills, and knowledge of educators to integrate technology relevantly in the study process. The outbreak of the world pandemic has made the changes to the organization of the learning process even swifter and challenged higher education institutions by quick solution search and implementation. The blended learning has been diversified by the integration of technology that is (1) commonly used on daily basis – mobile applications and mobile phones and (2) purpose-specific software.

The growing significance of mobile learning and integration of mobile applications in language learning have been noted by researchers, highlighting benefits and deficiencies. Stockwell (2013: 201) has predicted and drawn attention to their role in the shift of ‘learning context from more formal settings to something that occurs as an accessible part of learning both in and out of classroom’. the application of mobile phones in education thus refers also to the infrastructure required for blending, so Grunewald Nichele and Zielinski do Canto (2018) draw attention to ‘Bring Your Own Device (BYOD)’. This uncovers the limitation regarding ‘the lack of policy support and governmental investment and the negative social attitudes of people towards mobile phones in the school environment (i.e. in Italy, Greece, UK) because of cheating, cyber-bullying, etc.’ (see Tsinnakos, 2013), infrastructure prior to introducing mobile technologies in the learning process and planning additional time and resources (Salaberry, 2001; Colpaert, 2004; Tsinnakos, 2013: 16). What concerns learning grammar, the scholars (Brown, 2009; Ligi and Raja, 2017) emphasize that the use of blended learning models diversifies task types, provide the functionality to

visualize the results, provide feedback, use different interaction patterns as well as encourage self-paced learning making learning possible any time anywhere.

The purpose-specific software (speech analysis tools) application in the instruction of phonetic aspects has been promoted by Busa (2007) who claimed that it might open a new perspective in pronunciation teaching. Traditionally, this software has been used in the research and description of acoustic aspects of phonetic features as described by Reetz et al. (2009/2020) and is widely applied in linguistic research. For example, Morris and Hejna (2020) have used *Praat* in their recent research in sociophonetics of pre-aspiration occurrence, duration, and noisiness in Welsh spoken in Bethesda (Gwynedd). Speech analysis software has been found useful by numerous studies in teaching suprasegmental and segmental aspects of pronunciation. Earlier research focused on technology-enhanced suprasegmental aspects such as pitch contour models of native speakers (e.g. Levis and Pickering, 2004; Hardison, 2004) and also more recent research (Yamane et al., 2018) the effect of viewing intonation contours created in *Praat*. Speech analysis software benefits in teaching segmental pronunciation aspects and the use of visual feedback in their teaching have been described by researchers (e.g. Olson, 2014; Okuno and Hardison, 2016), which have been summarized by Yoshida (2018).

However, there is considerably little research devoted to speech analysis blending modes in LMS. Wilson (2009) has addressed blending by involving students in the activity that coupled *Praat*-based practice of aspiration with the provision of instant feedback in LMS *Moodle*. Students self-measured their voice onset time (VOT) in *Praat* and then used LMS *Moodle* choice activity for reporting about their range of VOT. This enabled to track the students whose aspiration measures were outside the normal range and provide individual feedback. Such blend, according to blend levels suggested by Whitelock and Jelfs, (2003), displays low to medium impact. Similar approach to blend mode has been applied (see Luo, 2016) in the experimental study that explored the blending of peer assessment homework in LMS *Blackboard* for improving students' pronunciation performance, in which feedback was in a form of a textual comment. High-impact blend mode has been applied by Yan et al. (2018) who have used a specific web-based platform of two modules: an adaptive training module and peer review module for EFL pronunciation training embracing segmental and suprasegmental features thus applying high impact blend mode.

To conclude, blended learning models is a combination of a face-to-face instruction with online mode of delivery. It is defined by higher education institutions as a part of their vision. Blending presupposes the combination of traditional and virtual classroom setup, mixture of media and tools as well as a synergy of pedagogical approaches. It may be of a low, medium, or high impact. Digitalisation may occur at a course level, when online element is an integral part of the study process, for instance due to confined teaching hours. It may also be seen at a task level, when blending happens on case-to case basis and methodologies pursue different aims, e.g. student engagement.

RESEARCH METHODOLOGY AND SUBJECTS

The present paper reflects a part of ongoing research regarding the implementation of digital tools in Bachelor and Master Study Programmes in English Philology, which was initiated in 2018 as an institutional project. As a result of it, digital seminar tasks were designed and piloted. The present paper is cross-sectional research, as defined by Dörnyei (2007), employs focused and exploratory case study as a research method (2005). It includes the selection of the blending model for introduction of digital tools-based tasks within the course of *English Theoretical Grammar and Phonetics* and eliciting students' attitude as a reaction to blending model introduction thus aimed to answer the research question listed in the introduction. This research method was selected as the research comprised a description of subjects and factors contributing to the problem of blended learning model selection for seminar task design and dealt with collecting the opinion of the sample rather than proposing the ultimate solution.

The questionnaires were used as data collection tools in order to obtain data on students' prior experience of digital materials use and elicit the students' attitude to the digital seminar tasks designed for the studies of theoretical grammar and phonetics.

The research subjects comprised 40 students (30 full-time and 10 part-time) whose prior experience in using mobile applications and downloadable speech analysis software *Praat* in learning English grammar and phonetics was explored by administering questionnaires. In further steps of the study the number of research subjects comprised those 28 Bachelor Study Programme full-time (20 students) and part-time students (8 students), who had registered for the course of *English Theoretical Grammar and Phonetics*.

PROCEDURE

The research commenced with the theoretical framework review and the selection of the blended learning model to facilitate learning theoretical grammar and phonetics by integrating the customized digital materials (mobile applications and downloadable software). It continued with administering the pre-questionnaire (see Appendix 1) in order to elicit information about the students' familiarity with the *Moodle* functions and mobile applications and downloadable software. Further, two sets of customized digital materials: one set of seminar tasks for mobile applications-based studies of theoretical grammar and other set for *Praat*-based studies of theoretical phonetics were created and piloted within the framework of the institutional project. The tasks were selected from both sets and integrated in the *Moodle* component of the course within the limits of the seminar hours allotted to the mentioned course. The tasks were integrated into *Moodle* through its affordances and used as low and medium impact blending. Finally, students' attitude to the integrated tasks was elicited by administering the questionnaire.

SETTING AND BLENDED LEARNING MODEL SELECTION

The selection of blended learning model comprised three steps. First, after the review of the secondary sources on the fundamentals of blended learning, the setting referring to the institutional prerequisites was considered. The study process organization at the University of Latvia, as described in Karapetjana et al. (2016), which is strongly supported by Student Council, includes the requirement to digitalise courses. It means more active use of LMS *Moodle* in full-time and part-time studies, thus increasing the exposure to the subject matter and student involvement. In addition, such digitalization enables the addressing operational costs, including the use of facility, printing, and publishing expenses. Meanwhile, there was a scarcity of digital resources in the *Moodle* component of the course *English Theoretical Grammar and Phonetics* that called for the integration of relevant tools and transition to blended modality. This was the reason why the course *English Theoretical grammar and Phonetics* was in the focus of the second stage of the institutional project *Desktop Software Integration in Bachelor and Master Study Programme* immediately after the completion of the first stage of the project – the seminar task design for normative courses the results of which are presented in conference proceedings (Kuzmina, 2019; Vincela, 2019).

Second, the pedagogical implications were considered to align the functionality of blended model with the aim, objectives, and content of the course. The umbrella aim of the course is to view *English Theoretical Grammar and Phonetics* in the context of other branches of linguistics. Course objectives focus on the specific features of theoretical grammar and phonetics. Thus, the component of the theoretical grammar discusses English as an analytical language outlining the key grammatical features. The traditional accounts on parts of speech are presented drawing their semantic, morphological, and syntactic peculiarities. The review of grammatical categories involves a correlational analysis of grammatical forms and meaning. The course component of the theoretical phonetics provides an insight into the segmental (sound structure) and suprasegmental (accentual structure, syllabic structure, intonation) aspects of English, introduces problems of phonetic and phonemic investigation of English with an emphasis on the pronunciation latest developments. These course content aspects are fundamental for English Philology undergraduate studies, as it is a pre-requisite in syntax acquisition and sociophonetics acquisition at the Master's level. Therefore, the specific grammatical and phonetic features that are in the focus of the mentioned course objectives framed the content component of the blended learning model comprising digitalized seminar activities.

Third, the differences between full-time and part-time programme studies were considered. The main difference is the number of contact hours. In full-time studies there are 64 contact hours, whereas 16 contact hours are envisaged for

part-time studies, which are compensated by independent work. Another point is the humble number of hours allotted to seminars (two hours devoted to grammar and two to phonetics). It implies that historically the course was delivered by using teacher-centred approach with little student involvement. Due to these nuances, blended learning design approach, which is outlined in Table 1, differs for full-time and part-time modes of studies according to the level of blending. Low impact or activity level blend was selected for full-time course, whereas medium-impact or course level blend for part-time course.

Table 1 Blending of materials and activities

Low impact blend, full-time studies		Medium impact blend, part-time studies	
Digital informative materials			
Purpose	Mode	Purpose	Mode
Facilitate content coverage	<i>Moodle</i> availability (various format files, created online pages)	(a) Facilitate content coverage (b) Compensate for contact hours	<i>Moodle</i> availability (various format files, created online pages)
Digital activities			
Tasks of activities	Mode	Tasks of activities	Mode
Introductory task	Technology-based face-to-face	Introductory task	Technology-based face-to-face
Core task 1	Technology-based face-to-face	Core task 1	Online, integrated in <i>Moodle</i>
Core task 2	Online, integrated in <i>Moodle</i>	Core task 2	Online, integrated in <i>Moodle</i>
Follow-up	Face-to-face discussion	Follow-up	Online discussion integrated in <i>Moodle</i>

Low-impact blend envisaged the alternation of face-to-face and mobile applications and speech software-based tasks of the activity that was integrated in *Moodle* component of the course by applying LMS affordances (e.g. links and assignment functions). They aimed at the promotion of interactive, learner-centred acquisition of course content by complementing the digitalized informative materials. As to part-time studies, course level blend was selected as relevant. First, the purpose of course content-based digital informative materials was not only to facilitate but rather compensate contact hours, which accounted for their amount in the *Moodle* component for part-time studies. Second, as it is observable in Table 1, online component throughout the digitalized activity tasks was dominating in comparison with face-to-face component.

PRE-QUESTIONNAIRE

Before the software choice and seminar task design, it was vital to acquire the data uncovering the students' prior experience, which was explored by administering a questionnaire. The aim of this pre-questionnaire, consequently, was to elicit students' prior use of LMS *Moodle* functions as well as their familiarity with mobile applications and speech analysis tools – the core software for the design of the activities (see questionnaire in Appendix 1).

The pre-questionnaire was filled in by 40 students among which 8 students (20%) were the first year and 32 (80%) the second-year students who accordingly had not experienced the course in English theoretical grammar and phonetics. They were offered the multiple-choice questions to find out what functions of LMS *Moodle* they had already used throughout their studies (see Table 2). The answers revealed that the students had predominantly used LMS for exercises, self-tests as well as getting acquainted with the new material. These results implied smooth transition to blended modality as far as it would involve familiar functions of LMS. However, LMS was less used by the students for their communication with peers. The data in Table 3 shows the students' generally positive (55%), however, also mixed attitude, answers 'maybe' and 'don't know', (42.5%) to LMS *Moodle* functions they were familiar with.

Table 2 LMS Moodle functions used by students (N=40)

LMS Moodle functions	Number of students	%
The presentation of new material	32	80
Exercises	37	92.5
Self-tests	28	70
Wiki	15	37.5
Glossary	18	45
Online tests	26	65
Communication with peers	13	32.5
Communication with teaching staff	21	52.5
Other (please specify)	0	0

Table 3 Usefulness of LMS Moodle (N=40)

Do you find it useful in your studies?	Number of students	%
Yes	22	55
No	1	2.5
Maybe	8	20
I do not know	9	22.5

In addition, the students were offered to answer which of the mobile and desktop applications they had already used in language studies. It was found that 62 per cent of them had applied *Kahoot* and 47.5 per cent *Quizlet* in their studies, whereas only a few students had used such applications as *Seesaw* (2.50%) and *Plickers* (2.30%). Voice recorders had been used in language studies by 42.38 per cent of the students, whereas none of them was familiar with the application of speech analysis software *Praat* in language studies.

The elicited prior experience of the students was a significant component of practicality criterion that was considered in the choice of software and the activity design.

SOFTWARE SELECTION

Once the blended learning model for the digitalized seminar task integration was selected and students' prior experience and preferences as to LMS *Moodle* functions collected, the next stage was software choice. It was performed according to the criteria proposed by researchers (see Yoshida, 2018; Terbeek et al. 2019: 2466; Grunewald Nichele, Zielinski do Canto, 2018; Kuzmina, 2019) who have suggested viewing software features (functions, practicality including students' familiarity with the software) in relation to course objectives.

Software functionality was viewed in the context of the course *English Theoretical Grammar and Phonetics* content and objectives. The functionality of the mobile applications *Quizlet*, *Kahoot*, *Quizalize* and *Classrooms.net* were selected as relevant affordances for the digitalized tasks aiming at grammatical categories that are outlined in the course objectives. As to the coverage of phonetic aspects of the course, the affordances of speech analysis software *Praat*, which was created by Paul Boersma and David Weenink, are relevant to address segmental and suprasegmental phonetic features outlined in the course objectives.

Practicality of the software was viewed from two angles, its accessibility and students' familiarity with the software as they have reported in pre-questionnaire. The mobile applications *Quizlet*, *Quizalize*, *Kahoot! mobile apps* were viewed as relevant for teaching theoretical grammar, because they are open software and comply with the students' previous experience elicited by the pre-questionnaire. In the process of analysis, it was concluded that the features of *Classrooms.net* resources are also relevant to the subject matter and may be considered in further research. Speech analysis software *Praat* meets practicality as it is conveniently downloadable open software. However, the pre-questionnaire revealed that *Praat* was completely unfamiliar to the students irrespective of the contemporary growing and diversifying use of technology. However, the relevance of *Praat* functionality to course content and objectives is a significant factor for its application. Therefore, it was decided to apply it, however, envisage the familiarizing stage with *Praat* functions that would be required for the completion of a particular stage of the task. In addition, the availability of tutorials was envisaged to provide additional support regarding the functions of

this software. The students' familiarity with LMS *Moodle* functions, according to the pre-questionnaire results, was another technology-based precondition towards piloting of the tasks and blended mode implementation.

To conclude, the selection of tools for blending was based on a set of criteria that was observed, the primary being the correspondence to the learning objectives alongside with further considerations of software functions and pre-questionnaire implications. Pre-questionnaire results by informing about the students' familiarity with mobile application and speech software prepared the set-up for the task design and implementation. The mobile and web-based applications and speech analysis software *Praat* were selected for creating seminar tasks within the framework of the studies of *English Theoretical Grammar and Phonetics* to shift the traditional face-to-face, lecturer-centred instruction by expanding the online mode of delivery.

TASK DESIGN

Task design has been performed taking into consideration course goals and functionality, practicality and students' familiarity with this software. The mobile-application and speech analysis software task design occurred alongside with the transformation of the study programme from four to three years of studies and the promotion of student-centred studies by the increasing of seminar hours in the course. This complied with the project *Mobile and Desktop Software Integration in Bachelor and Master Study Programmes* goal, and therefore a package of seminar activities was designed serving multiple purposes, i.e. for programme transformation and as a practical guide for the implementation during COVID-19 forced remote work.

The summary of the digitalized activities devoted to grammatical categories is included in Appendix 2, Table 5. It is important to note that the functionality of the applications goes beyond the functionality of LMS, thus complementing it. They were designed complying with the course objectives and following the framework outlined in Table 1. They were used to make students acquainted with the terminology (Introductory task with Quizlet), facilitate pair-work and group-work (Core task 1 with Classroom.net), create self-tests (Core task 2 with Quizalize) and mock-test (Kahoot!). The discussion was organised face-to-face using the visualisation of results with full-time students and in *Moodle* with part-time students. The major difference between the LMS functionality for test creation and the selected app is simple in-built algorithm for data analysis to evaluate students' mistakes and propose extra exercises (*Quizalize*) as well as foster cooperative learning (*Classroom.net*, *Kahoot!*). Such task setup accounted for low impact blending model in full-time studies and medium-impact blending model in part-time studies.

The thematic summary of the digitalized seminar activities devoted to phonetic aspects is included in Appendix, Table 6. Each of the designed activities

follows the blending mode framework presented in Table 1 and comprises four tasks. The introductory task of each activity, which is face-to face for full-time as well as part-time students, offers a concise overview on the pronunciation aspect included in this task. It also includes the demonstration and practice of *Praat* functions. Core task 1 of each activity is devoted to the observation and analysis of an example of pronunciation aspect the activity is devoted to. In the case of low-impact blending core task 1 is technology-based face-to-face task; however, in the case of medium-impact blend core task 1 is performed online by applying *Moodle* functions (assignments, embedded instructions, links to software and feedback in *Moodle*). Core task 2 of each activity envisages individual work at observation of speech samples with the help of *Praat* and documentation of the obtained results. Core task 2 is fully integrated in *Moodle* through assignment functions and embedded links, irrespective of the blend level. The follow up task is devoted to the face-to-face discussion in low-impact blending, whereas online discussion – in the case of part-time studies, i.e. medium level blend.

The seminar hours of the course *English Theoretical Grammar and Phonetics* allowed the piloting of three activities, so two mobile application-based activities aiming at grammatical categories and one speech-analysis based activity devoted to phonetic aspects were selected for piloting.

PILOTING

The selection of the tasks for piloting was matched with the available seminar hours. Therefore, two mobile-application based activities and one *Praat*-based activity were selected for piloting.

The number and types of activities, alongside with the students' prior experience as to the use of mobile application and speech analysis software, strongly depends on the number of seminar hours that can be devoted to the activity level component of blended studies.

1 PILOTING ACTIVITIES IN QUIZALISE, KAHOOT! AND QUIZLET

To meet the needs of theoretical grammar, *Quizalize*, *Kahoot!* and *Quizlet* apps were selected. The first stage of the task was familiarisation with the concepts of open and closed parts of speech as well as their syntactic roles. Following this, the students were provided with electronic flash cards in *Quizlet*, covering the key terminology. Later on, the same terminology was integrated into multiple choice and cloze exercises. Finally, the students were encouraged to complete a matching task set up as an online game with a follow-up discussion. This activity setup enables the teacher to generate various activity types, having in the basis the same terminology for the students to master as well as minimise time, resources and increase students' involvement.

The *Quizalize* and *Kahoot!* apps were used to design multiple choice tests as a midterm and mock test before the examination. The full-time students were encouraged to do it in class with a follow-up discussion, whereas for part-time correspondence students it was assigned for independent study, which is determined by the number of contact hours. The back-end of the functionality of the software enabled the teacher to see the detailed activity performance conditions, e.g. The number of attempts students undertook, time required how their progress has increased as a result of multiple attempts as well as automatically assign additional tasks to work with weak points, visualising the statistics, which are supplementary features to those available in *Moodle*. The functionality of the selected software is well suited to compensate to the gap in contact hours between two study modes. A follow-up discussion was organised in *Moodle*.

2 PILOTING OF PRAAT-BASED ACTIVITY

Activity 1 (see Appendix Table 2) devoted to the *Praat*-based observation of British English vowels was selected for piloting the low-impact and medium-impact blend models (see Table 1). Two seminar hours were devoted to this activity for full-time students and one seminar hour for part-time students. The introductory task was covered during the face-to-face seminar hour in full-time and part-time studies. During this activity, the acoustic properties of vowels, were introduced and discussed, respectively formant 1 (F1) and formant 2 (F2) variations, depending on gestures. Students were also familiarized with the functions of *Praat*, which they would require for core task 1 and core task 2 – formant measurement extraction. They also practiced these *Praat* functions to gain confidence in their application, and, if necessary, ask for clarifications. Core task 1 included full-time students' in-class work on the observation and discussion of the vowel acoustic features in the proposed examples. Part-time students performed core task 1 as an online assignment in *Moodle* (according to the task outline and links leading to the required resources) and they also received online feedback on it. In order to perform Core task 2, the students uploaded speech samples to *Praat*, then observed and documented the formant (F1) and (F2) values of vowels and compared their results with the results presented in literature. Core task 2 was performed and submitted online by full-time as well as part-time students by applying *Moodle* functions (assignments and embedded links). Online feedback was provided on the submitted assignments. Follow-up discussion of core task 2 results and insights were discussed with full-time students during their second face-to-face seminar hour, whereas *Moodle* discussion forum was used to manage the discussion online with part-time students.

A POST-QUESTIONNAIRE

After piloting the above-described technology-based seminar activities (two of them targeted at grammatical features and one at phonetic features), the attitude of 28 full-time and part-time students who got enrolled and completed the course was elicited with the help of Likert scales, commonly (see Rasinger, 2013) acknowledged as an effective instrument for measuring such an abstract concept as attitudes. The students uncovered their attitudes by indicating the agreement/disagreement with the statements displayed in Table 4 on a scale from 1 to 7, whereby 1 indicated total disagreement and 7 indicated total agreement. In addition, the option ‘don’t know’ was included.

The results referring to the first statement to elicit how the students viewed the piloted mobile (*Quizlet*, *Quizalize* and *Kahoot!*) and *Praat*-based seminar tasks were predominantly evaluated positively, as they considered that these tasks facilitated their learning process. The responses show that the students acknowledge the positive impact of the piloted tasks on the furthering of their acquisition of the course content (mean score for grammar 6.25 and 6.30 for phonetics). This attitude of the students is reinforced by the mode – the most frequent answer (14 total agreement answers for grammar aspects and 15 total agreement answers for phonetic aspects).

Table 4 Post-questionnaire (N=28)

Statements	Grammar (G) Phonetics (P)	Mean	1	2	3	4	5	6	7	Don't know
Course assignments facilitated the learning process	G	6.25	0	0	0	2	4	6	14	2
	P	6.30	0	0	1	1	3	8	15	0
E-course materials facilitated the learning process	G	6.52	0	0	0	1	3	4	19	1
	P	6.24	0	0	0	2	4	4	18	0
Teaching methods facilitated the learning process	G	6.19	0	0	1	1	5	5	15	1
	P	5.64	0	1	2	2	5	5	12	1
The tasks embedded in the course correspond to its description and objectives	G	6.54	0	0	0	1	2	5	18	2
	P	6.60	0	0	0	1	1	6	19	1
Academic staff was available for tutorials	G	6.55	0	0	0	1	1	5	15	6
	P	6.50	0	0	0	1	2	4	17	4

The second statement demonstrates positive attitude to the usefulness as to the materials that were included in e-course (6.52 is the mean of theoretical grammar and 6.24 – of phonetics, with the prevailing answer referring to the total

agreement). Similarly, the third statement reveals the favourable attitude towards teaching methods applied during the piloting. Meanwhile, these results provide grounds for more detailed observation of the answers. The obtained results allow noticing the nuances of the students' attitude that signals the caution of some students, for example, towards the way the activities are blended within the course. The elicited answers referring to the question devoted to the applied methods function as a reminder for the explicit methodological structuring, description and managing of each step of the digitalized activity. Meanwhile, the students have acknowledged the additional support availability in a form of tutorials that was especially crucial in the case of the task devoted to phonetic aspects as it required the application of specific functions of *Praat* that initially the students were not familiar with. The obtained results, therefore, form an insightful basis for the furthering of the blended studies model within the framework of the course.

CONCLUSIONS

The review of secondary sources revealed that when digitalizing activities for blended learning environment involving mobile applications and desktop software, institutional, technical, and pedagogical implications are to be considered. The obtained results confirm that a stepwise tailoring of the blended learning model, which rests on a range of aspects such as fundamentals of blended learning, institutional setting, teaching mode, course goal and objectives, software affordance (mobile applications, speech analysis software and LMS), and their synergy are preconditions to an applicable blending mode that can function for student-centred attainment of course objectives.

First, the process of the digitalized activity design which envisages the application of a range of software uncovered the topicality of the eliciting of the students' prior experience, irrespective of the currently expanding technology use on daily basis. The prior experience implications might be decisive in the structuring of activities and their time frame planning, depending on the blend level (low or medium impact blend). In addition, the knowledge of students' prior experience can save the frustration that students might encounter while discovering the function nuances of specific software during their independent work on tasks. The prior experience can be decisive and as this research demonstrates, having at the basis the results of the pre-questionnaire, students' digital experience was extended.

Second, the piloting results confirmed that the designed activities, from the students' perspective, can facilitate course objective attainment. It implies the selected framework applicability, i.e. blend level of the piloted activities (low impact blend for full-time studies and medium-impact blend for part-time studies), including such components as follow-up discussion (face-to-face or online) of the individually obtained conclusions, feedback, e.g. score,

the possibility to track their record or compare their progress against the peers; visualised feedback data. Once these pre-conditions are observed, it yields positive attitude of the usefulness of the digital matter.

Finally, the blending of the digitalized activities within *Moodle* component of the course confirmed the topicality of the shifting the proportion of course delivery hours towards increasing the seminar hours for attaining the institutional goal towards the digitalization and student-centred studies. The piloting process allowed to observe that on the one hand the blended learning mode activities promoted controlling, even investing in reducing of operational costs. However, on the other hand, during the implementation piloting revealed the topicality of a relevant, up-to-date institutional infrastructure for blending, i.e. computer labs, broadband connection, or students must bring their own devices.

The designed activities, their blending, piloting, and the obtained data allow their putting into practice and furthering institutional decisions by organizing the learning process in COVID-19 conditions that is experiencing unexpected changes when digitalisation has become compulsory.

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Tool

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APPENDIX 1 PRE-QUESTIONNAIRE

1. What is your gender?
 - Male
 - Female
2. What is your age?
 - 18–25
 - 26–35
 - over 35
3. Have you used Virtual Learning Environment (Moodle; WebCT, other) to practice grammar and pronunciation at university?
 - Yes
 - No
4. Do you find this learning environment useful?
 - Yes
 - No
 - Maybe
 - I do not know

5. What functions of VLE have you used at university?

- the presentation of new material
- Exercises
- Self-tests
- Wiki
- Glossary
- Online tests
- Online exams
- Communication with peers
- Communication with lecturers/teachers
- Other (please specify)

8. What functions did you lack?

9. What applications have you used in addition to VLE to study English grammar and pronunciation?

APPENDIX 2 SUMMARIES OF SEMINAR ACTIVITIES

Table 5 Summary of mobile application-based seminar activities

Software	Functionality and Procedure
<i>Quizlet</i>	It is a useful application to learn vocabulary as its features enable a teacher to create pairs for matching. However, in grammatical terms, it might be a way to teach definitions, match colligations or jumbled sentence structure. For instance, within the framework of the present study, it was used to design a matching exercise on parts of speech and their syntactic roles. It enabled the students to memorise the required terminology.
<i>Kahoot!</i>	It is an application which enables the teachers to create multiple choice tests with a time limit, which simulates or enables to automate test or exam environment. The tests are run in class and the answers are submitted via mobile phones creating competition spirit and enabling the students to track their progress on the screen. The drawback of this app might be the dependency on the broadband Internet connection especially for larger groups. Within this research it was used to run a mock test before a midterm test.
<i>Quizalize</i>	It possesses similar features to those of Quizlet and Kahoot! and enables teachers to make tests and set them in class or at home as an interactive online test adding pictures, if required. It also allows teachers to import questions from spreadsheet or Quizlet or integrate features with Google Classroom. Its advantage is having the basic data analysis algorithm, the software analyses students' mistakes and proposes extra exercises. In this study it was used to create an activity to practice verb patterns with the infinitive and gerund.

Software	Functionality and Procedure
<i>Classtools.net</i>	It is a desktop application which contains a mobile friendly version to create interactive games, for instance, create a crossword with terminology, turn a test into an arcade game (e.g. Pacman or races), Connect Fours to systematise or divide concepts into four groups. The disadvantage of the tools might be a lower quality graphics and a bigger screen might be required for some tools. However, if students may use tablets, the issue of the screen size is addressed.

Table 6 Thematic summary of *Praat*-based seminar activities

No	Theme of the activities	Outcome
1	Introduction to <i>Praat</i> -based visualisation of acoustic aspects of BrE monophthongs	Table filled in with the observed data concerning the quality of monophthongs (F1 and F2 values) in the observed spectrograms of BrE speech samples
2	<i>Praat</i> -based research of the quality of the selected monophthongs in the selected English accents	Table filled in with the observed data concerning the selected monophthong quality (F1 and F2) in the observed accent samples. The obtained data comparison with the data obtained about the quality of BrE monophthongs
3	Introduction to <i>Praat</i> -based visualisation of voice onset time (VOT)	Table filled in with the observed visual data available in spectrogram view concerning BrE consonants that are included in the task: VOT, visualisation of presence/absence of voicing
4	<i>Praat</i> -based research of linking <i>-/r/</i> , intrusive <i>- /r/</i> in rhotic and non-rhotic accents	Transcribed speech samples arranged according to rhotic/non-rhotic accents and the presence/absence of <i>/r/</i> .

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INTERTEXTUALITY AND ARTHURIAN WOMEN IN DAVID LODGE'S *SMALL WORLD* (1984)

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Abstract. The present article analyses intertextual references in David Lodge's *Small World. An Academic Romance* (1984), focusing on allusions to the corpus of medieval and twentieth-century Arthuriana in the representation of women characters. An analysis of Arthurian allusions in the portrayal of women characters shows that Lodge introduces Arthurian women to his academic 'Camelot' in response to medieval and post-medieval literature about King Arthur and the Grail quest. In this respect, his representation of academic women in *Small World* is different from the way they are described in Lodge's other academic novels, *Changing Places* and *Nice Work*. Lodge rarely recasts Arthurian women characters as his heroines with the exception of Prof Fulvia Morgana, who is modelled on the Arthurian sorceress Morgane/Morgause. Nevertheless, in *Small World*, women appear in the traditional roles of being the object of a 'knight's' quest, such as Persse's beloved Angelica and Swallow's lover Joy, and wise advisors (Miss Maiden). Alternatively, women are portrayed as antagonistic or negative characters, the so-called 'whores' or 'demonic temptresses': such are Angelica's twin sister Lily and the lusty Fulvia Morgana.

Key words: David Lodge, academic romance, intertextuality, Arthuriana, Arthurian women, Grail quest

INTRODUCTION

Lodge's women characters in *Small World* are best understood in the context of his reliance on intertextuality and stylistic innovation and experimentation. Thus, it is useful to discuss his fiction in the context of his scholarly work, as his innovative, experimental style of fiction puts into practice the schools of thought, critical approaches and literary movements discussed in his critical studies. As Lodge himself explains in the collection of essays *the Novelist at the Crossroads*, he purposefully aimed at alternatively writing works of literary scholarship and novels (1971: 26). His novels also draw, to a certain extent, on Lodge's own experience for the depiction of settings, events, atmosphere and problems. Thus, his early novels *Out of the Shelter* (1970) and *Ginger, You Are Barmy* (1962) are

inspired by, respectively, his childhood experience in the Blitzkrieg London and his brief service in the army. Another early novel, *the British Museum is Falling Down* (1965), is a pastiche of different literary styles, imitating – or parodying – the works of famous twentieth-century writers, including James Joyce's *Finnegan's Wake* (1939). The problem addressed in the novel is, however, far from a trifling one, as it explores, in a comic manner, the issues of parenthood and family planning from the perspective of an impoverished doctoral student, who, like Lodge himself, is a Roman Catholic. The controversy over sex and contraception, which were very topical for a practicing Roman Catholic like Lodge, are tackled more seriously in *How Far Can You Go?* (1980), where using the so-called 'safe method' (measuring bodily temperature and following a calendar as a guide when it is safe to have sexual intercourse) leads not only to the arrival of several unplanned children, but also to the birth of a child with the Down syndrome, an episode based on his own experience (Lodge, 2015: 409). Roman Catholicism and its doctrines, particularly the church emphasis on sexual purity and the absence of sex outside marriage, is a theme that recurs in many of Lodge's later novels, including *Paradise News* (1991) and *Small World*.

Small World, often published as the second part of Lodge's 'campus trilogy' (a term problematized by Mews, 1989: 713-6), engages many of the same concerns as his earlier novels and shares with them a number of stylistic similarities, including 'experiments with narrative technique, parody, and stylization of language' (Perkin, 2014: 54). It differs from the first part of the 'campus trilogy', *Changing Places* (1975), which is a story of two university professors changing jobs – and wives – for the duration of their academic exchange programme. *Changing Places* is written using a variety of narrative techniques, including the letter, newspaper cuttings and the film script. The third part of the 'campus trilogy', *Nice Work* (1988), is a workplace romance, which describes a time of political unrest and the challenges of capitalism from the perspective of a female scholar of literature, 'a left-wing feminist academic who lectures in English literature and is thoroughly versed in poststructuralism' (Fokkema, 1991: 13). The three novels of the 'trilogy' are very distinct in terms of forms, themes and characters, yet have the unity of place – a fictionalized version of the University of Birmingham, where Lodge has worked throughout most of his academic career (Lodge, 2015). Also, the major characters of *Changing Places*, Prof Philip Swallow and Prof Morris Zapp, as well as their wives, reappear in the second and third novels of the trilogy, albeit not as the main characters any longer.

What makes *Small World* so unique among Lodge's works is not only his comical depiction of the academic world, but also his engagement with works and motifs of medieval literature, which are otherwise absent from Lodge's criticism and fiction. Lodge manages to highlight the similarities between the academic world and the world of chivalry: both are elite, male-dominated societies (the latter was true at least in Lodge's own time, if not any longer), with highly competitive, socially and geographically mobile members. Both the knights of medieval romance and Lodge's academics travel extensively in search of fame and

glory – as well as academic grants and promotions, in the case of the academics. Indeed, it can be argued that the real medieval knights' peregrinations were motivated by very similar pragmatic objectives, if the case of William Marshal, the famous knight who spent most of his life in tournaments, jousts and on campaigns, is to be taken as indicative (Duby, 1985). As Lodge was a scholar of modern English literature, his interest in the Arthurian romance is all the more curious, but it can be explained by the fact that Arthurian romance made a dramatic reappearance in modern and post-modern fiction and contemporary popular culture.

David Lodge subtitled his campus novel *Small World* (1984) an 'academic romance', thus introducing a certain set of literary allusions and intertextual references his audience can enjoy. One of the common associations that the word 'romance' invokes in the reader is chivalric romance. In his essay 'Fact and Fiction in the Novel', Lodge explains that the subtitle of *Small World*

plays on the recognized genre-term 'academic novel' and also indicates what kind of romance is invoked – not the Mills and Boon kind, but the kind studied and loved by academics: Heliodorus, the stories of King Arthur, the *Faerie Queene*, *Orlando Furioso*, the late plays of Shakespeare, and so on. (Lodge, 1996: 24)

The medieval 'stories of King Arthur', collectively known in scholarship as the Arthuriana, are mostly built around the motif of a chivalric adventure or quest, and this motif is likewise prominent in some of the early modern works, notably the *Faerie Queene* and *Orlando Furioso*. Indeed, Lodge makes a quest, one of the common motifs in chivalric romance, the *leitmotif* of *Small World*. In this novel, literature scholars are likened to Arthurian knights in their relentless, often obsessional pursuit of their own version of the Holy Grail. The meaning and identity of this Holy Grail, however, may vary depending on the quester's agenda. Most academics strive for the Holy Grail of academic career, the UNESCO chair in literature studies. Meanwhile, Persse, a young and romantic Irishman, is pursuing his own private Grail: he does not seek academic prestige and a lucrative position, but a girl, Angelica. Albeit the academics' quest for the lucrative UNESCO chair may appear ephemeral as compared to the medieval Grail quest, which is an essentially spiritual undertaking, the other quest, that for a beautiful girl, is only superficially more chivalric.

Overall, *Small World* is structured on the model of a chivalric quest (the Grail quest), a common form in medieval Arthurian romance. The characters of *Small World* are academics, and they, in particular the university professor Philip Swallow and Morris Zapp, are cast in the roles of medieval knights (Ropa, 2016). In medieval Grail quest romance, particularly the anonymous early-thirteenth-century *Queste del Saint Graal* and Thomas Malory's fifteenth-century adaptation of it in *Le Morte d'Arthur* as the 'Tale of the Sankgreal', the questing knights are urged to leave behind all earthly aspirations and interests, and it is particularly stressed in some of the texts that they should be virgin in thought and body

(Pauphilet, 1923; Malory, 1990). Indeed, the protagonist Persse MacGarrigle in Lodge's novel is presented as a comic naïve young Irishman, who chases a girl, Angelica, who, like him, is a young scholar of romance, on a round-the-world tour of academic conferences, all the while imagining himself to be in love. Initially, he is virgin in body, but, like his namesake Sir Perceval in the *Queste del Saint Graal*, he loses his spiritual purity in the course of the quest. Early on in romance, Angelica invites Persse to a *rendez-vous* in her room: before coming to Angelica's room, he goes to the drugstore to buy condoms. By doing this, he mentally renounces his principle of abstaining from premarital sex, but it turns out Angelica has played a practical joke on him, and the room she indicated was not her room. Thus, Persse stays a virgin in terms of the absence of physical experience, but he is no longer a virgin in mind. By the end of the novel, Persse loses his physical innocence, too, when he has sex with Angelica's twin sister Lily, whom he takes for Angelica. This detail highlights the similarity between Persse and yet another knight of the medieval *Queste del Saint Graal*, Sir Bors, who loses virginity, because he is deceived.

THE GRAIL QUEST FROM THE MIDDLE AGES TO THE PRESENT DAY

The Grail quest motif made first appeared in Arthurian romance – that is, medieval literature centering on the court of King Arthur – at the end of the twelfth century in the work *Perceval, ou la queste del saint graal* of the French poet Chrétien de Troyes. The poem casts a naïve, uneducated young nobleman, Perceval, as the protagonist of a lengthy series of adventures, including the Grail quest, which would result in Perceval's initiation into the world of courtly chivalry. While the poem was left unfinished by Chrétien, several French authors, giving the origins and meaning of the Grail and Perceval's adventure, wrote continuations and a prequel. The German poet Wolfram von Eschenbach, who worked at around the same time as Chrétien, also wrote a verse romance about the Grail quest, *Parzival*, the early part of which is very similar to Chrétien's narrative. In the British Isles, Perceval was known through two vernacular works, the Welsh *Peredur*, which survives as fourteenth-century versions of the Mabinogion cycle, and the anonymous Middle English *Sir Perceval of Galles*, which was written in the early fourteenth century. Both recount the adventures of an innocent and ignorant young man, yet neither of the two features the Grail quest (Braswell, 1995; Lovecy, 2013).

In the early thirteenth-century France, the stories of King Arthur were developed into a lengthy prose cycle, known as the Vulgate cycle or the Lancelot-Grail cycle. The latter name reflects the subject matter of this sprawling cycle authored by several unknown writers. Indeed, the major part of the cycle is dedicated to the adventures of Arthur's best knight, Sir Lancelot, and to the prehistory of the Holy Grail and its quest. These romances were known

in England and Wales, as references to copies of the French text were found in medieval inventories, and some of the medieval manuscripts produced in England survive to this day (Middleton, 2003: 219). Meanwhile, most of the late-fifteenth century and early-sixteenth century English readers, and English-speaking readers today, know this material from its reworking into Middle English by Sir Thomas Malory, *Le Morte d'Arthur* (1485). It served as the basis for Sydney Lanier's 1880 illustrated adaptation for juvenile audiences, *the Boy's King Arthur*, and it is likely to be this or similar version that Lodge recollects having read as a child (Thompson, 1999: np).

Thomas Malory has often been criticized for his misogyny in portraying women characters in the *Morte*, but, as Kaufman convincingly argues, Malory's representation of women should not be read through modern lenses of gender equality (Kaufman, 2019). Neither should the representation of women in Malory's sources be ignored. For the Grail quest, narrated in the 'Tale of the Sankgreal', Malory followed closely the text of the anonymous French prose romance *La Queste del Saint Graal* (Norris, 2008: 114-118). In turn, the *Queste* has often been described as a very misogynist romance because the participation of women in the quest is prohibited from the very first pages (Ribard, 1982). The *Queste* includes a number of demonic damsels, who are in fact devils disguised as attractive noble women, who hinder the questers, and whose presence adds to the impression that the author of this romance is wary of the sexual attraction that women can exercise over men (Burns, 1998). Horowitz even goes as far as to argue that *Queste* only has two kinds of women: angelic virgins and demonic whores (Horowitz, 1995). Still, there is at least one woman, who is a virgin and sister of one of the three elect knights who succeed in the quest, Sir Perceval. Perceval's sister has been the subject of numerous studies, many of which focus on the fact that she dies before achieving the Grail, which seems to confirm the statement that the *Queste* author is prejudiced against women as questers (Unzeit-Herzog, 1990; Arenstein, 1992; Traxler, 2000).

On the other hand, the body of Perceval's sister does reach the Grail, so, symbolically, this woman achieves the quest, too. Moreover, other women characters in the *Queste* and Malory's *Morte* play an important role in the Grail quest, too, acting as guides and advisors to the questing knights: there are religious women, most notably recluses (Ropa, 2016), who advise the questing knights, as well as the ambiguous wife of King Solomon, an ancestor of one of the questing knights, who likewise acts as a guide (Ropa, 2019). In Lodge's *Small World*, women also often appear in the roles of sexually attractive temptresses (Lily), angelic virgins (Angelica) and wise guides (Miss Maiden), all of whom are essential for Persse McGarrigle's own quest. The categorization of women characters in *Small World* is often less clear than in medieval romance, but Fulvia Morgana is at least one example of an evil and sexually deviant sorceress modelled on the sisters Morgan and Morgause of Arthurian literature.

During the early modern period, chivalric romance went out of fashion, and, with the exception of Edmund Spenser's *Faerie Queene* (1590–1596), few notable works of Arthurian literature or art were produced until medieval culture came into fashion again in the late eighteenth and early nineteenth century with the Romantic Revival. Works of Arthurian literature were edited, published and studied, and Arthurian romance gave rise to works of literature, art and music.

At the turn of the nineteenth and twentieth century, scholarship focused not only on editing medieval texts, but also on discovering parallels between medieval literature and folklore. Frazer's *Golden Bough* (1890), though it does not examine Arthurian romance or the Grail quest, is critical in this respect, as Frazer's work was one of the defining influences behind Jessy Weston's study of Arthurian romance, *From Ritual to Romance* (1920), which, in turn, left an imprint on the early twentieth-century criticism, literature and art. Thus, the English poet T. W. Rolleston wrote the poem *Parsifal*, which, although it claimed to have been inspired by Celtic literature, seems to have been directly influenced by Wagner's famous opera *Parsifal* and repeated the dichotomy between a pure, virtuous and virgin maiden who is the hero's destined bride and the fallen woman Kundry, both of which were, in Weston's thinking, avatars of the same pre-Christian goddess (Ropa, 2018). Weston believed the main themes of the Grail quest romances to originate in ancient, pre-Christian literature, with emphasis on the union between the god and the goddess, whereas the Grail cup or chalice and the bleeding lance of the Arthurian romance (the lance of Longinus in the Christian tradition) are symbols for the female and male sexual organs. This work was later popularized in the theory of the Triple Goddess motif, which was found not only in romance, but also in folklore: the Triple Goddess is a collective notion for different manifestations of femininity, the virgin, the sexually fertile woman (mother or wife) and the no longer sexually fertile woman (the crone).

Weston's work was cited by T. S. Eliot in *the Wasteland*, where he even referenced Weston's study. Lodge not only knew Eliot's work very well, but even made the protagonist of *Small World*, a young Irish scholar Persse, write his thesis on Shakespeare and Eliot. What is more, one of the characters of *Small World*, Miss Maiden, is a disciple of Weston, who interprets every historical work of literature or art, as well as of popular culture, in terms of phallic and vaginal symbolism, making the virginal Roman Catholic Persse blush. The ideas about the roles, functions and portrayal of women characters in the Grail quest romances, introduced by Weston and creatively reworked by Eliot, have influenced Lodge's characterization of women in *Small World*. While women may be represented in a variety of ways in Arthurian literature, the women characters of *Small World* can be analyzed using pattern of the Triple Goddess: the virgin, the wife/mother (also the whore) and the crone. For the purposes of Persse's own quest, for instance, Angelica is the virgin, Lily is the whore and Miss Maiden is the crone. Other women characters likewise include one or more features of the Triple Goddess, with Joy being the 'wife' for Philip Swallow and Fulvia Morgana the whore for Morris Zapp.

LODGE'S REMAKING OF MEDIEVAL ROMANCE AND MODERN ARTHURIANA

Strange as it may be, the inspiration behind Lodge's idea to frame his 'academic romance' as a quest came not from his knowledge of Middle English literature, although he acknowledges his familiarity with such works as Geoffrey Chaucer's *Canterbury Tales*, *Havelok the Dane* and *King Horn* (Thompson, 1999: np), but from popular culture. In fact, the twentieth century saw the flourishing of Arthuriana in a new media, the cinema. One of the most famous – if not the most sophisticated – works of Arthurian cinema is Boorman's film, *the Excalibur*. The film is ostensibly based on Malory's romance, though it only uses the names of Malory's characters, treating the plot in a very free manner: Davidson notes that 'Boorman is somewhat dismissive of Malory, even though the film announces itself as based on Sir Thomas Malory's book' (Davidson, 2007: 68). Boorman's interpretation of the rise and death of King Arthur is indirectly inspired by Weston, with her emphasis on the magical powers of the queen (Boorman's Morgause) and her sexuality, with the king's sexual impotence resulting in the land falling into chaos and turning into the wasteland. It would be misleading to assume that Lodge's information about the Grail quest comes from Boorman's *Excalibur*, which is very loosely based on the medieval Arthuriana. Meanwhile, Lodge acknowledges that the inspiration to structure his novel-in-progress along the lines of a chivalric quest came from watching the film:

[i]n spite of the slightly absurd style of the film, I was reminded again what a tremendous story the Arthurian legend is. It's quite powerful. Then it struck me that here was a story which could provide the mythic skeleton or underpinning necessary to give shape to my modern comedy of academic manners. (Thompson, 1999: np)

In *Small World*, David Lodge approaches the Grail quest not only as a novelist but also as a literary critic and academic, though not a medievalist. In drawing his women characters, Lodge includes a variety of literary allusions in the novel, referring to medieval romances – Chrétien de Troyes's, notably *Perceval, ou la Queste del Saint Graal*, and Geoffrey Chaucer's *Canterbury Tales*, for example – as well as non-medieval romances and literature that make use of Arthurian motifs, such as Ariosto's *Orlando Furioso*, Edmund Spenser's *the Faerie Queene* and T. S. Eliot's *the Waste Land* (1922). In an interview with Raymond Thompson, Lodge explains that *the Waste Land* and Jessie Weston's study *From Ritual to Romance*, used by Eliot for his poem, were his primary sources for the Grail quest motif in *Small World*. However, he was also familiar not only with Middle English romances, but also with scholarly studies of romance, including Patricia Parker's *Inescapable Romance* and Northrop Frye's works, when writing *Small World* (Thompson, 1999: np).

Lodge uses the Grail quest as a structural motif to convey his view of the global academic community in the 1980s, which, as Lodge remarks,

represents society in microcosm: '[t]he university is a kind of microcosm of society at large, in which the principles, drives and conflicts that govern collective human life are displayed and may be studied in a clear light and on a manageable scale' (Lodge, 1986: 169). Although Lodge's novel is set in the 1980s, in many respects it anticipates the twenty-first century development in the academe and in popular culture. The novel describes a quest for meaning, which is a hot issue in the twentieth-century literature, questioning the issues of gender and identity, problematizing women's presence in the academia, or, in fictionalized terms, inquiring into whether women can be knights (a question Hilary Swallow actually asks Morris Zapp in the novel (Lodge, [1984] 1995: 63)).

The quest in *Small World* is set in the context of literary studies, where the very idea of meaning is under threat from new literary theories, post-structuralism and deconstruction. This development in literary studies is paralleled by similar tendencies in the world culture: while the world has become a 'global campus', with geographically distant areas being connected by the availability of transatlantic travel, faxing and xeroxing options in Lodge's time – and by the rise of the Internet and social media today – meaning has become increasingly elusive, relative and uncertain, just like the Holy Grail of medieval romance. Likewise, albeit women are officially admitted into the academia, and there are three women academics in *Small World* (Angelica, Fulvia Morgana and Miss Maiden), their position is still precarious. There are fewer women than men professors in Lodge's novel. Only the Italian Fulvia Morgana is a senior academic, as Angelica is a young scholar in search of permanent position, and Miss Maiden is retired. In agreement with the fundamental characteristics of romance as a genre that fosters uncertainty, *Small World* does not resolve the contradictions between different critical theories current in literary studies or the tensions within the academic world. Indeed, Parker describes romance as 'characterized primarily as a form which simultaneously quests for and postpones a particular end, objective, or object' (Parker, 1979: 4).

Lodge's novel presents a variety of quests, many of which remain unfinished or are not achieved in a satisfactory way, but in all of which women are present, if not as questers, then as agents that help or hinder the questing 'knights'. Some quests have global significance, such as the quest for meaning in the post-modern society and the quest for a perfectly applicable theory in literary studies. There are also quests that can be described as 'career' or 'professional' quests, most notably the quest for the UNESCO chair of literary studies. This chair, or 'perilous siege', as Miss Maiden terms it, is similar to the throne of Arthur or the Grail king in Arthurian romance. In Lodge's *Small World*, this chair is eventually taken by a character who is simultaneously King Arthur and the maimed Fisher King, an elderly and distinguished scholar Arthur Kingfisher.

The novel also presents some erotic quests, most notably Persse's quest, briefly outlined above. While his quest for Angelica fails, the novel ends with Persse embarking on a new quest for another girl, Cheryl Summerbee, with whom he

realizes having been in love all the time. But Persse is not the only romantically motivated 'knight' in Lodge's romance. An unlikely knight whose life is changed through a momentous encounter with a 'fair damsel' is Prof Philip Swallow, a middle-aged academic who has grown dissatisfied with family life. Talking to his colleague Prof Morris Zapp, Swallow remembers an episode of nearly escaping an airplane crash while returning from Italy on a trip as a British Council lecturer and being lodged with a beautiful hostess, Joy, to whom he makes love, never to see her again. Swallow thinks Joy to be dead in a later plane crash, and he remembers her nostalgically, saying to Morris Zapp: 'I shall always keep a little shrine to Joy in my heart' (Lodge, 1995: 76). The reference to a 'shrine' takes the reader to the world of medieval romance, where knights would worship their beloved ladies with almost religious fervour. The chivalrously-minded Swallow, however, is about to learn Joy is not dead and, in a typically romantic turn of expectation, is about to appear in his life once again. Swallow's encounter with Joy, a young woman to whom he had once made love, gives him back a taste for life and, for a while, she becomes his muse. Swallow's personal quest, which he terms 'a quest for the intensity of experience' (Lodge, 1995: 212) is intimately associated with women, his lover Joy on the one hand and his wife Hilary on the other hand. Joy seems to be a means to an end in this quest, rather than the aim of his quest, which is in line with the representation of women in medieval romances, because certain scholars consider women to be objects of social exchange in chivalric literature rather than subjects in their own right (Kaufman, 2019).

The two women crucial in Swallow's life, Joy and Hilary, illustrate the polarities of gender relations in the Grail quest literature. In medieval romances, women have a special role in relation to the questers, acting as guides to them. In the *Queste* and the 'Sankgreal', a hermit announces at the beginning of the quest that no woman can enter it, but this prohibition is broken when Perceval's sister, who, like the elect knights, is a pure virgin in body and thought, joins the elect knights. Otherwise, the questing knights rarely encounter women during their adventures, except for devils disguised as attractive damsels. The only two women with whom knights have prolonged conversations are female recluses, who teach Perceval and Lancelot through their 'sermon-commentaries' and personal example. Indeed, the term 'sermon-commentaries' is used by Field to describe the exegesis of knights' adventures delivered by hermits, monks and recluses in the *Queste* and the 'Sankgreal' (Field, 2006: 149). In Lodge's novel, women also guide the questers in their search, teaching them the nature of unselfish love, though naturally their 'lessons' take a very different form from the guidance provided by medieval recluses. Both Hilary and Joy, who, in different ways, are used – and abused – by the pleasure-seeking Swallow, love him unselfishly, and his attachment to these women is manifest. It takes different forms: his attraction to Joy is akin to the medieval concept of *eros* or passion, whereas his relations with Hilary are characterized by caring affection, similar to the medieval *caritas*.

TYOLOGY OF WOMEN IN *SMALL WORLD*: INITIATORS, TEMPTRESSES AND ADVISORS

Lodge's portrayal of women characters in *Small World* has parallels with works of medieval and early modern Arthurian literature as well as with modern works of Arthuriana, most notably Eliot's *the Waste Land*. In *the Waste Land*, women often appear as victims, which to a certain extent is also the case in *Small World*: there is Bernadette, a pretty Irish prostitute who has been seduced and abandoned with a child, but who refuses Persse's help. Likewise, Miss Maiden has been seduced in her youth and gave birth to identical twin girls, whom she abandoned in the airplane toilet. The abandoned twins were adapted, though, and grew up into girls with polar personalities, Angelica and Lily. These early adventures are typical of medieval romance, but it may also be suggested that the eccentricities of the three heroines – Miss Maiden, Angelica and Lily – could be at least partially explained by the traumatic events they have experienced in the past. Indeed, Lodge's characterization of women in *Small World* can be best understood in the context of post-modern writing, which, as Fokkema stresses, is remarkable by its variety in the representation of character: according to Fokkema, in the post-modern novel, 'some characters are explicitly just a voice, others are emphatically body. Some characters are caught up in a game of intertextual reference, others refer to real-world experiences outside the text – and many do a bit of both' (Fokkema, 1991: 181).

Apart from the fanciful romance-like developments in the plot, the names and descriptions of several women characters in *Small World*, notably Miss Maiden, Lily, Angelica and Fulvia Morgana, are symbolic, referring the reader to medieval and early modern romances, such as Spenser's *the Faerie Queene* and *Orlando Furioso* (1516) as well as the modern poem of T. S. Eliot, *the Waste Land*. According to Lodge, the character of Fulvia Morgana was influenced by the demand to create a representative of a national school of literary criticism, so only her name is Arthurian: '[s]he corresponds to Morgan le Fay only in being a seductive witch, I suppose. The analogy there is not very elaborate' (Thompson, 1999: np). On the other hand, Bergonzi identifies Fulvia as 'a latter-day version of Morgan le Fay of the Arthurian cycles, mentioned in Ariosto as Morgana' (Bergonzi, 1995: 21). In fact, Lodge's Morgana may constitute an amalgamation of several Renaissance characters, including the Morgana, who appears as the allegory of wealth in Boiardo's *Orlando Innamorato* (1483–1495), Alcina of Ariosto's *Orlando Furioso* and Acrasia of Spenser's *Faerie Queene*.

All of these early modern characters fuse the features of a romance enchantress and a witch, who 'drains the vital juices from men, damaging their masculinity by making them too enervated to fight or to resist temptation' (Larrington, 2006: 146). The similarity to these Renaissance seductresses is highlighted by her physical appearance, which is nothing short of queenly, especially after she changes 'into a long, loose flowing robe of fine white wool, which made her look more than ever like a Roman empress' (Lodge, [1984]

1995: 128). In the fashion of Arthurian Morgan le Fay, who makes prisoners of Arthurian knights she wants to become her lover, Fulvia, who turns out to enjoy 'adult' games, takes Zapp prisoner, handcuffing him with the triumphant cry 'Ha, ha! Now you are my prisoner!' (ibid.: 137). After the fateful encounter with Fulvia Morgana, Morris Zapp is kidnapped and, as a result, largely loses all will to fight for the object of his quest, the UNESCO chair of literature studies, or to develop his academic career.

Many of the women, especially the ones associated with Persse, present features of one or several types found in medieval romance: they are virginal saints (Angelica), demonic seductresses (Fulvia Morgana and, at least apparently, Lily), guides (Miss Maiden), fairies or ladies in distress. Persse's cousin Bernadette, Angelica, as well as Lily, might be classified at times as ladies in distress, though they are largely self-sufficient, as Angelica emphatically states to Persse early on that '[she] can look after [herself]' (ibid.: 38). This way, Lodge follows the pattern of medieval and early modern romance in *Small World*, a fact he acknowledges in respect of Angelica, explaining that her 'tendency to disappear at crucial moments derives from the figure of Angelica in *Orlando Furioso*' (Thompson, 1999: np).

While Lodge's men are presented as questers, each of his women characters can perform several of the roles referred to above. Although Zapp argues that women are as numerous as men in academe and, as a consequence, can be viewed as female 'knights' (Lodge, [1984] 1995: 63), it is hardly the case in *Small World*. The only women academics are Angelica, Miss Maiden and Fulvia. Moreover, Fulvia, portrayed from the very beginning as a temptress, is actually the only female competitor for the Chapel Perilous of the UNESCO literary chair. Angelica is a 'young knight' in search of fame and patronage or, in other words, in search of a permanent academic post, but in *Small World* she is seen primarily through Persse's eyes as an object of his love and of other men's desire. Miss Maiden, in turn, is retired, so, strictly speaking, she is not 'in' the academic game: she does not present papers at conferences, and her function in the narrative is mainly that of guiding Persse in his quest. On the other hand, according to Lodge, Miss Maiden and Angelica Pabst are 'the only two characters in the novel who [seem] to know what [is] really happening' (Mullan, 2012b: np). They are not surprised by any of the coincidences occurring in the romance, until Persse reveals their family secret, the fact that Angelica and Lily are the children of Miss Maiden and Arthur Kingfisher. Thus, the women characters in *Small World* are better understood within the framework of female types encountered in medieval Arthurian romances (virgins, sexually promiscuous 'whores', and wise guides) rather than as contemporary 'knights'.

In the novel, the discrepancy between what Zapp says of the academe being full of women and the underrepresentation of women in senior academic positions is telling. For Zapp, women academics appear as dangerous competitors, and, in the case of Fulvia Morgana, they have a somewhat menacing aspect

but Fulvia Morgana is in fact the only tenured academic in *Small World*. Miss Maiden is so eccentric as to be disregarded by Zapp entirely, whereas Angelica's potential as a scholar, is, again, somewhat underrated by Zapp, who, on first seeing Angelica, pays more attention to her prominent breast than to her brains (this, however, is not entirely Zapp's fault – one cannot judge brains by looking at a person, but one can judge a person's physique). It would be dangerous to extend the parallel between Zapp's underestimation of women academics and Lodge's exclusion of female academics from the novel to generalize about Lodge's own views on women in the academe. In other novels by Lodge, such as *Thinks...* (2001), a female writer also appears as a university teacher of creative writing. In *Nice Work*, another female scholar, Robin, is, again, beyond any criticism from the professional standpoint. In this light, it seems that Zapp's underestimation of women can be ascribed, within the world of the novel, to Zapp's own unfortunate experience with his feminist wife Desirée.

To some extent, the women characters in *Small World* and their relations with male characters have continuities with Lodge's other novels; although Lodge's novels abound with sexual adventures, adultery included, the orientation is ultimately towards conventional, Christian morality rather than complete sexual freedom. Peter Widdowson argues that '[i]n Lodge's novels, there is always a crucial return (or *nostos*) for the main characters from the wide-open spaces, the fleshpots, the global campus, to a marriage which has to be remade' (Widdowson, 1984: 22). In fact, Lodge's novels are less morally challenging than they may appear at first sight, because many of them end with the lovers married or planning to marry or with the restitution of a marriage previously threatened by adultery. Restitution of marriage also occurs in one of Lodge's latest novels *Thinks...* Lodge's earlier novel *Therapy* (1985) ends with a puzzling *menage-à-trois*, which brings the protagonist, Tubby, to his first love, a woman he initially planned to marry and, it appears, should have married. In *Ginger*, the protagonist marries the girl he had 'stolen' from his friend and seduced, though he seems to regret his actions at the end.

In another novel from his 'campus trilogy', *Changing Places*, Morris Zapp and Philip Swallow exchange not only universities, but also wives, so that, symbolically, their wives become objects of exchange, like women are in medieval romance, particularly the French *Queste* (Burns, 1998), but also, to an extent, in Malory's *Morte* (Kaufman, 2019). The ending of *Changing Places* is open, though the academics' decision to return home may suggest a return to their traditional households. The expectation is partially confirmed in *Small World*: although Morris and Desirée have divorced, Hilary and Philip continue with what appears to be an unsatisfactory marriage. In the course of *Small World*, Swallow plans to divorce Hilary and marry Joy, but panics and decides to stay with Hilary. Hilary, in turn, seems to become content with her marriage once she finds, somewhat ironically, the job of a marriage counsellor. Moreover, just prior to his meeting Joy again in Turkey, there is a hint that Swallow may be able to rediscover passion with Hilary: the problem in the Swallow marriage may be habit rather than incompatibility.

What the characters of *Small World* say about sexuality is very bold, with Persse, who intends to stay virgin until he marries, making a comical exception. His attitude to sexuality may be described as 'medieval', though it can be equally well described as Victorian. Angelica's insistence on avoiding sexual relations may liken her to the virgin sister of Sir Perceval in the French *Queste* and Malory's *Morte*, yet she is very outspoken in discussing sexuality, which is something female – and male – characters rarely do in medieval romance. The characters of *Small World*, both women and men, are on the whole bolder when speaking about sex than about performing it, with the exception of the comically immoral couple of Fulvia Morgana and her Italian husband Ernesto. Zapp's encounter with the couple employs a common motif of romance, that of a knight's encounter with a seductive lady, to a comic effect. In discussing this episode in a work of literary criticism, *the Practice of Writing*, Lodge explains that, in the passage, 'Morris Zapp is re-enacting the situation of the errant knight lured into an enchanted castle and trapped in the toils of a seductive sorceress' (Lodge, 1996: 24). Zapp, despite his bold lecture on 'Textuality as Striptease' (Lodge, [1984] 1995: 20), leads a life of self-imposed chastity and is scared by Fulvia's bold advances. His theory of sexuality is the reversal of Freud's assumption about the primacy of sex: 'I came to the conclusion that sex is a sublimation of the work instinct. [...] What we really lust for is power, which we achieve by work' (ibid.: 59). Zapp's statement is similar to the position taken by another of *Small World* academics, the chaste Rudyard Parkinson, whose writings reveal close familiarity with the sexual metaphor. However, his knowledge is hardly first-hand, because he is

a bachelor, a celibate, a virgin. Not that you would guess that from the evidence of his innumerable books, articles and reviews, which are full of knowing and sometimes risqué references to the variations and vagaries of human sexual behaviour. But it is all sex in the head – or on the page. Rudyard Parkinson was never in love, nor wished to be, observing with amused disdain the disastrous effects of that condition on the work-rate of his peers and rivals. (Lodge, [1984] 1995: 98)

Persse's belief in 'premarital chastity' is startling in this context, a mark of his being an inexperienced Irish Catholic youth. Such avowals are unfashionable in the general atmosphere of the sexually-liberated academic community, where embracing sexual experimentation and deviance is a sign of supposed maturity.

As has been explained above, the representation of women in *Small World* is influenced not only by the works of medieval Arthuriana, but also by the modern ones, in particular by Eliot's *the Waste Land* and its source of inspiration, Weston's *From Ritual to Romance*. Accordingly, Swallow feels 'reconnected to the earth and the life force' when he makes love to Joy for the first time (ibid.: 73). As Joy herself tells him on the Turkish train, she, too, was awakened by the experience. In this way, Joy is similar at once to an Arthurian damsel in distress, because Swallow 'saves' her from the humdrum of everyday life and a fairy, who brings her lover

new life. The description of Joy also makes her akin to the female character of another work of Arthurian literature from which Lodge drew inspiration, Eliot's *Waste Land*. Joy is described by Swallow in terms that liken her to the earth principle, so that she becomes the equivalent of Eliot's 'hyacinth girl' (Eliot, 1971: l. 36, ll. 39-40). Moorman comments that Eliot's 'hyacinth girl, "arms full and hair wet," obviously a symbol of sexual fertility, is greeted by her lover [...], who, neither "living nor dead," cannot in any way partake of her sexuality and is stunned by her vibrant life' (Moorman, 2000: 513). The parallel between Joy and the hyacinth girl is never stated explicitly, and it is Angelica who plays the hyacinth girl in the street-theatre performance.

Although Lodge's novel – like many medieval Arthurian romances – does not have a single hero, focusing instead on the adventures of several knights and their ladies, one character who is most similar to an Arthurian questing knight is Persse. Not only his name reminds the reader of Perceval, who sought the Holy Grail, but he is also similar to his namesake in being young, inexperienced and a virgin. His sexual and worldly initiation is closely related to a trio of women, who embody different aspects of the 'Triple Goddess' – the maiden, the mother and the crone (Weston, 1920) – or, to use the terminology of medieval romance, the virgin, the seductress and the female guide. The Pabst sisters, Angelica and Lily, and their mother, Miss Maiden, assist in Persse's initiation to sexual, moral and social maturity. The culmination takes place at the MLA conference, where Persse gains sexual experience with Lily and understands that his love for Angelica was imagined rather than real.

On the other hand, and in difference from medieval romance, Lodge's women characters can perform multiple roles and can even appear as both 'virgins' and 'whores' at different points in the narrative, as well as performing the narrative function of a 'damsel in distress', which is common in Arthurian romance. For instance, at one point, Persse believes his beloved Angelica to be a prostitute and wants to rescue her from this shameful life, but it turns out that the real prostitute is Angelica's twin sister Lily, who does not want to abandon her lifestyles and thus needs no rescuing. Another 'damsel in distress' is Persse's cousin Bernadette, who becomes a prostitute after giving birth to an illegitimate son. Unlike damsels in medieval romance, Lodge's 'damsels in distress' do not appeal to Persse for help. On the contrary, Bernadette firmly rejects Persse's advice, and Persse eventually discovers that Angelica is not a prostitute. Moreover, Angelica combines saintly and demonic features, as well as retaining likeness to a fairy and a guide. Her success at evading men, a trait for which Lily calls her 'the archetypal pricktease' (Lodge, [1984] 1995: 326), contrasts with the bold sexual metaphor she uses in her speech on romance. Angelica also acts as a guide to Persse: she explains what structuralism is at the beginning of *Small World*. Towards the end of the novel, she instructs Cheryl in the theory of romance, both medieval and contemporary, so that Cheryl surprises Persse with a speech on the history of romance one would hardly expect to hear from a British Airways official:

Real romance is a pre-novelistic kind of narrative. It's full of adventure and coincidence and surprises and marvels, and has lots of characters who are lost or enchanted or wandering about looking for each other, or for the Grail, or something like that. Of course, they're often in love, too. (Lodge, [1984] 1995: 258)

This description of romance is applicable not only to medieval romances, but also to *Small World*, and, more particularly, to Persse's continuous quest for Angelica. Persse, preoccupied as he is with his attempts to catch up with Angelica, who travels from one conference to another, fails to see the similarities between his quest and that of romance heroes and heroines. When Cheryl continues her description of romance using erotic analogies, Persse is shocked, but he recognizes Angelica's influence in Cheryl's monologue: '...in psychoanalytical terms, romance is the quest of a libido or desiring self for a fulfilment that will deliver it from the anxieties of reality but will still contain that reality' (Lodge, [1984] 1995: 259). Interestingly, Angelica leaves Cheryl a 'reading list' of source texts, which include *Orlando Furioso* and *the Faerie Queene*. As a result, at the end of the novel, Cheryl becomes Angelica's successor in Persse's affection: having realised he did not love Angelica after all, Persse remembers the girl from the London airport whom he had found, unexpectedly, reading medieval and early modern romances, and understands that he had loved her all the time.

Lily, in turn, appears to Persse as an archetypal whore, and she admits to being 'a slut at heart' (Lodge, [1984] 1995: 326). In medieval Grail quest romances, such as the *Queste* and the 'Sankgreal', this type of woman would have been a demon sent to tempt the hero rather than a real woman. She manages to seduce Persse, but, in effecting his sexual initiation and making him realize he does not love Angelica, Lily plays the beneficial function of a guide. Angelica and Lily echo the twin maidens of *the Faerie Queene*, and they represent two opposites of femininity – absolute chastity and absolute licentiousness. Moreover, given the present discussion, they resemble the contrasting women characters in the *Queste*: Angelica is not unlike Percival's virginal sister, while Lily resembles a demonic temptress, such as the one who nearly seduces Percival in the romance, similar to the other archetypal temptress of *Small World*, Fulvia Morgana. The somewhat unreal, allegoric qualities of Angelica and Lily are emphasised through their physical description, with the birthmarks shaped as quotation marks on their thighs: as Lily put it, '[w]hen we stand together hip to hip in our bikinis, it looks like we're inside quotation marks' (Lodge, [1984] 1995: 325).

Interestingly, Lodge's Persse McGarrigle experiences different kinds of amorous engagement with Angelica, Lily and Cheryl Summerbee, all of whom contribute to the process of his progressive maturity. Persse's attachment to Angelica is still immature and romantic, whereas Persse's seduction by Lily represents a sexual period in his personal history. *Small World* ends with the promise of a new quest, at the end of which the protagonist seems likely to enter a more mature relationship, as Persse realises that he is in love with Cheryl,

who combines the features of Angelica (innocence) and Lily (passion). Moreover, it is possible to view Cheryl as a benevolent fairy, who falls in love with a knight, a figure such as Nimue, who frees Sir Pelleas from his attachment to Etard in Malory's *Morte d'Arthur*.

Cheryl's resemblance to a fairy is sustained by her power over the destinies of the British Airways passengers. Her allocation of seats plays an important role in the destinies of the *Small World* characters, though the outcome is not always the one that Cheryl intends. Accordingly, as a result of being seated next to Fulvia Morgana, Morris Zapp not only has a very demanding sexual affair with the Italian professor, but is kidnapped. Likewise, by detaining Rudyard Parkinson, an influential academic and contender for the UNESCO chair of literary criticism, Cheryl changes the course of the MLA conference debates, where Philip Swallow becomes the spokesman of the English school of criticism instead of Parkinson. In playing the trick on Parkinson, however, Cheryl exceeds her powers and is dismissed from her post. Furthermore, despite her quasi-supernatural powers over the passengers' destinies, she is unable to secure for herself the man with whom she falls in love, Persse. In contrast to Angelica, Cheryl appears at first as an unsophisticated reader of popular romances, but, on their second meeting, she surprises Persse by producing from under the counter a copy of *the Faerie Queene*. She impresses Persse not only with her choice of literature, but also with her knowledge of romance theory, stating, for instance, that 'in psychoanalytic terms, romance is the quest of a libido or desiring self for a fulfilment that will deliver it from the anxieties of reality but will still contain that reality' (Lodge, [1984] 1995: 259). In elaborating the theory of romance, Cheryl must be repeating Angelica's words, so that she becomes, in a sense, Angelica's pupil. Furthermore, by the end of *Small World*, Cheryl seems to have acquired another fairy-like trait which distinguishes Angelica, the power of disappearance.

Another female character who plays a significant role in Persse's initiation is Miss Maiden, an elegant elderly lady who acts as a guide for Persse. However, unlike a female guide of medieval romance, whose advice would help the hero in finding the way to the Holy Grail, Miss Maiden's advice is more misleading than helpful, because she tells the hero what he wants to hear: in the case of *Small World*, that Persse should continue to woo Angelica and that Angelica wants to marry him. In suggesting that Angelica wants to marry Persse, Miss Maiden is mistaken, because Angelica wants to marry a different young man with the surname McGarrigle. Thus, Lodge presents Miss Sybil Maiden as a guide endowed with visionary powers, making sure to indicate that these powers are limited. Her portrayal is influenced by the Sybil in Eliot's *the Waste Land* and Eliot's source for the Grail motif, Weston's *From Ritual to Romance*. In her fallibility, Miss Maiden echoes Eliot's Mme Sosostriis, the 'famous clairvoyante', who gives erroneous advice 'Fear death by water' (Eliot, 1971: ll. 43 and 55). Indeed, Miss Maiden is an academic disciple of Weston's, and her treatment of art invariably includes references to male and female symbolism, which she sees everywhere, from the Christmas pantomime *Puss in Boots*, which she praises

because 'Boots are phallic' (Lodge, [1984] 1995: 36) to Van Gogh's paintings, where 'The cypresses are so wonderfully phallic, the cornfields positively brimming with fertility' (ibid.: 197).

Miss Maiden's obsession with sexual symbolism makes her the opposite of wise advisors in medieval romance, who are religious women and who, in the *Queste* and Malory's 'Sankgreal' insist that the questers should cherish their sexual purity above all things (Field, 2006; Ropa, 2016). The common point between the women recluses of medieval romance and Miss Maiden is the authoritative manner in which they instruct the questors. Persse is incredulous at first, asking jokingly 'So Puss in Boots is equivalent to the Grail?' (Lodge, [1984] 1995: 36). However, he retains much of what Miss Maiden says, and he comments on Jessie Weston's *From Ritual to Romance* matter-of-factly, when Morris Zapp introduces 'Freud's idea of primitive society as a tribe in which the sons kill the father when he gets old and impotent and take away his women' (Lodge, [1984] 1995: 42). Judging by Zapp's words, women are simply indicators of one's social role and success, objects of exchange or quest, rather like the Grail. Zapp talks about women collectively, but the idea of women in medieval romance being secondary to knights has been popular in scholarship until recently (Kaufman, 2019). This adds to the overall intertextuality of *Small World* as romance, because as Ammann notes, in this novel, 'Story line, plot construction and characterization belong to the traditional quest-romance with stylized figures in an idealized world, a series of strange adventures and the outward as opposed to the psychological journey' (Ammann, 1991: 107).

Angelica, Lily, Cheryl and Miss Maiden, who all represent different types of Arthurian women, guide Persse in his Grail quest by teaching him in their different ways about sexuality and gender roles. Angelica's elaborate theory of romance, partly voiced by her and partly reported by Cheryl, Lily's casual adaptation of the Andromeda myth into striptease performance and Miss Maiden's explanation of art through sex contribute to Persse's education about gender roles, a development which appears timely, because Persse's Irish Catholic views are not only naïve, but also immature. Very congested here ... His sexual attraction to Angelica approaches religious worship, even fetishism. In Lausanne, he takes the hotel room Angelica has just vacated and adores the traces of her presence, including a bunch of crushed hyacinths (Angelica actually performs the part of Eliot's 'hyacinth girl' in the street theatre), a damp towel and laddered tights: '[h]e swallowed the dregs of water at the bottom of a glass tumbler as reverently as if it were communion wine' (Lodge, [1984] (1995): 268). The initiation Persse receives from Angelica's sister Lily leads to maturity rather than corruption (unlike the intervention of a demonic seductress does in the case of medieval questing knights), because Lily frees the young man from unnatural inhibitions associated with his Irish Catholic upbringing. Whereas in medieval romance Perceval emerges as a more mature man after overcoming his longing for the woman who is actually the devil in disguise, Lodge's Persse, paradoxically, needs to succumb to temptation in order to emerge as a winner in the battle with his flesh.

On the surface, it may appear that the message of sexual liberation communicated to Lodge's Persse is at odds with what the *Queste Perceval* hears from a female guide in this medieval romance, a female recluse (religious woman following an extreme form of enclosed life), who insists that the young knight should preserve his virginity at all costs. Miss Maiden's standpoint seems to be exactly the opposite, when she teaches Persse to see sexual symbolism in literature, art and popular culture. However, she never pushes the young Irishman to promiscuity. Not, we discover, a maiden herself, she apparently had only one affair in her life, like the mother of another medieval questing knight, Galahad's the fair Elaine, and only in order to ensure the continuity of line for a great academic, Arthur Kingfisher. The episode of abandoned children and their restoration years later to a maidenly mother is a direct allusion to Oscar Wilde's *the Importance of Being Ernest* (1895), another work of literature that explores the conventions of romance to a comic effect. As a result, there are similarities between what Perceval's aunt teaches the young knight and what Miss Maiden teaches Persse, because both women speak about divine love: Perceval's aunt teaches her nephew about the transcendent love of God, who can be approached through impeccable performance of chivalric tasks, from which casual love affairs can only detract. Miss Maiden teaches Persse to discern and admire the presence of male and female principles in the world around him, a myth which, in post-Christian society, is the equivalent of the medieval doctrine of divine love.

All these women, Angelica, Lily, Miss Maiden and Cheryl, wield some power over the inexperienced and naïve Persse, so to an extent they all can be viewed as female guides to the quester, a character type frequent in chivalric romance. Their power over Persse seems to derive from their femininity rather than from superior intellectual or spiritual knowledge. The virgin protagonist of *Ginger* emphasizes the influence of this elusive quality, 'femininity', on his life (Lodge, [1962] 1982: 134). In contrast to the saintly or supernatural guides of medieval romances, in a post-religious world, Lodge's female characters are neither omniscient nor omnipotent. By the end of *Small World*, Persse learns the secret of Angelica's and Lily's parentage, which makes him triumph momentarily over the two girls and their mother, Miss Maiden. Persse employs his knowledge to introduce Angelica and Lily to their distinguished father, Arthur Kingfisher.

As Persse's Grail is a wordplay on 'girl', it is unsurprising that women play a paramount role in his quest. These women assume, for Persse, some mythical, fairy-like qualities, retaining, as characters, enough of human limitations on their knowledge and power to appear real. Moreover, Persse's quest seems to be, initially, not for a real girl, Angelica, about whom he knows very little, as her sister Lily aptly proves. He seeks the essential quality of all women, their 'femininity', so that his quest resembles the quests of inexperienced young men in other Lodge's novels, such as *Ginger, You're Barmy* (1962), *the Picturegoers* (1960), *Out of the Shelter* (1970) and *How Far Can You Go?* (1980). It may be a result of his spiritual immaturity and his lack of experience in communicating with women as beings of the opposite gender which initially draws Persse to the beautiful and

enigmatic Angelica and makes him believe he wants to marry her when in fact he merely wants to make love to her.

CONCLUSION

The theme of women characters in the quest for the 'Holy Grail' in Lodge's *Small World* is a problematic one: the first impression is that, to become questers in their own right or at least to be respected by men, women have to act like the male questers. However, because the novel uses the motif of quest that originates in medieval chivalric literature, where women are objects of the quest more often than questers themselves, this involves a change in gender roles. At the beginning of *Small World*, Morris Zapp tells Hilary Swallow that many of the modern 'knights of the Round Table', in other words, academics, are women and that in fact there are more women than men in the academic world (Lodge, [1984] 1995: 63). His words must be vexing for Hilary, who has abandoned her own postgraduate research in order to raise children. However, in *Small World*, male academics are actually more numerous and more prominent than female ones. Moreover, the women academics, with the possible exception of the seductress Fulvia Morgana, are not questers: they are guides, like Miss Maiden, or objects of quest, like Angelica Pabst.

On the other hand, women characters in *Small World* play a number of roles that they share with the maidens, damsels and ladies of medieval Arthurian romances. In both *Small World* and medieval romances about the Grail quest, women appear as angelic virgins, demonic seductresses, wise guides, fairy mistresses or helpers and damsels in distress, as well as any combination of the above. Albeit Lodge's women characters are not explicitly Arthurian – that is, none of them, with the possible exception of Fulvia Morgana, is based on a single, identifiable Arthurian woman character – they are Arthurian in the sense of functions they perform in the novel. Lodge's characterization of women in *Small World* is thus best understood through his use of intertextuality, as his women characters are inspired by various women of medieval (Thomas Malory's *Le Morte d'Arthur*), early modern (*Orlando Furioso*, *the Faerie Queene*) and modern Arthurian fiction (Eliot's poem *the Waste Land*, Boorman's film *Excalibur*).

However, Lodge's intertextuality on characterizing his women as Arthurian characters goes beyond allusions to a single literary source or even a set of sources. His women are characterized in ways that remind the audience of the Grail quest narratives, where women appear as virtuous, angelic maidens, who are often, though not always, virgins (Angelica's name is a cue to her identity, but, to an extent, Philip Swallow's beloved Joy also fits into this category), sexually promiscuous 'whores' or dangerous witches (Lily, Fulvia Morgana) and wise, matronly guides (Miss Maiden). However, it would be a gross oversimplification to assign all women characters in *Small World* to specific types or even a combination of types. As Fokkema argues, 'Most postmodern

characters are both intensely tied up in language, intertext, or discourse *and* reveal simultaneously a mimetic potential which carries them beyond the simple conclusion that representation is neither achieved nor intended' (Fokkema, 1991: 189). According to Fokkema, in most cases, a postmodern character is a 'borderline' entity, 'which is both signified according to some established literary conventions and tied up in intertextual references, linguistic structures, and discourses' and which is 'representational in that it represents a concept about the world of human culture' (ibid.). Lodge's women characters in *Small World* correspond to that definition in that they both refer to a certain cultural concept, that of Arthurian women characters and to certain types of women from the real world. A young woman academic, Angelica, is sexually attractive and aware of the powers she exercises on senior male academics. Like many postmodern characters, she is caught in power relations, in this case, the power relations within the academe. She is wary of being seduced by one of the senior academics, the men in power, realizing that this will not further her career prospects. Thus, she is a virgin both for psychological reasons, as her sister Lily suggests, but also by calculation, which constitutes the mimetic side of her character as Arthurian virgin. By contrast, Lily is sexually available, and she is a typical temptress of romance: her sexuality is likewise routed in power relations, as she is conscious of the power she exercises over men, who are sexually attracted to her. In psychological terms, she is presented as a foil to her sister, who rebels against Angelica's scholarly sophistication and chastity by becoming a prostitute. Miss Maiden, a grotesque figure who sees the world through the prism of phallic and vaginal symbolism, is likewise a character who represents a certain concept:

she is a wise, yet somewhat odd adviser, a grandmotherly type of figure who is well-intentioned but somewhat out of touch with events. To sum up, Lodge's characterization of women is based on intertextuality, alluding to the characters or character types of Arthurian narratives, yet it adapts this intertextuality to the world of the 1980s academe, creating women characters that are recognizable on two levels at once: as Arthurian women and women who live in or near the academic world.

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FROM DEFOE TO COETZEE'S FOE/FOE THROUGH AUTHORSHIP

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Abstract. The article investigates the concept of authorship in the works of two authors separated by three centuries, namely, Daniel Defoe and J. M. Coetzee, both concerned, in different ways, with aspects regarding the origin and originators of literary works or with the act of artistic creation in general. After a brief literature review, the article focuses on Coetzee's contemporary revisitation of the question of authorship and leaps back and forth in time from Defoe's *Robinson Crusoe* (1719) to Coetzee's *Foe* (1986). The purpose is that of highlighting the multiple perspectives (and differences) regarding the subject of authorship, including such notions and aspects as: canonicity related to the act of writing and narrating, metafiction, self-reflexivity and intertextuality, silencing and voicing, doubling, bodily substance and the substance of a story, authenticity, (literary) representation and the truth, authoring, the author's powers, the relation between author and character or between narrator and story, authorial self-consciousness, agency, or ambiguity. The findings presented in the article show that both works are seminal in their attempts to define and redefine the notion of authorship, one (Defoe) concerned with the first literary endeavours of establishing the roles of professional authorship in England, while the other (Coetzee), intervenes in existing literary discussions of the late twentieth century concerning the postmodern author and (the questioning of or liberation of the text from) his powers.

Key words: Defoe, J. M. Coetzee, authorship, canonical/canonicity, self-reflexivity, self-consciousness, authenticity, representation

INTRODUCTION – LITERATURE REVIEW

The critical examination of Coetzee's novel *Foe* (1986) is rich and complex, being centred on thought-provoking discussions on a variety of themes and concepts that inform a multifaceted understanding of the novel. An outline of the specialized literature should take into account such issues as (listed chronologically): post-colonialism and counter-discourse (Tiffin, 1987), ideology, politics and censure (Dovey, 1988), intertextual and metafictional resonances (Splendore, 1988), interpretative authoritarianism (Marais, 1989), the notion of

history (Attwell, 1990), margin (Spivak, 1990), the ethics and politics of living in South Africa (Attwell, 1993), voice/voicing vs silence/silencing on the backdrop of apartheid (Attridge in Huggan and Watson, 1996; Head, 1997; Parry in Attridge and Jolly, 1998), the novel as 'a palimpsest Crusoe/Roxanna tale' (Chapman, 1996), textuality, alterity, deception, the mutilation of the colonial Other, the technique of reversal, allusion (Head, 1997), solitude and subtext, adaptation and hybridization, the triad power–language–identity (Caneparilabib, 2005), disruption of the post-colonial canonic discourse (Kehinde, 2006), treatment of the body (Hughes, 2008; Ingram, 2008), duality, silencing the other (Head, 2009), the power impregnated in colonialist writing, discursive worldliness, the power of discourse, similarities and differences between Defoe's and Coetzee's novels, or the notion of mutilation (Poyner, 2009), the question of authorship (Clarkson, 2009), the problem of the novel's representation of reality and truth, intertextuality (and the connection with another text, namely, Dostoevsky's *Crime and Punishment* (in Hayes, 2010), apart from the obvious connection with Defoe's *Robinson Crusoe* and *Roxanna*), the employment of the allegorical and realist modes and the re-evaluation of intertextuality (Uhlmann in Danta et al., 2011), authenticity, the question of authorship and the meanings of Friday's tonguelessness, the concept of (bodily) disability (Hall, 2012), metaphors of the body and the substantiality of the body (Kosecki, 2013), the relation between author and character, the relation between the world and storyworlds, the distinction between art and life (Effe, 2017), as well as authorship and the consciousness of the writer (Attwell, 2015), the island as a trope used to thematize South African economic and moral isolation under apartheid (Harris, 2018) or the types of women in his work (Kossew and Harvey, 2019). We consider that all of these studies outline vital aspects for the understanding of the concept of authorship in the general context of postmodern fiction and the particular case of a novel written by a South-African writer.

Existing scholarship on Defoe's novel is equally comprehensive, including numerous studies that approach the questions of authorship and literary representation, Defoe's founding role in the history of prose fiction being widely recognized. Written in a matter-of-fact way that responded to the calls for journalistic styles of writing, *Robinson Crusoe* (1719) seeks to render the impression of authenticity, verisimilitude, and real lived experience in its presentation of events and people. From Ian Watt's seminal study *The Rise of the Novel* (1957) onward, literary criticism on Defoe stressed the numerous merits of the novel. First of all, it set the founding stone of realistic fiction, which was based on the convention that 'the novel is a full and authentic report of human experience' (Watt, 1957: 32). Fiction was supposed to represent only 'the literally possible' and to faithfully render 'a very close physical and social reality' (Doody, 1997: 281-287), or one that could be recognizable to the readers as true. The secret lay in the accuracy of linguistic representation (representing reality by means of a simple, concise and accurate prose style), along with the believability/credibility of the plot (offering comprehensive descriptions based on circumstantial detail). The emphasis on the 'ordinary and

the specifically and concretely experiential (along with the everyday language specific to that realm)' (Richetti, 1998/2003: 4) marked the realistic framework on which the novel was set. The novel had a major influence on the emergence of realistic fiction, having 'perfected an impression of realism by adapting Puritan self-confession narratives to suit the mode of a fictional moral tract' (Sanders, 1994: 301). The effects of factuality and verisimilitude also result from the vividness of the adventure story and the translation of ordinary actions to an exotic place (Spacks, 2006: 47), seeking to quench the contemporary audience's thirst for 'circumstantial details of lives lived and for the remote and exotic' (Seidel in Richetti, 2008: 187). Additionally, realism was supported and complemented by other features and techniques, such as the combination of moral and fable elements, in a narrative presenting 'an adventurous, economic, political, religious, and yet ordinary character' (Bacscheider, 1986: 217). All these show Defoe's active engagement in the pervading debate of eighteenth-century British novelists 'about the nature of that evolving narrative convention we now confidently call the novel' (Richetti, 1998/2003: 8).

Many of these studies have also informed our discussion of authorship with the intention of adding to the existing scholarship on both Defoe and Coetzee. On the background of this comparison, the innovative contribution of this article is twofold. On the one hand, it aims at supplementing existing research on the two authors' involvement in the history of prose fiction in relation to questions of narrative representation and authorship. On the other hand, by means of its discussion of the concept of authorship in close connection with other central concepts specific to postmodern literary theory, it intends to make its own original contribution to the understanding of postmodern authorship.

DEFOE AND COETZEE'S LITERARY ENCOUNTER

While it is a fact that Defoe's work served as a source of inspiration for many works of art along the centuries, other literary *Robinsonades* were also written in the twentieth century. Before mentioning some of them, we will define the term Robinsonade as a story of the adventures of a person stranded on a desert island according to Cuddon (2013: 613). Postmodern Robinsonades include William Golding's *Lord of the Flies* (1954), Muriel Spark's *Robinson* (1958), Michel Tournier's *Friday and Robinson* (1977), J. G. Ballard's *Concrete Island* (1974), all published before Coetzee's. We can observe that in some of these works authors also use some other form of isolated space than the classical island (as in the case of Ballard's novel). But what the South African writer does in this novel is the fact that he goes much further than the traditional Robinsonade: D. Attwell (1992: 10) regards the reconsideration of Robinson's story as a perfect ground for creating an allegory:

In what is perhaps his most allegorical work, Coetzee replays *Robinson Crusoe* as an account of the relations between the institution

of letters (Foe), the colonial storyteller seeking authorization through the metropolis (Susan Barton), and the silenced voice of the colonized subject (Friday).

Despite the (ab)use of circumstantial detail and other components of realism, Defoe's novel also has an allegorical dimension: the author wants to teach his readers aspects of the Christian beliefs inherent in the narrative (rebellion/disobedience, fall, awareness of sin, repentance, recovery, redemption), or reveals at least in part a spiritual journey. Defoe also employs Crusoe as an allegorical representation of the colonizer, whereas Friday stands for the tamed colonial subject. However, as suggested above, Coetzee's allegory goes in different or deeper ways.

Additionally, *Foe* was also seen as Coetzee's most overtly metafictional text, a postcolonial reworking of *Robinson Crusoe* which 'unwrites' his colonial intertexts (Poyner, 2009: 92) or at least transforms them. Attwell (1992: 3) remarked in the early stages of the research on the novel that it engages into an act of reflexive self-conscious analysis in which reflexivity is directed at 'understanding the conditions – linguistic, formal, historical, and political – governing the writing of fiction in contemporary South Africa'. Coetzee himself in an interview given to Attwell admits that *Foe* is 'a tribute of sorts to eighteenth-century prose styles' (Attwell, 1992: 146) and 'an interrogation of authority' (ibid.: 247). Sheila Roberts too (in her study *Post-Colonialism, or the House of Friday – J. M. Coetzee's Foe*) remarks how the novel exploits the relationship between our experiences and our stories; any analysis of the novel looks like 'a hunt, a paper-chase, to discover referents to other texts and to a wealth of characters'. From a colonial perspective, she sees the novel as 'an imaginative rendering of the colonial personality and of colonialism' in their attempt to find 'an authentic, uncolonized mode of discourse' (in Collier, 1992: 335). Anne Haeming, in the essay titled *Authenticity: Diaries, Chronicles, Records and Index-Simulations* (in Boehmer et al., 2009: 174), speaks about 'the compulsive search for authenticity', or truthfulness in the work of fiction. This search makes Coetzee create, according to Haeming, texts which develop from the edges – thus leading to the emergence of texts that function as 'edges between fact and fiction'. Even Susan is perfectly aware of this and directly expresses her pressing desire of having her story authentically told:

How different would it not have been had he built a table and stool, and extended his ingenuity to the manufacture of ink and writing-tablets, and then sat down to keep an authentic journal of his exile day by day, which we might have brought back to England with us, and sold to a bookseller, and so saved ourselves this embroilment with Mr Foe! (Coetzee, 2010: 82)

Benita Parry in the study *Speech and Silence in the Fictions of J. M. Coetzee* (in Attridge and Jolly, 1998: 149) places *Foe* between the 'self-reflexive novels which

stage the impossibility of representation' and on the background of critical interpretations which pinpoint the novel in the network of fiction. This type of fiction, by use of parody and reflexivity, undermines the authority of colonial narratives through subversive rewritings, thus 'opening conventions to scrutiny and confronting the traditional and unquestioned notion of the canon'. Parry adheres to the opinion of most critics that Coetzee's novels are expressions of the 'critical stances on the instability of language and the unreliability of narration', a type of thinking which leads to the emergence of a highly self-conscious practice of writing 'which displays the materials and techniques of its own process of production' (ibid.: 150). All of these interpretations have as a common denominator the fact that they all regard Coetzee as a master in re-shaping and dissimulating postmodern (temporal and spatial, literary and historical) issues in an apparent overt fiction. Foe, the author in the book, reveals to Susan how he wishes to write her story, according to a conventional recipe of writing:

We therefore have five parts in all: the loss of the daughter; the quest for the daughter in Brazil; abandonment of the quest, and the adventure of the island; assumption of the quest by the daughter; and reunion of the daughter with her mother. It is thus that we make up a book: loss, then quest, then recovery; beginning, then middle, then end. As to novelty, this is lent by the island episode – which is properly the second part of the middle – and by the reversal in which the daughter takes up the quest abandoned by her mother. (Coetzee, 2010: 117)

The novel has also been extensively discussed in terms of space: P. M. Salván (2008) sees the island as a heterotopia, a space whose limits Susan urges Crusoe to go over/beyond; even London is seen as an 'arbitrary limit' that Susan pulls Friday, this time, into considering leaving in search of the author. A similar perspective is introduced by Marion Fries-Dieckmann in her study *Castaways in the Very Heart of the City. Island and Metropolis in J. M. Coetzee's Foe* (in Volkman et al., 2010: 167-178) who discusses 'the topographical setting of the plot and the "virtual" setting of narration in *Foe*' (ibid.: 168). She posits that Coetzee 'puts dichotomies such as periphery/centre and nature/culture upside down' and this is obvious and felt as such even by Susan who remarks on her return to London that the bailiffs coming to Foe's house are, according to their complaints, 'castaways in the very heart of the city' (Coetzee, 2010: 62). Additionally, as opposed to *Robinson*, the topography of *Foe* is differently proportioned as two thirds of the action take place in or around London, in the civilized world. At the same time, there is a blurring of spaces (no clear coordinates are given either about Friday's Africa or about the Americas) in an attempt, perhaps, at signalling the postmodern issue of the blurring of the borders between what distinguishes the moral from immoral, the superior from the inferior, the weak from the strong and so on.

Both colonialism and post-colonialism are central concepts when discussing the temporal context and the thematic concerns of the two novels. The novels deal,

in different ways, with the policies of control and domination and the liberation from them. The British colonial rule of other areas of the world constitutes an important theme in Defoe's novel, whereas Coetzee's novel highlights ideological as well as literary tensions related to the period after colonialism. Even after the end of colonial rule in Africa in the 1950s, policies of control, division, separation, isolation, or segregation were still present in the apartheid period in South Africa (1950–early 1990s), with institutionalized discrimination against and separation of the non-white population from the white one. Officially given no right to speak and decide for themselves, the South Africans felt alienated and very much treated in terms of negative otherness, i.e. seen as (undesirably) different. As we will show further, Coetzee himself (re)presents these issues in his novel, connecting the general literary notion of (the death of traditional) authorship with the particular case of the silenced African other.

ON AUTHORSHIP, AUTHORITY AND THE AUTHOR

The place of *Foe* in the context of postmodern writing seems to be in line with the type of writings which, despite 'the alleged intolerance for the sentimental humanism', are fascinated by and fixated on 'author-effects and author-figures' (cf. Bennett, 2005: 109). Current studies sometimes equate literary theory with author theory (ibid.: 4) and project the concept of author against the backdrop of literary evaluation and intention(ality). In his seminal study, Bennett registers how after Roland Barthes's essay *Death of the Author* (1967) and Michel Foucault's essay *What Is an Author* (1969) critics have expanded the analysis and understanding of the concept of author, have pushed upon and challenged 'the social, historical, institutional and discursive limits on, and conventions of, the author' (ibid.: 5) as the concept had been understood up to the end of the 60s. This is how the concept of author was subsequently analyzed in conjunction with terms such as: institutions, gender, ethnic, class or racial identifications and identities, intertextuality, parody, representations of the self, limits of authorial intervention, the subversion of authorial powers, etc. This is the perspective from which we intend to develop the analysis of the concept of author and authority further in this paper.

Before this, we need, however, to underline the importance of understanding one other term, i.e. intertextuality. In his study of the term, Graham Allen presents the term in its initial understanding introduced by Saussure and then moves to reconsiderations of or additions to the understanding of the term made by Bakhtin, Kristeva and Barthes. Finally, Allen traces the term up to more recent interpretations which regard intertextuality as a relationship which authors create and readers decode between a text and previous texts. Thus, the act of reading becomes a plunge into a network of textual relations on more levels (linguistic, stylistic, semantic, authorial, ideological, social) and validates an interpretation based heavily on 'relationality, interconnectedness and interdependence' (Allen, 2006: 5).

The question regarding who writes, how stories are constructed and who controls them is announced from the title of the novel and dominates the text (Head, 1997: 115). Coetzee himself makes reference to the centrality of this issue in *Roads to Translation*:

My novel, *Foe*, if it is about any single subject, is about authorship: about what it means to be an author in the professional sense (the profession of author was just beginning to mean something in Daniel Defoe's day) but also in a sense that verges, if not on the divine, then at least on the demiurgic: sole author, sole creator, and the notion that one can be an author as one can be a baker is fairly fundamental to my conception of *Foe*. (Coetzee, *Roads to Translation*, cited by Clarkson, 2009, in Note 14: 199)

The strength of the novel was identified in 'the literary representations of race and personal relations, *not* intertextual relations' (Maureen Nichols, 1987, *If I Make the Air around Him Thick with Words: J. M. Coetzee's Foe* apud Prentice in Mehigan, 2013: 93). It may be that Coetzee's enmity, antagonism or opposition is related to more aspects: to the canonical norms regarding authorship, to racial representations, to traditional employments of intertextuality and metatextuality, to the imperfections in the type of novel construction that Defoe offered and, ultimately, to the whole treatment of the racial/colonial other in history.

The issue of authorship is closely related to metafiction or self-reflexivity of the text as it unfolds the strategies regarding its own writing. While looking for self-consciousness related to novel writing, Coetzee inevitably questions the canon, subverting the tradition and confronting its flaws. As suggested above, it questions the conception of author as deity, just as it denies the (post) colonial ideology and the colonial author figure. By means of various strategies, such as the silencing or voicing of characters or narrators, giving or removing the substantiality of the body of the character and of the body of the story, the doubling-cum-reversal principle, Coetzee's work subverts traditional notions of authority and distorts the original in order to showcase these intentions, confirming Michael Chapman's view (1996: 405) that the novel is 'a palimpsest Crusoe/Roxanna tale about authors and authorities'. As a self-reflexive text, the novel develops around 'discussions, meditation and debate about writing' (Prentice in Mehigan, 2013: 98), stemming from the opposing discussions between Susan and Foe about how and what of the female character's story should be put on page and from the attempts of understanding the true reasons behind Friday's silence. If Crusoe's and Friday's stories are re-written, the introduction of Susan breaks the pattern. The apparent parody extends intertextually to Defoe's *Roxana* and later on the strength of the narration derives from its metafictional outpourings either from the would-be author Susan or from the external narrator.

Coetzee's novel seeks to dismantle the colonial ideology of its source text by destabilizing the authority of the colonialist author-figure embodied by Defoe, Cruso, but also Barton and Coetzee himself (Poyner, 2009: 97). In fact, Coetzee's

concern with the troubling issue of authorship started in childhood after he read Defoe's novel, assured that it was written by the character himself, as his autobiography, because this is what was stated in the book (Attwell, 2015:124). In effect, it was the product of Defoe himself, a literary embodiment of many of his literary, social or political beliefs. In opposition, Coetzee denies the authorial authority upon a text in that he purposefully reveals the tensions, doubts and questions of a narrator in telling a story, in preserving its authenticity, the (im)possibilities or limitations of performing the act of narrating, and the very refusal to do so. All these lead to the understanding that language itself is unstable, the reality of things is equally interpretable or that the understanding and, consequently, representation of reality can be partial, biased or misleading.

In so doing, Coetzee imparts independence to the text, speaks only of what is speakable, brings forth questions about the literary act of writing or representing and leaves greater room for a special type of verisimilitude that emerges from the independence granted to many of the narrative components. Coetzee shows interest in reclaiming the authority of the story over itself and of the colonial other's own story. The issue of authorship in conjunction with authenticity is also central to Coetzee, and Haeming (in Boehmer et al., 2009: 175) observes that his

writing questions whether humans can have authority over ontic reality. He examines this through the prominent appearance of diaries, travel-writing, letters and archive material in his work. The human being is cast as *homo faber*: a producer of 'worlds' which always refer to an existing author, initiator, cause or index. This locating as such elucidates Coetzee's repeated emphasis on verifiable references, traces and inscriptions. In their analogous relation to the absent physical cause, I suggest that these traces are essentially messengers of authenticity.

The question of authorship is, for instance, put forward by Susan's meditation about the conditions of writing, which triggers the idea of the speaking subject and the written text as 'creating a place in which the writer becomes the "I" of the utterance' and the 'agent of the action' (Clarkson, 2009: 87). From the early stages of her existence on the island, Susan is aware that a would-be-author has to develop a power of recording which is bound to come from the ability of remembering details and particulars; she explains that originality and authenticity are achieved through the author's power of individualization and strong pen in rendering events:

The truth that makes your story yours alone, that sets you apart from the old mariner by the fireside spinning yarns of sea-monsters and mermaids, resides in a thousand touches which today may seem of no importance, such as: When you made your needle (the needle you store in your belt), by what means did you pierce the eye? When you sewed your hat, what did you use for thread? Touches like these will

one day persuade your countrymen that it is all true, every word, there was indeed once an island in the middle of the ocean where the wind blew and the gulls cried from the cliffs and a man named Cruso paced about in his apeskin clothes, scanning the horizon for a sail. (Coetzee, 2010: 18)

Later on in her journey of becoming an author, Susan, now self-invited in the author's (Foe's) house becomes aware of the power of representation, the importance of perspective and the ability/talent of putting everything into words: 'Does it surprise you as much as it does me, this correspondence between things as they are and the pictures we have of them in our minds?' (Coetzee, 2010: 65)

As an agency interior to the text, the writer invites the reader to get engaged in a dialogic interaction, using the Bakhtinian terms (Clarkson, 2009: 88). Muteness is thus related to both Susan and Friday: he cannot deliver his own story, and this incapacitates her to write, too (*ibid.*). Also, by using the third person, Coetzee intentionally subverts the authority of the speaker/narrator traditionally assigned to the 'I', signalling that 'the position of authority with respect to the utterance is one that has been destabilized' (*ibid.*: 37). Or, in Attwell's words (2015: 129), he was concerned with getting the author involved in his story, in what he writes about, as opposed to the eighteenth-century separation between author and character, despite the trick of verisimilitude and plausibility and the use of the first person narrative, and for this he had to find ways to introduce 'greater self-consciousness' into the novel. In so doing, what we are offered is 'a story of Coetzee's search for himself among his materials' (Attwell, 2015: 130). Coetzee's seems to be using Susan to speak on his behalf on this matter when she declares to Captain Smith of the ship that rescues her and Cruso from the island:

'I would rather be the author of my own story than have lies told about me,' I persisted – 'If I cannot come forward, as author, and swear to the truth of my tale, what will be the worth of it? I might as well have dreamed it in a snug bed in Chichester.' (Coetzee, 2010: 40)

Authorship can also be discussed in connection with doubling. For instance, the final section of the novel offers 'a new narrative' (Uhlmann in Danta et al., 2011: 93) in a new temporal frame than that of Susan's story, and with alternate/double ending. If most of the novel is delivered between quotation marks and is credited to Susan Barton, who writes in the first person, the short *fi* section removes these quotation marks and surfaces an anonymous narrative voice. This narrator resumes the story from where it had stopped and offers a narrative which 'doubles and distorts the first, just as the novel as a whole doubles and distorts Daniel Defoe's *Robinson Crusoe*, just as, perhaps, that story doubled and distorted the stories of Alexander Selkirk, whose story Defoe was accused of plagiarizing, and even that of Defoe himself' (*ibid.*).

Ambiguity is another concept that can also be related to authorship, the ambiguity of critical reception, for instance. Coetzee makes a parody of 'the tendency to read a metaphorical, personal significance into the most physical and material of situations' (Hall, 2012: 167), as it happens with Friday, whose mutilated body becomes a symbol of the muted and mutilated colonial other. Likewise, Friday's stream coming out of him at the end of the novel is equally ambiguous or engenders many interpretations. Hall argues that Coetzee's 'insistence that the bodies he depicts should be read as neither entirely literal nor in exclusively metaphorical terms creates an effect that is destabilizing yet imaginatively generative' (ibid.: 170).

Other important concepts that the author plays with on the edge between authority and freedom are silence and silencing, muteness or having a voice/voicing. Keeping silent may signify the intentional keeping of a secret, as in Susan's case, or the unintentional inability to express oneself, as in Friday's case, just as having a voice implies being able to freely express one's views, opinions, or feelings. At the opposite end of this line of interpretation of the act of silencing his characters, Uhlmann (in Danta et al., 2011: 92-93) observes Coetzee's double play of authority and suggests that Friday cannot or does not wish to tell his story, even though learning Friday's true story becomes, both for Susan Barton, and Daniel Foe, the key. It may be that it is through the kind of thinking possible in writing through, through the powers of imagination, that his story can be given a voice, while Coetzee also hints at the impossibility of an author to do so. Head (1997: 119) also considers that Friday's silence symbolizes 'the repression of South Africa's black majority' and thus, this cannot be redeemed. If the inability to describe the Other is a constant feature of the book's narrative strategy (ibid.: 121), it can equally be true to say that one's genuine or 'true' story can only be given by the one experiencing it, thus leading us to the notion of that which is unspeakable. Ultimately, it is a sample of 'genuine meta-counter-discursiveness. It is the position of Coetzee refusing to write for Friday' (ibid.: 128) or, in Effe's words (2017: xi), 'a metanarrative reflection on the relation between author and character, and on the relation between the world and storyworlds'. However, as Benita Parry highlights (in Huggan and Watson, 1996: 52), ironically, the author's textual strategies of silencing one or more voices (Friday, on a physical level; Susan, on an artistic level) demonstrate his own authorial textual power while ostensibly critiquing these strategies.

Friday and his story signify nothing until or unless 'his discursive worldliness is fashioned in discourse', Poyner (2009: 91) stresses. So, his discursive agency is also mutilated and, as a consequence, the author's ability to deliver his story is also impossible and perhaps even willingly accepted. Coetzee's novel was written in the period of the apartheid oppression, in the years of the States of Emergency, beginning with 1985, so Friday's muteness can be related to the silencing of South Africa's black peoples. Divested of their rights as free citizens, they were left without a voice in state affairs (ibid.: 93). Besides this interpretation of forced silence or silencing, it could also be that Friday deliberately chooses to remain

silent or would remain so even if he were given a choice or a chance to express himself in words or images. Susan is almost certain of such a possibility after seeing Friday's failure in learning the words she wanted to teach him (pivotal words in defining his identity and journey in life: 'house', 'ship', 'Africa' and 'mother'; see Culea and Suci, 2020, p. 67 for further discussion on this): 'Could it be that somewhere within him he was laughing at my efforts to bring him nearer to a state of speech?' (Coetzee, 2010: 146) His refusal or resistance may signify his intentional option to remain silent in a world which would not understand or accurately represent his story. Whether deliberate or not, his (everlasting) muteness is also 'a suggestion of the mutilating anti-humanist outcomes of colonialism and racism' (Poyner, 2009: 93), an effect of past practices and ideologies and an insinuation that the future will look no brighter.

It is the sense of disablement of the (white) writer that Coetzee expresses here, through the mutilated figure of Friday, Atwell (2015: 134) also pinpoints. No more interested in Crusoe's story-making, Coetzee would face his own limitations precisely in Friday's figure. This may explain why one of the titles Coetzee had in plan for the novel was *Friday* (ibid.: 130). Friday's silence and its representation does not simply frame 'Coetzee's judgement of colonialism; it is his judgement about the failure of post-colonial nationalism' (ibid.: 133). This may explain his final inability to express words, with only sounds emerging from his mouth, as a suggestion of a perpetual quest for freedom and even a quest for 'understanding that is beyond language's reach' (ibid.: 136). So, we could say that the authorial excursion takes us back and forth in time in relation to representing and understanding the colonial other, from Defoe's times, through the post-colonial ones, to glimpses anticipating the impotence of the future, be it ideological or linguistic, to offer an accurate representation and treatment of the African other.

Other related concepts also shed light on Coetzee's interest in authorship and his discursive powers: the body, bodily substantiality, substance in/of a discourse, or substance of a story, as discussed by Poyner (2009). First of all, what strikes the reader is Friday's bodily mutilation: his tongue had been removed, and he may have even been castrated. The significance of all this may be that he was dispossessed of 'both his sexual potency and the ability to author his own life and story' (ibid.: 96) and, somehow, dehumanized. Even though he is mute, 'Friday, in his pain, is a substantial body, but his story cannot be appropriated by Western discourse' (ibid.: 98). Also, Susan Barton 'insists on her bodily substantiality, which she mistakes for the substance of a story' (ibid.). At the same time, substance in/of discourse relates to the power of discourse: without the gift of language, one cannot have discursive substance. Barton and Friday lack substance in discourse because their powers of self-representation are encumbered (ibid.: 98). For Barton, her adventure on the island, along with Friday's story, would constitute the substance of the story. However, at the end of the novel, Coetzee achieves another kind of corporeality, a state in which 'bodies are their own signs' (Coetzee, 2010: 157) and which seems to be the ultimate state of finding the word and the story:

His mouth opens. From inside him comes a slow stream, without breath, without interruption. It flows up through his body and out upon me; it passes through the cabin, through the wreck; washing the cliffs and shores of the island, it runs northward and southward to the ends of the earth. Soft and cold, dark and unending, it beats against my eyelids, against the skin of my face. (ibid.)

In an episode built on the main symbol of the (artistic) stream which, in an almost epiphanic manner, 'flows', 'passes', 'runs', 'beats' with the effervescence of a creative force, author and character seem to overlap and become one entity as the character continues to exist through the author and the author gains the life of his character.

Back to Defoe, apart from his spiritual awakening, his narrator showed awareness if not direct care for his body, which he caters for with patient work. The survival theme has long been debated regarding the novel and, implicitly, it was Crusoe's body that was more important than Friday's. Friday readily accepts being dominated, his "tongue" learning the language of his master and subduing instructions. We may say that his tongue accepts the linguistic and, consequently, ideological domination coming from his master. For Crusoe, conversing with Friday and teaching him his language is an occasion to practise his mother tongue, to communicate, to verbalize his emotions and thoughts. At the same time, it allegorically serves the author's ideological purposes: Crusoe/the one who asks questions must unilaterally transmit the ideology of the colonizer to the colonized subject/the one who answers:

[...] I began now to have some use for my tongue again, which, indeed, I have very little occasion for before; that is to say, about speech.
[...] and having taught him English so well that he could answer me almost any questions [...]. (Defoe, 2000: 164)

In contrast, Coetzee has other goals. With Crusoe no longer a necessary tool, who is thus deemed irrelevant if not untruthful, Friday takes central position in the narrative, and though still a cannibal, this time he is a speechless creature. In fact, Barton and Foe are also seen as cannibals (McCorkle in Boehmer et al., 2009: 139) because they seem to consume everything around them in search of their story. Susan even seems to consume Foe in their love-making scene as a succubus that sucks vitality out of the author in the desire of becoming herself an authoress. The body (of the character, of the text, of the story) and the tongue of the character are highly symbolical of the truth: the truth that has been silenced, mutilated, removed altogether, cannot be authentically told. The truth about the colonial other has been distorted and the other now unwillingly or willingly refuses to deliver his story. This, in turn, destabilizes the authorship of the colonial other and this has an impact on the author as well. It is Coetzee's signal that he cannot and does not want to take over Friday's story as long as his power of speech, and therefore his power, his identity, have been disabled.

Both colonial and postcolonial discourses on the other are denied through Friday's mutilation, and the destabilized powers of authorship stand out. So there is silence, a silence that marks the gap that exists between colonizers and the colonized subjects, between past, present and future, between postcolonial writings and the depicted characters and their life stories, between discourses of the West about the African other and their own inability to tell their stories.

Mystery surrounds Friday's character and the notion of power itself takes on new overtones as opposed to the destabilized powers of (discursive) authorship. Friday is not directly presented as loquacious or as witty as in Defoe's work, nor is he tamable. But the mysteries he holds (the mystery of his missing tongue, the mysterious flower sprinkling on the surface of the water, his playing the flute, his mysterious lack of attraction to Susan or his ability to learn writing quickly) create such possibilities as they could be seen, in fact, as signs of power. This is a type of power which does not end with the end of the novel because, though dead, his body continues to exist as a sign, or because this power was transferred to the narrator through the symbolical inspiring 'slow stream, without breath, without interruption' (Coetzee, 2010: 157).

Furthermore, the critique of the colonial mentality is still in place. Susan has an obsessive drive of deciphering and educating Friday specific to the colonial mentality. But Coetzee makes Susan go beyond this colonial type of discourse and, by leading her into the metafictional discourse, he gives her the ability to see the act as a metaphorical one. Thus, by comparing the cutting of the tongue with castration, she steps into seeing the act as a metaphorical unmaning. The castration is later on proven as true when Susan sees Friday dancing in Foe's robe and she sees (or rather does not see) what is there (or rather what should have been there):

In the dance nothing was still and yet everything was still. The whirling robe was a scarlet bell settled upon Friday's shoulders and enclosing him; Friday was the dark pillar at its centre. What had been hidden from me was revealed. I saw; or, I should say, my eyes were open to what was present to them. (ibid.: 119)

CONCLUSIONS

Defoe's novel mirrors many of the author's own convictions and pursuits, such as his dissatisfaction with his socio-political exclusion, his social ambition as well as his social insecurity, his yearning for power and social success, his fear of his fellow men, his preference for secrecy, his imperialism, his belief in Providence, as well as his admiration for commercial and technological enterprise (Doreen Roberts in the *Introduction* to Defoe, 2000: XXVII), while trying to produce a narrative that would appeal to its readers due to its promise of authenticity and realism. With the notion of professional novelistic authorship still in the making,

Defoe's fictional exercise sets itself within the limits of formal realism, while framing a spiritual fable with a utilitarian work ethic at the background.

Coetzee shows more concern for the art of writing itself, for authorial self-consciousness, symbolically dismantling the kind of authorship and narrative construction Defoe exemplified, especially regarding the question of who writes, whether this account is truthful or not, or matters related to colonial discourses on the colonial other, the silencing or voicing of the other, the question of narrative agency, and most of all the imperial representations concerning the African other. Mark Mathuray in the essay *Sublime Abjection* (in Boehmer et al., 2009: 159) registers as a major aspect of the authorial intention in 'the figuring of alterity', but also (as a symbolical representation of Friday's dumbness) his 'reticence to speak in the name of the oppressed', while managing nevertheless to make the slave 'embody some form of anti-colonial resistance' – Friday's silence is endowed with power because of the refusal he manifests towards some of Susan's requests or through the disinterest manifested towards some of her (more or less veiled) allusions.

It thus appears that the main coordinates of the novel are the distinct, even opposite concepts of author – character, world – art (or truth – art, not to oppose the so much contested concept of reality to art), substance – spirit, writing – reading, body – text, authority – subjection, which are open to and opened by mutual encounter and transformation, as identified by Prentice (in Mehigan, 2013: 92). Coetzee himself in his acceptance speech for the Nobel Prize he won in 2003 mentions the oppositional patterns inclusion – exclusion, shaping – framing as capital to the writing and the understanding of his novel.

Ultimately, the novel, as 'a book of ficto-critical concerns' (Prentice in Mehigan, 2013: 91), is as a reworking that analyzes the concepts of character, story, author(ship), process of writing, language within the story, art's contribution to the world and viceversa (ibid.), bringing an important contribution to this type of writing. What is particularly intriguing is, as shown by Parry (in Attridge and Jolly, 1998: 150), that even if *Foe* is a re-narrativization in which only the European possesses the word and the ability to enunciate (cf. Parry in Attridge and Jolly, 1998: 151) and even if the author claims that agency is not his to give or withhold through representation, he does precisely this. The result is 'an artefact contrived by a masculine writer pursuing the possibilities of a non-phallogocentric language' (ibid.: 158).

As we have shown, the historical and literary trajectory sketched in this article from Defoe to Coetzee, on the backbone of the central notion of authorship, records in itself the transformations the term has gone through, along with other components of literary works, in a dynamic process of revisiting literary canons on literary creation. Throughout the entire novel and culminating in the final scene, Coetzee materializes Barthes's concept of the 'death of the author' by destabilizing, through *Foe*, the authority established by Defoe. The illusion of verisimilitude is replaced with a new form of authenticity which exploits the potentialities of the represented world.

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THE LATVIAN TRANSLATION SCENE AT THE BEGINNING OF THE 20th CENTURY

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Abstract. The first decade of the 20th century was a period of huge advances and expansion in the Latvian translation scene. New, contemporary authors' works became available to Latvian readers. The Latvian readership was consciously being integrated into general European literary trends. It was also a heyday of periodicals that published numerous translations, including numerous novels. There are countless parallel translations even reaching double digits. Translations included various genres and the traditional Latvian interest in plays was obvious. German was gradually losing its dominant positions as both a source and intermediate language, Russian was advancing. This period also saw a change of generations among translators, and with the new generation women became visible in translation scene. Practically all Latvian writers were also active translators. The translation method changed from localisation to a fidelity mode with a tendency towards foreignisation. Frequently translations now had prefaces and explanations by the translators. Translated literature now ranged from serious classical works to modern ones and from pulp literature to high quality creations. The quality of translations was also very varied. The expansion of translation and the cultivation of new domains went hand in hand with the development of the Latvian language itself.

Key words: translation history, Latvian, censorship, Russification, publishers, orthography

INTRODUCTION

When analysing the Latvian translation scene, we can see a number of relatively distinct periods, each with its own characteristics. In the 20th century they are delineated by sociopolitical events: revolutions, wars and occupations. The period before the First World War is in this sense very distinct with a marked increase in book and especially periodical publishing, a huge growth in translations and a burgeoning interest in world culture. In contrast to previous periods, there is a particular interest in the quality of the originals and of the translations.

This period of Latvian literary links with other cultures and languages has been studied extensively as regards specific languages, and limited to fiction: Swedish (Stepiņš, 1983), Danish (Stepiņš, 1989), Norwegian (Burima, 2007), Finnish (Jundze, 2002), German (Vāvere, 1971; Kalnačs, 2005) and Hungarian (Gudriķe, 1999). However, these studies focus on the originals, their ideas and contribution to the development of Latvian literary thought. Issues of translation quality, translation language and the general translation scene have so far not been studied.

The choice of translations shifts from the entertainment genre to information and insight into literary processes, the works translated are more and more recent, thus introducing Latvian readers (and authors) to contemporary European trends and processes. Convergence with European standards fosters variety and democratisation in literature (Klekere, 2017).

This is promoted by an extensive and broad literary criticism that offers comprehensive and occasionally highly detailed information about the literary processes abroad and their potential importance for Latvian culture. The greatest Latvian poet and translator of the period, Rainis, puts this into words in a letter to the publisher Gulbis in 1909:

Something new and great can grow only from the absorption of the cultural universe. By devoting half of my life to translating the whole library of classics, I wanted to give the Latvian nation the foundation and opportunity to create something new and great of its own. (*Literārais*, 1961: 249; translation here and further mine).

This is a clear formulation of the defective stance: the need to absorb missing elements from others (Robyns, 1994). In translation criticism the quality and language of translations (which is gradually improving) does not attract sufficient attention. The emphasis is first and foremost on the ideas of the originals and the correctness of Latvian.

Āronu Matīss's index of translated fiction works, including periodicals (*Latviešu*, 1902) provides a certain snapshot of the translation scene before 1902: 1467 foreign writers of whom 759 are Germans, 241 Russians, 97 French, 58 English, 34 Polish, 9 Estonians, 3 Lithuanians. This shows the trend of the end of the 19th century. It should be pointed that Āronu Matīss was aware that the index was incomplete and requested information on translations, localisations, authors and translators to be sent to him as the availability of information was in a very 'sorry state' (Āronu Matīss, 1900: 3).

The beginning of the 20th century saw a change in the literary polysystem: the rapid growth of Nordic and Estonian translations, more Russian translations and a lower proportion from German, which hitherto had completely dominated the translation scene, as well as interest in other literatures. German, though, remained the dominant source and intermediary language.

THE SOCIOECONOMIC SITUATION AT THE TURN OF THE CENTURY

The beginning of the 20th century saw fast economic development in the territory of Latvia as well as rapid social change. Astounding industrial growth turned Riga into the third city in the Russian Empire as regards the number of industrial workers. It was the fourth largest producer of goods and the largest export port of the Empire. Latvians, hitherto country people, poured into Riga and other towns. Thus, while in 1867 Latvians constituted 24 percent of Riga residents, by 1897 their proportion had reached 45 percent (Plakans, 1997: 71). The old system of social stratification was collapsing, the number of Latvians owning property growing fast. However, political power in the Baltic provinces remained in the hands of Russian governors, while the German barons retained their privileges and owned huge landed estates. There were no political parties and local elections were limited in scope. Latvians were still oppressed by the German (and in the east Polish) landlords, who controlled the land, as well as the Russian bureaucracy which had been implementing an active policy of Russification since the late 19th century. However, more and more Latvians managed to obtain a good education. The general educational level compared to Russia's was high: literacy was around 90 percent, similar to Estonia and Finland and the highest in the Empire. Only in eastern Latvia was it around 50 percent (Bērziņš, 2000: 287). This is important when considering reading habits. It should be also noted that many educated Latvians could read texts in German and Russian in addition to Latvian translations.

RUSSIFICATION

The last decades of the 19th century saw a severe Russification campaign in government institutions, the courts and education (Baltiņš, 2019: 97-102). There was a massive influx of Russians and an exodus of Latvians to Russia (landless peasants were offered land, and intellectuals could get good jobs in Russia). There was a gradual top-down Russification of the education system (Staris, 1987: 178-200) with elementary education largely in Russian from the beginning of the century. Latvian was retained only for religious education and minimal instruction in the native language. From 1898 school libraries were allowed to spend government money on books in Russian only (Plakans, 1997: 72). School Russification abated after the 1905 revolution, but started anew in 1913.

But these developments could not stop the increasing use of Latvian and of publishing. This, together the remarkable popularity of theatre, went some way towards compensating for the restricted use of Latvian in official communication. Latvians were metamorphosing from an agricultural and patriarchal society into a modern nation with its own particular culture. Patriotic, democratic and social democratic ideas were spreading fast, disseminated by *the New Current* (*Jaunā*

strāva) activists and their newspaper *Dienas lapa* (1886). More conservative ideas of nationalism were voiced by the *Riga Latvian Society* (*Rīgas latviešu biedrība*). *The New Current* movement disappeared when the newspaper was closed down and around 60 of its activists imprisoned or exiled to Siberia.

The unresolved national, social and political issues made the 1905 revolution a potent one. It involved not only the landless peasants and workers but a broad swathe of society and of the Latvian intelligentsia. A certain liberalisation followed the revolution, leading to an explosion of new periodicals, while many Latvian literary figures and translators had emigrated, learning the culture and language of their new countries of residence. The cultural horizons of the nation broadened exponentially.

CENSORSHIP

Censorship was at its most severe at the beginning of the century and it included translations. The Russian Empire had a system of pre-censorship: texts were scrutinised before printing and decisions depended on the censor's individual personality and views (Veinberga, 2018: 162). Until 1895, censorship had been comparatively relaxed about socialist literature and ideas. But when workers' associations and strikes started (Plakans, 1981: 258), censorship grew in severity: 'a mood close to panic prevailed in Latvian literary circles', as more was banned than allowed (Limane, 2004: 36). At the turn of the century censors were particularly on the lookout for socialist, Marxist and anarchist ideas, often even detecting them in economic texts where they did not exist (Apiņis, 2004: 35). There were various ways of circumventing censorship, such as changing the names of authors, avoiding taboo terms like 'socialism' (Valters, 1969: 184) or 'the agrarian question' (Deglavs, 1926), or by publishing outside Latvia, for example in St Petersburg.

Censors even took objection to fiction, for example, performances of both Jānis Vidiņš's and Rainis's translations of Schiller's *William Tell* were banned. They forbade performances of several plays by Gerhart Hauptmann. Some were allowed after the revolution but *the Weavers* (*Audēji*) was forbidden altogether, and was published abroad (Vāvere, 1971: 39). Translations of works by Frank Wedekind, Garlieb Merkel, Ibsen and Tolstoy were banned – even though Tolstoy was allowed in Russian. Publication of *War and Peace* was allowed only in 1903, in connection with his 75th birthday. Performances of Goethe's *Egmont* were banned (Kalniņš, 1965: 103). Once a translator was considered unreliable by the censors his translations were also suspect, this was the reason why many of Rainis's translations were ascribed to Aspazija (Gudriķe, 1989: 10).

The activities of various religious denominations were neither allowed nor forbidden by law, but censors interfered in the publication of religious literature by Baptists and some other denominations. These bans were contested in court and eventually repealed. By contrast, the Orthodox church was supported, and its religious writings extensively translated into Latvian.

Censorship was not limited to banning publications. Repressive measures often followed. Thus, the translator Edvarts Treimanis was imprisoned for six months for publishing the Latvian writer Veidenbaums (Kalniņš, 1965: 301); the editor of the newspaper *Dienas Lapa*, Jānis Pliekšāns–Rainis, was arrested and held for two days for publishing forbidden texts in 1895. In 1897 the Minister of the Interior suspended the newspaper for eight months and its editors Rainis and Pēteris Stučka, likewise the literary critic Jānis Jansons-Brauns, were exiled to Vyatka in Russia for five years in 1899. Many literary figures, publishers and translators (such as Kārlis Jēkabsons, Miķelis Valters, Andrejs Birkerts, Antons Austriņš, Dāvids Golts (Zeltiņš), Augusts Golts, Fricis Roziņš-Āzis, Ernests Arnis, Kārlis Krūza, Jānis Roze, Rūdolfs Jēpe, Jānis Jankavs, Pauls Dauge, Juris Kosa/Mauriņš, Pauls Skrābāns, Linards Laicens, Augusts Melnalksnis, Akuraters and Apsesdēls) were imprisoned and exiled after the 1905 revolution. Kārlis Skalbe fled with his wife and was imprisoned on return. Rainis and his wife Aspazija escaped to Switzerland. A major publisher, Jānis Ozols, and the poet and translator Jūlijs Dievkociņš were shot.

The revolution achieved a certain liberalisation: among the moderate concessions in the *October Manifesto* was the freedom of speech and the press. Post-censorship was now instituted instead of the pre-censorship used previously. The censor could now stop sales of a work, but only after the ban had been confirmed by the courts. This meant the banned works could actually be spirited away and disseminated. Thus, many formerly banned works could be published. Numerous periodicals could be established in the more liberal atmosphere and a wider range of issues debated. Various loopholes in the application of the law could be found in the moot censorship situation (Zvirgzdiņš, 2018). Thus, the censors confiscated Miķelis Valters's book on the ethnic issue, *Mūsu tautības jautājums (Our Issue of Nationalism)*, in 1914 but failed to eradicate it (Treijs, 2012: 45). Statistics show that 96 Latvian books were banned in the period between 1906 and 1913 (Apīnis, 2004: 42).

THE FOUNDATION LAID IN THE 19TH CENTURY

In order to understand the situation at the beginning of the 20th century it is necessary to evaluate the achievements of the 19th (Apīnis, 1991). Translations of serious classics and well-known contemporaries began to appear at the end of the century. The Neo-Latvians' idea that other nations' experiences and achievements should be employed in shaping Latvian culture and nation was bearing fruit. 'The nineties were a proud and messy time, when for the first time the cultural sources of Western Europe were thrown open to the Latvian nation' (Klaustiņš, 1908: 124-124). Despite Russification the current of Western intellectual life was becoming ever more important for Latvians (Zeiferts, 1903).

The number of Latvian titles published was growing fast. While slightly more than 30 books were published in 1856, the year 1860 saw already around

60 (Apinis, 1977: 162), 105 in 1875, 144 in 1885 (ibid.: 240) and 259 in 1895 (ibid.: 297). Despite increasing Russification, Latvians had grown accustomed to reading in their own language in the second half of the century. Literacy and publishing statistics both testify to this.

The last decades of the century were still dominated by sentimental and adventure stories, translated from German with the traditional long titles. Thorough localisation often makes it impossible to determine what is a translation and what an original writing, for example, Ernests Dinsbergs and Ansis Leitāns took a totally free approach to the original (which could today be interpreted as a very advanced approach to the target audience within the *scopos* theory). However, the late 19th century also saw longer translations, for example, extended sentimental novels. As regards serious literature there were many translations of Heine, the brothers Grimm, Goethe, Schiller, Sudermann, Peter Rosegger, and numerous didactic stories by Franz Hoffmann. Latvian readers also had access to numerous Russian translations, with works by Turgenev, Lermontov, Pushkin, Chekhov (around 20 titles including the collected works), Tolstoy, Gogol, Nekrasov (in periodicals) and, at the end of the century, Gorky and Dostoyevsky (two novels). At the end of the century Scandinavian translations became popular alongside the traditional German and growing Russian menu. The early Nordic translations were exclusively done via German. English literature (Vilsons, 1971) was represented by Kipling, Dickens, Scott, Milton, Shakespeare, Byron, Hardy, Burns, Twain, Kipling. French literature was represented by translations of Maupassant, Zola, Daudet and Mérimée, and four novels by Verne, adapted and simplified. There were many translations of Polish authors such as Henryk Sienkiewicz and Adam Mickiewicz. The end of the century saw particular attention paid to Goethe, who was seen as a benchmark of the Europeanness that Latvians should strive for (Vecgrāvis, 2002). There was an abundance of translations of Goethe, both good and bad. There were also attempts to translate *Faust* (Zālītis, 1999). Jēkabs Māsēns and Kārlis Jannaus translated *Faust* before Rainis, but their translations remained unpublished. Rainis's translation of the *Prologue* appeared in the periodical *Mājas Viesa Mēnešraksts* in 1896, the rest followed in the subsequent editions in 1897. The book was published in 1898 (Note 1) and the translation was immediately recognised as an innovative landmark and a brilliant accomplishment. Rainis was deemed to be a 'congenial translator' (Note 2). In the 20th century Ansis Gulbis published Goethe's works translated by Rainis and Aspazija in seven instalments in 1903-1904.

Basic science and research publications in the mid-19th century were limited to schoolbooks (plus a number of books on geography and practical agriculture) but this changed towards the end of the century (Zanders, 2013: 333). The 1890s saw a diversification of translations. There were anthologies, collected works, selections, encyclopaedias and almanacs. Although German works retained their dominance, there was also an increase in translations from other languages. This was to a large extent a conscious process, since Jēkabs Velme, editor of *Austrums*, had pointed out that Latvians had grown so accustomed to German literature as

to be unable to understand products from other nations (Zanders, 2015: 204). The situation had to change.

It was normal not to pay the translator for periodical publications in the late 19th century, the translator just received a free copy of the newspaper or magazine. This meant that many potential translators with a good knowledge of languages and feel for style found other occupations, while translation work came into the hands of amateurs who did not care for quality: ‘The fee, half a kopeck for a 40-character line, came into being only around 1900’ (Melnalksnis, 1944: 2). The rudiments of translation criticism also emerged.

The second half of the 19th century saw the end of the long period when translations into Latvian were done by non-Latvians, mostly German pastors. Now the translators were native Latvians, some were gifted, others were poor amateurs. There was a change of generations around the turn of the century, with many productive translators dying around this time: Kārlis Stālberģis, Kārlis Krons/Croon, Vensku Edvarts, Berģu Jānis, Dinsbergs, Heinrihs Alunāns, Klāvs Ukstiņš, a.o.

But the following translators remained active also after the turn of the century: Fricis Adamovičs, Ādolfs Alunāns, Heinrihs Alunāns, Apsīšu Jēkabs, Jānis Asars, Andrejs Augstkalns, Bebru Juris, Ernests Birznieks-Upītis, Rūdolfs Blaumanis, Juris Brīvkalnieks (Georgs Freibergs), Kārlis Brīvnieks, Fricis Brīvzemnieks, Augusts Deglavs, Diženajo Bernhards, Jēkabs Dravnieks, Jēkabs Duburs, Jānis Aleksandrs Freijs, Krišjānis Goldmanis, Jānis Inķis, Jēkabs Janševskis, Klāra Kalniņa, Matīss Kaudzīte, Jānis Kļaviņš, Lapas Mārtiņš (Rujenietis), Jēkabs Lautenbahs, Jānis Lauva, Teodors Lejas-Krūmiņš, Līgotņu Jēkabs, Jēkabs Māsēns, Mednieks Jorģis (Haralds Jēgers), Augusts Melnalksnis (Melnais Alksnis), Krišjānis Nātra, Ludvigs Pauls, Ērmanis Pīpiņš-Vizulis, Jēkabs Purkalītis, Jēkabs Rempētērs (Liekais), Riemelis, Fricis Roziņš-Āzis, Jānis Rucelis (Sobolietis), Augusts Saulietis, Matīss Siliņš, Sniegonis (Ādolfs Ģērsens), Andrejs Stērste, Jānis Straume (Vaidelotis), Andrejs Sturms, Sudraba Edžus, Edvarts Treimanis-Zvārgulis, Antons Tullijs, Valdis (Voldemārs Zālītis), Late Veibele, Veismaņu Jānis (Pavasaru Jānis), Jānis Vidiņš, Kārlis Vilķers (Zvanpūtis), Mārcis Ziraks, a.o.

TRANSLATIONS IN EARLY 20TH-CENTURY PERIODICALS

1 TRANSLATIONS IN MAGAZINES

The most prominent feature of the 1900–1914 period was the abundance of translations in periodicals. It is sometimes characterised as an inundation, never seen before or since. As pointed out above, the tradition had already started earlier: the first Latvian literary magazine *Pagalms* (1880/81–1884, editor Lautenbahs) had published the Grimm brothers’ fairy tales translated by Apsīšu Jēkabs, occasionally attributed to the translator (Stepiņš, 1970: 24), as well as

poetry by Ovid and Heine, stories by Beecher Stowe, Turgenev and Lucian with commentaries by the translators Georgs Freibergs and Juris Brīvkalniēks. This magazine was followed by *Rota* (1884–1888), and *Austrums* (1885–1906), published in Moscow, Jelgava, Rīga and Cēsis offering a good selection of Goethe, Pushkin and Lermontov as well as various novels in instalments. *Mājas Viesa Mēnešraksts* (1895–1905, editor Pēteris Zālīte) published extensive translations, modern and classical, and numerous translated plays.

After pre-censorship was abolished, it became easier to establish periodicals. While previously this sphere had been dominated by a few relatively thick magazines covering a broad range of topics, the new periodicals tended to target their readers with a clear ideological or literary position. Many though were short-lived, others were stopped after the revolution: *Apskats* (1902–1905), *Vērotājs* (1903–1923), *Kāvi* (1905–1906), *Ziemas Naktis* (1906–1907), *Pret Sauli* (1906), *Dzelme* (1906–1907), *Svari* (1906–1907), *Stari* (1906–1908, 1912–1914), *Zalktis* (1906–1909), *Rīts* (1907), *Vārpas* (1908), *Tekas* (1909/10–1915), *Mājas Viesis* (1909–1910), *Izglītība* (1909–1911), *Domas* (1912–1915), *Vārds* (1912–1913), *Druva* (1911/12–1914) and *Skatuve un dzīve* 1913–1915). The instability was, of course, to some extent also determined by the limited readership, which made the enterprise unprofitable. However, some, like *Druva*, published numerous high-quality translations.

The authorities monitored publications attentively, thus *Rīgas avīze* (6. 2. 1900) referring to the Stolipin's circular about the compulsory registration of associations mentions the Russians' distrust of Latvians. This supposedly stems from the activities of such new papers as *Vārpas*, *Dzīve*, *Jaunā Dienas lapa*, while 'the proper Latvian movement has always been moderate, anti-revolutionary and friendly towards the government and State'. The newspapers and magazines mentioned had published unwelcome translations extensively.

2 TRANSLATIONS IN NEWSPAPERS

There were several well-established Latvian newspapers at the turn of the century, among them the first newspaper in Latvian *Latviešu Avīzes* (1822–1915) as well as *Mājas Viesis* (1856–1910) (Zelče, 2009), *Tēvija* (1884–1914) and *Baltijas Vēstnesis* (1868–1906, 1917–1920) (Grigulis, 1992: 58-66) linked to the *Riga Latvian Society*. After its closure it was followed by the largest circulation *Dzimtenes Vēstnesis* (1907–1917), with an extensive literary supplement carrying translations, criticism, informative articles of the literary scene abroad. A similar one was *Balss* (1878–1907), also with a supplement. A progressive socialist newspaper was *Dienas lapa* (1886–1905, 1913–1914), which used various titles in order to elude the censors: *Jaunā Dienas Lapa* (1905–1906), *Mūsu Laiki* (1906–1907), *Jaunā Dienas Lapa* (1907), *Mūsu Dzīve* (1907), *Baltija* (1907), *Rīgas Apskats* (1907–1908) and *Jaunā Dienas Lapa* (1908–1918). Each newspaper carried a novel in instalments.

As with magazines, new newspapers sprang up after liberalisation: *Rīgas avīze* (1902–1915), *Spēks* (1905), *Dzimtene* (1905–1906), *Dienas apskats* (1905–1906), *Darbs* (1906), *Latvija* (1906–1915), *Jaunais laiks* (1911–1930), *Jaunākās Ziņas* (1911–1940), *Lūdums* (1913–1919). For many the circulation figures were high: 75,000 for *Dzimtenes Vēstnesis* (1913) and 80,000 for *Jaunākās Ziņas* (1914) (Bērziņš, 2000: 496–497). In total there were 59 periodicals in Latvia on the eve of the First World War, most of them magazines.

Periodicals published numerous translations, a lot of poetry (rarely in book form), stories, essays, plays and novels. Thus, an average of two German novels were published in book form annually, but 3–4 in periodicals during this period (Daukste-Silasproģe, 2005: 584–5). Occasionally, translations in periodicals were republished in book form later. Translations in periodicals often omitted the translators' names or used undecipherable pseudonyms (*Latviešu*, 1902: Vii) and the titles frequently had been changed beyond recognition.

As there was stiff competition between the numerous periodicals, they tended to attack competitors for real or perceived mistakes and errors. *Mājas Viesa Mēnešraksts* and *Mājas Viesa literāriskais pielikums*, for example, published numerous translations. This was not to the liking of competitor *Baltijas Vēstnesis*, which kept finding fault with its rivals, usually pointing out language mistakes in the translations (Melnalksnis, 1944: 2).

BOOKS IN THE 20TH CENTURY

The book industry expanded fast in the first decade of the century and there was rapid growth of printing shops. In 1910, there were 79 printing shops, 45 of them in Riga, and most of them belonged to Latvians which was new development compared to the 19th century (Karulis, 1967: 116). Books were published not only in Riga and Jelgava, but also in minor towns, like Cēsis, Liepāja, Valmiera, Kuldīga, Limbaži and Piebalga.

Translations tended more and more to be of contemporary works about contemporary life and problems. Although the tendency towards Romanticism persisted and there was the traditional devotion to translating plays, gradually Latvians could read more contemporary works, as well as scientific literature. However, the Latvian writer and translator Kārlis Skalbe commented in 1908 that Latvians still remained the 'calendar-reading nation' and calculated that the number of 'people of culture' was around one thousand (Skalbe, 2002: 363–365). Calendar circulation indeed was in the tens of thousands, while book impressions usually hovered around 1000–2000.

The new century started with an ambitious work, indirectly pointing towards the trend of translations: an extensive anthology of world literature (Note 3), edited by Teodors Lejas-Krūmiņš and offering sample translations and information on foreign writers. It was also marked by yet another translation of Ibsen's *Nora* in book form, thus starting the series of Ibsen's plays which were

so popular at this time: Ibsen's *Nora* had been translated eleven times by 1902 (*Latviešu*, 1902: 89).

There was more translation than original writing and the quality was varied. This was recognised by the *Riga Latvian Society* in its review published in *Mājas viesis* (Note 4): 'The list of translations shows that they outnumber originals. Next to the works of genius there are third-rate productions, and the world of eternal ideas is invaded by coarse jokes and vulgarity'. The experts reported that banal plays were still localised by the elderly actors, but there was a demand for these plays. They listed authors and works that should be translated and it was stressed that translations should be from the original languages.

Apart from books in Latvian, books in other languages were also published in Latvia, mostly in German, Russian and Estonian. After the ban on Lithuanian was rescinded in 1904, Lithuanian books were also published in Latvia, reaching 15 titles in 1905 (*Ivbule*, 2006: 71).

The number of Latvian titles published was stable at the beginning of the century, above 200 books annually. During the last decade of the 19th century the number had fluctuated between 100 and 200. The peak was reached around 1910. Statistical data in previous studies have been unreliable, offering higher figures. It is possible that they include other types of printed material: sheet music, posters, programmes, newspaper supplements, books in other languages, etc. Thus, Plakans gives the following figures: 181 in 1884 and 822 in 1904 (Plakans, 1996-1997). Karulis suggests 731 in 1902, followed by 931 in 1903 and 822 in 1904 (Karulis, 1967: 121). Bērziņš gives 869 for 1913 (Bērziņš, 2000: 501). These are the figures generally quoted.

Our figures are based on Latvian National Library bibliography database (Online 1) and are much lower. Of course, some books may have been lost but the figures are as follows: 99 in 1884, 192 in 1892, 177 in 1894, 237 in 1900, 245 in 1901, 234 in 1902, 280 in 1903, 292 in 1904, 252 in 1905, 256 in 1906, 295 in 1907, 398 in 1908, 371 in 1909, 416 in 1910, 213 in 1911, 301 in 1912, 203 in 1913, 285 in 1914, 62 in 1915.

About half the books were fiction and the majority were translations. Some translations had been published by newspapers earlier. Thus, when permission was finally given to translate Tolstoy's *War and Peace* in 1903, the newspaper *Baltijas vēstnesis* gave it to Dievkociņš, but when he fell behind the deadlines it was given also to Jānis Rucelis. At the end of the year the novel appeared in book form with the translators' initials and a note that the first two chapters were translated by Dravnieks and the rest by pastor Rucelis (Note 5).

THE PUBLISHERS

Since the spectacular growth of Riga much of the publishing moved over from the traditional printing town of Jelgava to Riga at the end of the 19th century. Pūcišu Ģederts was the biggest publisher at the end of the 19th century, followed

by the newspaper publisher *Dienas lapa* (Peile, 1970: 64) and Augusts Golts. Henrihs Alunāns, the first Latvian publisher of scale, established in 1867, continued publishing in Jelgava and was active until 1914. Jānis Aleksandrs Freijs (a baptist pastor) started publishing in 1885 and continued producing numerous small-scale religious, spiritual and didactic works. His production is said to have exceeded 800 titles (Tervits, 1999: 81), but we can be sure of only around 300. One of the biggest publishers at the beginning of the century was *Ozola apgāds* in Cēsis (1895–1906) (around 200 titles) but he specialised in originals.

In its turn the *Useful Book Department of Riga Latvian Society* (*Rīgas latviešu biedrības Derīgu grāmatu nodaļa* (RLB DGN)) focused on the systematic translation of foreign literature, reference and science books. It was established in 1886 and operated as a subscription system, the books costing 10-25 kopecks. In contrast to the Latvian Society, it was more liberal, produced various educational books on foreign countries and even published Gorky's works of socialist orientation in 1901. The RLB DGN published around 15 titles a year. Each year it planned to publish a quality play in a new translation (Zanders, 2004: 73). Its series *Writers of other nations* (*Citu tautu rakstnieki*) was clearly aimed at expanding knowledge: the books contained biographies and information on the authors' other works. From 1907 the editor of the series was Lejas-Krūmiņš, who insisted on quality and translated himself. He turned out *Northerners' novelettes* in 1907, *Southerner's novelettes* in 1908, *Slavic stories* in 1911, *the New German novelettes* in 1913. The DGN series published a total of 25 titles containing works of 89 writers in the period from 1894 to 1915. DGN published translated fiction (for example, *King Lear* translated by Rainis in 1900) as well as books on geography, foreign countries, physics and other sciences. Pēteris Bērziņš started large scale publishing in the last decade of the 20th century. Dravnieks continued to publish various books, many translated by himself.

New publishers started up alongside the existing ones, and some of them were to become most important for Latvian publishing. *Gulbja izdevniecība* was established in 1903 (the books were also printed in St Petersburg, where censorship was laxer). Oskars Jēpe started publishing in Cēsis in 1905. Birznieks-Upītis established *Dzirciemnieki* (1908–1914) that published Latvian originals and numerous translations of Tolstoy, Gogol, Chekhov, Maupassant and other well-known writers.

Andrejs Jesens established the *Youth Library* (*Jaunības bibliotēka*) series in 1908/1909. It soon became *Jaunības tekas* (1909–1915) and published several translated stories. Parallel to that, his publishing house *Jesens apgāds* was established in 1910. He also established the *General Library* (*Vispārīga bibliotēka*) series (1912–1914) which sold small booklets, mostly of translated works, for 3 kopecks. Jesens's publications did not generally name the translator.

Finally, two publishers established in 1912 would have a remarkable future after the war: *Valters un Rapa* and *Jānis Roze*.

On the other hand, many publishers were very short-lived. Dievkociņš established the series *the New Library* (*Jaunā bibliotēka*), but only published two titles (Ķuzāne, 1980: 204): one was by him and the other translated by Edvarts Treimanis-Zvārgulis. Some series were published by more than one publisher, for example, the *Drama Library* (*Dramatiskā bibliotēka*) was issued by Rihards Millers, Augusts Golts and Pēteris Saulītis.

A particular place in publishing and translation is occupied by Ansis Gulbis (1873–1936) and his *Universal Library* (*Universālā bibliotēka*). He was fascinated by the literary achievements of Dravnieks and Andrejs Pumpurs in his early days, was later supported by Rainis and entered publishing around the turn of the century (Zanders, 2015: 373). Gulbis moved to St Petersburg in 1900 working for a Swiss trade company. There he established a publishing house in 1903 and announced subscriptions for various collected works, starting with Goethe, translated by Rainis and Aspazija (Note 6). Rainis was both the editor and translator for Gulbis. Publishing in St Petersburg was cheaper, and the censors were easier to deal with. He turned out six or seven booklets a month for the low price of 10 kopecks.

After the revolution his activities slackened as he felt insecure since he had published works of Marx and Karl Kautsky during the revolution. However, in 1911 he established the *Universal Library* series with far-reaching goals. The idea was borrowed from the German *Universal-Bibliothek* (*Verlag Philipp Reclam*, 1867) that specialised in classics. Rainis, living in exile in Switzerland, was again engaged as the editor and main translator. He wrote: ‘Latvians must become a cultural nation, and the only way to achieve that is by capturing the universal, the whole of world literature for themselves’ (Rainis, 1985: 410). Accordingly, he drafted a system of works to be published, focusing on world classics and introducing Latvians to European culture. The list included works by Ibsen, Goethe, France, Heine, Hauptmann, Nietzsche, Wilde, Shakespeare, Pushkin, Gogol, Tolstoy, Turgenev, Lermontov and Hauff, and important science books such as Darwin’s *On the Origin of Species*. At first, Rainis planned to translate everything himself, but he later dropped the idea and looked for other high-quality translators. He was merciless in his criticism, finding even Kārlis Skalbe not professional enough. Like *Reclam Verlag*, the series was started by Goethe’s *Faust*. In the first two years around 100 booklets were published, and over 200 before the outbreak of war (Karulis, 1977: 159). The print runs were large. Apart from Rainis, major translations were done by Aspazija, Jānis Jaunsudrabiņš, Kārlis Skalbe, Aleksandrs Būmanis a.o. The booklets were small, in yellow softcovers, and in a dense print, but they were cheap (10 kopecks). Rural schools received free copies. Parallel to these, separate translations by Rainis were published in quality editions (20–40 kopecks). The series offered a hitherto unprecedented overview of foreign writing to the Latvian reader, only some of the books had been translated before (Goethe, Nietzsche, Gogol).

The First World War interrupted this undertaking. However, Gulbis resumed publishing in Riga in 1918 and many of the earlier translations were republished.

TRANSLATIONS

Translated literature fostered an evolution in Latvian literary taste (Daukste-Silasproģe, 2015: 232) and served as a conduit of modernity. Translations appeared both in books and periodicals. Poetry was mainly published in periodicals, and extensively in *Mājas viesā literāriskais pielikums* and *Mēnešraksts*, *Austrums* and *Dienas lapa*. Periodicals in this period to a large extent served as book substitutes, as they carried numerous short story and novel translations. The era of extensive periodical translation in fact ended with the First World War. The choice between publishing in periodicals or book form to some extent also determined the approach to translation and its quality: translations in periodicals were frequently abridged and cut, passages were deleted to meet layout and space requirements, translations were more superficial, and the translator was frequently not identified.

Almost simultaneous publication of different translations of the same work was a frequent phenomenon both in periodicals and book form. In some cases, it seems the translators and publishers simply did not know what the other was doing. In other cases, it was deliberate, to demonstrate the translator's ability and mastery. Thus, Vilis Plūdons's translations of Lermontov's poems were followed by Dievkociņš's, who thought he could do better (Kuzāne, 1980: 156).

Parallel to the quality works, easy reading continued to be published in free translations and with the traditional long titles (Note 7). Broader knowledge of other languages than German meant that more works were now translated from the original languages. Use of German as an intermediary language decreased, while that of Russian in this function was on the increase. However, German still was the main conduit for foreign works. Thus, while Adamovičs was translating Shakespeare from English (*Julius Caesar*, *Macbeth* and *Richard III* in 1902) (Note 8), Rainis was translating *King Lear* (Note 9) from a German text at least at first, as the English original could not be obtained. The above-mentioned *Julius Caesar* is notable also for its translator's preface and historical introduction and extended paratexts providing information on Shakespeare, Ancient Rome and its leaders. There were also footnotes with various explanations, occasionally referring to Russian and French sources. Footnotes are also provided in the text of the play. Thus, it can be considered an academic translation.

The dominance of German works was gradually decreasing. At the end of the 19th century, English and French translations constituted around 4–5 per cent, Russian about 8–9 per cent and German around 70 per cent (Apīnis, 1977: 314). The number of Russian translations grew partly because of Russification and an improving command of Russian among educated Latvians, partly because so many great Russian writers were active during this period. It should be noted that the Russian originals translated were generally of higher quality than the German ones (Novērojumi 1905: 232); although pulp literature did also exist in Russian, it was rarely translated.

The tradition of translating plays continued on a large scale. Ibsen tops the list with 13 plays, he is the most popular foreign playwright of the period of 1900–14. Every year four to eight German plays were translated. Hauptmann was the most popular with eight plays published, and several more staged (Daukste-Silasproģe, 2005: 611). Some translators specialised in drama and a special series *the Small Theatre (Mazais teātris)* (1901–23), vol. 1–9, was translated and edited by Lejas-Krūmiņš. Translations and performances of foreign plays attracted extensive criticism and analysis.

Various almanacs, anthologies and collections were published. Thus, Ermanis Pīpiņš-Vizulis met the new century with a collection *the Harvest of Other Nations (Cittautu raža)* 1899–1901 in two volumes, where Ozols involved the best translators (Note 10). See also LejasKrūmiņš' series above. Plūdons translated a collection of 55 contemporary German poets (Note 11). Occasionally the plans fell through, for example, Jānis Kārstenis (Šmits) offered Gulbis a manuscript of contemporary Russian poetry, but for various reasons it was never published (Sproģe, 2002: 23).

Specific foreign authors were extensively translated sometimes. Towards the beginning of the century there are numerous Hungarian translations: Móric Jókay and Kálmán Mikszáth, the novels are translated both in book form and in periodicals such as *Baltijas vēstnesis*, *Dienas lapa*, *Rīgas avīze*, *Tēvija*, *Austrums* and *MV mēnešraksts*, in the latter often without the translator's name. Some works, like Jokaji's *Zilacīte*, appear in newspapers as well as book form (with a translator's preface) (Note 12). Some Mikszáth's stories were translated several times with different titles, there are often elements of localisation.

There was a gradual growth of translator's or editor's paratexts, thus when a translation of Arthur Bernède's book about Paris life was published it was introduced by an editor's preface stating that the book had had 25 impressions in Paris and should be perceived as a warning about the depravity of French modern civilization, that one 'should fear and flee' (Note 13).

Translators and publishers reacted to the political issues of the time, thus there are numerous translations from German (Note 14) dealing with the Boer Wars (1880–1881, 1899–1902) around the turn of the century.

1 TRANSLATIONS FROM GERMAN AND RUSSIAN

Translations from German were as yet dominant, especially in the domains of poetry, romantic stories and plays, and pulp literature. Some extremely popular authors of the period are today generally forgotten, for example, the Austrian writer Peter Rosegger whose stories about peasant life in the mountains virtually inundated the periodicals. A similar interest in Frank Wedekind (two translations of one novel in one year (Note 15)) subsided after 1910. Periodicals dwelled at length on what was happening on the German literary scene, for example, Thomas Mann's *Buddenbrooks (Budenbroki)* even though the works discussed had not usually been translated. There was a great deal of interest in

naturalism. German ideas, German culture and German views on what should be translated from other languages are strongly dominant. Although there was already an established focus on Goethe, Schiller and Kleist, more and more contemporary literature appeared, centring on city life and problems, women's experiences, socialism and aesthetic issues. Plays of Hauptmann and Sudermann were frequently translated, staged and discussed. Every year around half a dozen German plays were translated, totalling 68 in the period under discussion. Poetry was rarely published in books but dominated in periodicals. Similarly, short stories abounded in periodicals (Daukste-Silasproģe, 2005: 581). There were also twice as many German novels published in periodicals as in books (Daukste-Silasproģe, 2005: 585).

Merkel's *the Latvians* (*Latvieši*) was finally translated and published more than a century after the German edition, as well as his other works (Note 16). The demand for *the Latvians* was huge, the first impression of 5000 sold out immediately and 5000 more were printed. Merkel's *Wannem Ymanta* (*Vanems Imanta*) (Note 17) was translated twice (Būmanis and Lizete Erdmane) in a single year. Another earlier translation by Birznieks-Upītis had been banned by the censors (Apīnis, 2004: 35). *New German Novels* (*Jaunas vācu noveles*), compiled and translated by Lejas-Krūmiņš (Note 18), as well as Plūdons's anthology of *Modern German Poetry* (*Modernā vācu lirika*) appeared in 1913. With the beginning of war in 1914 German translations virtually stopped.

Translation from Russian was growing fast, led by Tolstoy: 55 titles in the period, and again there were parallel translations even in one year (Note 19) and numerous repeated editions despite censorship objections to several of his works (Apīnis, 2004: 37). A great number of Tolstoy titles were published in the two years following his death in 1910. Gorky scores 23 translations in the period, Chekhov 15 and Pushkin 8. There were also several translations of less-known authors like Leonid Andreyev and Vsevolod Garshin.

Some works were translated several times: Upītis translated Gogol's *Revident* for Gulbis although there was an 1871 translation by Alunāns. Fricis Brīvēznieks's translation of *Taras Bulba* was republished after half a century (Note 20). Gogol's *Dead Souls* (Pīpiņš-Vizulis' 19th century translation) was slightly edited and published again.

This period was characterised by an interest in contemporary Russian poetry, especially attractive to Latvian poets and translators disposed towards decadence (Sproģe, 2002). The translated poetry was published mostly in the magazines *Stari* and *Dzelme*. Viktors Eglītis was prominent among the translators, having published a collection of translations and numerous translations in periodicals, especially in *Mājas Viesa Mēnešraksts*. Antons Austriņš, Edvarts Virza, Kārlis Jēkabsons and Kārlis Krūza also produced numerous translations. Some translations suffered an unfortunate fate: the magazine *Dzelme* started publishing Bryusov's novel *the Fiery Angel* translated by Dambergs and retitled *My Biography* (*Mana biogrāfija*) in 1907, but it was cut short abruptly. In 1908

the magazine *Stari* made a fresh attempt with a translation by Austriņš, but it was abridged and was soon abandoned. In the first instalment it was promised that translator's explanatory notes would be provided at the end of the novel. In the second instalment some translator's footnotes appeared, but this was also the end of the publication effort. Many technical, legal and government texts were translated from Russian as well. The period also saw the continued translation of the traditional simple and cheap plays (*spēļu/joku lugas*) (Note 21) and pulp literature (Note 22).

2 LITERATURE OF THE BALTIC NEIGHBOURS

Translations from Lithuanian were rare at the end of the 19th century, for several reasons. First, printing in Lithuanian was forbidden in tsarist Russia. Although the ban was lifted in 1904, inertia continued up to the First World War. Second, Lithuanian literature had a very strong religious slant which seemed anachronistic to Latvians. As late as 1909, out of the 155 books published in Lithuania, 125 were religious (*Latvieši*, 2008b: 550), corresponding to the 80 per cent religious publications in Latvia a century earlier. In the period before the First World War not a single translation from Lithuanian appeared in book form. Some short stories and poems as well as a couple of plays appeared in the periodicals. This is quite paradoxical considering that the languages are close and there were even proposals to create one united country circulating during the War.

Estonian was a different story: the similar historical development in the Lutheran German-dominated space and the role of the Dorpat University in the formation and education of Latvian intellectuals was of importance. Thus, the first translation from Estonian dates from 1856 (Note 23). There were many translations of Kreutzwald's writings. At the end of the 19th century Estonian short stories were frequent, mostly translated by Lapas Mārtiņš (Note 24), who also wrote numerous informative articles on Estonian literature and life. Augusts Gailits joined him in early 20th century: he was half-Estonian and regularly wrote on Estonian literary affairs in *Dzimtenes vēstnesis*, focusing on the similarity of processes in both countries. Short stories and poetry translations were frequent in periodicals. Two Estonian plays were performed in 1914, but they were not published (*Latvieši*, 2008a: 222). It is notable that the Estonian epic *Kalevipoeg* was translated also by Rainis, fragments were published in 1904.

3 NORDIC LITERATURE

Interest in Nordic literature first arose at the end of the 19th century, no doubt stimulated by the similarity of mentality and living conditions. As interest grew, it came to dominate the Latvian literary polysystem in the 1920s-30s. Scandinavian sources on agricultural topics (see further) were also translated, usually with some adaptation. The beginning of the century saw a serious interest in Finnish literature, resulting in five books and around 130 other publications (Jundze, 2002: 212), mostly short stories. This was the most productive period

of translations from Finnish into Latvian. The works were mostly descriptions of farmers' lives and, although it was usually stated that the works were translated from Finnish, they were in fact translations via German or Russian. As Finland was also part of the Russian Empire some translations of the 1905 Revolution period reflect the protests of the time. Translators either muted or strengthened the revolutionary fervour depending on the situation, for example, Juhani Aho's staid content is occasionally toned up by emphasising the struggle between darkness and light. Many translators were amateurs, and the works were freely abridged, but some were translated by quality translators: Birznieks-Upītis, Aspazija, Gailits and Austriņš. Moreover, some works were translated several times, not with the aim of achieving higher quality but simply because nobody knew what had already been done. The record goes to a short story by Aho that sported 10 translations with 5 different titles by 1917 (Jundze, 1994: 19). Aho and Johannes Linnankoski were very popular, with novels published in periodicals and one (Aho's) in book form.

The Danish link continued with Andersen's fairy tales (Daukste-Silasproģe, 2002). RLB DGN produced nine collections translated via German by Apsišu Jēkabs in 1911–12. Noteworthy is the first real translation of the 18th century Danish-Norwegian (Borum, 1979: 20) classic Ludvig Holberg's *Jeppe of the Hill, or the Transformed Peasant* (*Žūpu Bērtulis*) (Note 25) done by Augusts Melnalksnis. The localisation of the same work entitled *Lustes spēle* by Jaunais Stenders had been extremely popular for many decades, as is noted in the translator's preface. Contemporary Danish authors translated include Holger Drachmann, *Martin Andersen Nexø*, Herman Bang and *Karin Michaëlis*.

Swedish literature was very popular: around 40 stories by Strindberg (Kalnačs, 2002) as well as his plays, and these were direct translations from Swedish (Note 26). While in the 19th century Strindberg had been present in periodicals, several books were published before the war. Lagerlöf had around 100 translations in periodicals and 8 books. Hedenstierna, who had been most popular, was gradually losing his position: 70 publications and one book of stories.

Norwegian literature had been known since the end of the 19th century, mostly from stories and poems of Bjørnstjerne Bjørnson in newspapers and magazines and an occasional book. Five books of his works were translated in the period before the war. But the real focus in the 20th century was on Ibsen, with 13 works published. *Nora* appeared in book form in 1900, translated via German by Treimanis-Zvārgulis (Note 27). This was after 10 other translations. Ibsen's plays were translated by prominent Latvian literary figures Rainis, Blaumanis, Degļavs, Atis Ķeniņš, Jēkabsons, Ligoņņ Jēkabs and Jānis Akuraters. The earlier translations are via German, but originals were used after the 1905 revolutions, when several Latvian writers had escaped to Norway. Moreover, these translations remain perfectly readable today (Burima, 2007: 462).

The second focus was on Hamsun (Burima, 2002: 333). The year 1900 saw Jānis Straume's translation of *Victoria* in the *Tēvija* literary supplement. The same

year the novel was translated by Jānis Asaris and published in *Dienas Lapa*. Next it was published as a book, translated by the aspiring young translator Roberts Kroders (Note 28). It is noteworthy that the original had been published only recently, in 1898. Hamsun's *Famine* was published in an abridged version in *Mājas viesā literārais pielikums* in 1903, and in 1904 as a book in Valmiera (Note 29). Later it was also translated by Kārlis Skalbe. In 1906 *Stari* published the novel *Pan*, translated by Jaunsudrabiņš. In 1910 it was published translated by Straume. Kārlis Skalbe produced several other translations of Hamsun's works.

4 OTHERS

As regards English literature, translation of Shakespeare continued: six titles, some of which are earlier translations. Walter Scott had three in the 19th century, the beginning of the 20th saw four more novels, but then he disappeared. His books were translated by Deglavs and Paegļu Mārtiņš. But the Latvian reader gained access to contemporary English writers as well: three novels by H.G. Wells (in one of which he was called an American writer) (Note 30), and works by Galsworthy (Note 31), Jerome K. Jerome (Note 32). Also, two titles by Hardy: *Jude* (Note 33), and *a Pair of Blue Eyes* (*Zilās acis*) in a periodical and in book form (Note 34).

However, the greatest interest was in Oscar Wilde (Note 35): six books and numerous publications in magazines. This was the result of interest in the concept of decadence (Kačāne, 2015). Several of his essays and fairy tales were translated by Cemeru Zande (Brūniņš), Arturs Bērziņš, Upīts, Jānis Grīns, Jānis Stakalders, Leons Paegle, and others, generally via German and Russian. Many of the shorter works were translated several times, with various titles and often without translators mentioned. The magazines of a decadent disposition also published Wilde's programmistic works: *Stari* published *a Florentine Tragedy* (*Florentiskā traģēdija*) in 1907, translated by Fricis Bārda, *Skatuve* published *Salome*, translated by Fricis Jansons in 1907, *Latvija, Literārais pielikums* published *De Profundis* in 1910, translated by Jānis Ezeriņš.

Stories by Sir Arthur Conan Doyle were published in periodicals (starting with 1898), in instalments (Note 36), and adaptations of Sherlock Holmes stories were made for the theatre. There were two editions of another *Robinson Crusoe* (*Robinsons Krūziņš*) in a new translation (translator unknown) (Note 37). It was again not the real *Robinson* but, in comparison with the early translation and its many subsequent abridged variants (Veisbergs, 2017: 62), a much more complex, informative and didactic work with a religious twist. The book had an appendix describing the stages of the development of the human race and relating them to the activities in the novel. The translation provided didactic subtitles and footnotes explaining various exotic and scientific terms. Two novels by Jack London and some translations of Mark Twain stories introduced Latvians to contemporary American literature.

French was represented by four Jules Verne titles in free translation, Anatole France's stories in books and magazines, some novels and a play by Victor Hugo

(Note 38), Gustave Flaubert's stories, two novels by *Emile Zola* and one by *Prosper Mérimée*.

Polish literature was dominated by four books by Stanislaw Przybyszewski, plus four translations of Henryk Sienkiewicz's works, the most outstanding being *Quo vadis?* (*Kurp eji*) translated by Aspazija, and two by *Bolesław Prus*. Italian literature was represented by five titles, Hungarian by five, Spanish by four, Romanian by three, Bulgarian by two, as well as works from Japanese, Arabic and Chinese (Note 39). Thus, we can see that the range of works translated in the pre-war decade significantly expanded the cultural horizons.

RELIGIOUS BOOKS

A large number of religious books were published in this period: translations, adaptations, books for congregations, explanations of the Bible, introductions to other non-Christian religions and several catechisms. The Bible and the New Testament were published regularly. Many books were written and translated by the Baptist activist and publisher Pēteris Lauberts. Charles Sheldon's book, for example, was published twice (Note 40). Even greater was the activity of another Baptist publisher, Jānis Freijs, who himself translated most of the numerous books he published, though it is not stated in the translations. His wife Ludmilla also translated and is usually named. The precise number of books published is uncertain as many were reprinted, but we can be sure of around 300 and more (the Baptist historian Tervits mentions 850 (Tervits, 1999: 81)). There were several collections of Bible stories for children.

Latvia learnt of more exotic trends and religions when Buddhist teachings appeared in Riga at the beginning of the century (Note 41) (Kuzāne, 1980: 202). Magazines published articles about Oriental religions. In 1902, *Dienas Lapa* (23.12.1902) reported that Olcott's teaching in Germany had reached 35 editions, a brief outline was provided. In 1908 Olcott's *Buddhist Catechism* was published in Latvian, translated by the Latvian writer Deglavs (Note 42), who was not particularly interested in religions: either the book seemed interesting to him or he was in dire need of money (he was writing his voluminous book *Riga* at the time).

With censorship easing, other denominations such as the Seventh Day Adventists were also publishing more. The religious newspapers *Avots* (1905–15) and *Kristīgs Vēstnesis* (1906–14) started operating, publishing many translated texts.

MARXIST LITERATURE IN TRANSLATION

Marxist literature was published in Latvia and abroad. The Latvian Marxist printers moved to London in 1901 and to Berne in 1903. Marxist ideas were given voice in the magazine *Auseklis* in the USA (1898–1901). After the revolution,

ensorship relaxed, and several Marxist texts were published in Riga (Note 43). It is noteworthy that the social-democratic trend dominated in translated literature. Not a single work of Lenin was published, Marx and Engels have only three titles between them (Note 44), but Kautsky around 20 (published in Brussels, Berne, England and St Petersburg, but most often in Riga). The French Marxist Paul Lafargue scored around 10 translations, including parallel ones (Note 45). These were usually translated from German adaptations.

SCIENCE AND REFERENCE TRANSLATIONS

There are many translations on practical economics and agriculture (Note 46), as well as adapted translations, often based on Scandinavian texts (Note 47). The ever-broadening fields of information and language demanded reference literature and terminology development. This led first of all to encyclopaedias, which are naturally based on translating information from other encyclopaedias and texts. Thus, Encyclopedia (*Konversācijas vārdnīca*) was started in 1903/4. Ninety instalments were published, but the war interfered with the final ones, and it was finished by RLB DGN when the 99th instalment was published in 1921. There was the idea of printing it in the new spelling, but that has yet to be done. Scientific literature mostly focused either on general issues (Note 48) or academic literature. Many were adapted or derived works (Note 49). Among the most important were Darwin's *On the Origin of Species* (Note 50) and books on chemistry, philosophy, law, politics, geography and art (Note 51). Many of these were published by RLB DGN, which was acutely aware of the need to cultivate science in order to educate and to apply Latvian to a wider range of domains.

POPULAR SCIENCE TRANSLATION

Newspapers and magazines abounded in popular science translations on various topics, but there were plenty of books as well. Numerous works were dedicated to women's position in society (Note 52), emancipation, marriage and sex lives (Note 53). Pāvils Strautzelis, a doctor, published many books on medicine, some were translations from German and Russian, other adaptations of German texts.

With the beginning of the First World War (1914) there was a sharp drop in publishing: 285 titles in 1914 and only 62 in 1915. As the front approached Riga, printing shops closed or were evacuated, and after the Germans captured Riga publishing virtually stopped. In the early months of the war, it was mainly aggressive propaganda booklets with expressive titles that were printed. Occasionally it was not stated that the booklet was a translation or the translator's name was omitted (Note 54).

TRANSLATORS

Many translators of this period were also prominent Latvian writers and poets: Blaumanis, Deglavs, Apsīšu Jēkabs, Anna Brigadere, Jēkabs Janševskis, Birznieks-Upītis, Bārda, Plūdons, Jaunsudrabiņš, Andrievs Niedra, Akuraters, Kārlis Skalbe, Rainis, Aspazija, Zeltmatis, Ezeriņš. Translation enabled them to earn their daily bread while honing their skills and often establishing their genre and style. Rainis frequently referred to translations he did in order to earn some money. Jaunsudrabiņš also stated,

I must note that I have more often than not earned my daily bread by translations. By and large I chose what to translate, but occasionally some were commissioned. I consider it a more honourable way of earning money than going churning out pot-boilers. Every work has to mature to some extent and, if it is pulled into daylight too early, it has shortcomings and redundancies. (Jaunsudrabiņš, 1957: 96)

Frequently the publishers were also translators, thus the brilliant lexicographer and publisher Dravnieks translated German, Russian, Italian, English and Norwegian writings (Labrence, 1984), Jesens translated numerous works, usually not mentioning the translator, at other times using the pseudonyms Rutks, Rūķis and Birzgalietis. The publisher Arturs Bērziņš translated seven plays and three novels. Similarly, Pīpiņš-Vizulis was both translating and publishing. The long-established publisher Alunāns was still translating pulp fiction at the turn of the century.

As stated above, many translators from the late 19th century were still productive in the run-up to the war. Most of them were good or excellent Latvian writers as well. Lapas Mārtiņš (pseudonym Rujeniets) was very productive, mainly translating trivial novels from German, especially in the newspaper *Baltijas Vēstnesis*, but he also specialised in Estonian literature and later also Scandinavian writing. Paegļu Mārtiņš (Atrimps) was similarly productive, translating Verne, Sienkiewicz, Pushkin, Scott, Gorky and Tolstoy. He often stuck to the now obsolete free method of translation (Note 55). The Latvian poet Plūdons translated Nietzsche's *Thus Spoke Zarathustra* that saw several editions (Note 56), but also plays and a lot of poetry. Jēkabsons started an active translation career at the very end of the century, with works of Whitman, Tolstoy, Lermontov, Molière, Ibsen, Maeterlinck, Krilov, a. o. Birznieks-Upītis had numerous translations, often unidentified as such, especially in Jesens's editions (Egle, 1972: 156-157). Jaunsudrabiņš had several translations in periodicals, many again not identified, but also four in book form. Akuraters had high quality translations of Wilde (Note 57), Ibsen and Maeterlinck. Lejas-Krūmiņš had already established himself in the 19th century as a sophisticated expert in foreign literature and produced a wide range of high-quality translations in periodicals and book form (see above), similar to the writer Treimanis-Zvārgulis (Zvārguļa Edvards). Upītis started his translator's career in this period and greatly expanded it after the war.

Among the very productive translators who are not known as great Latvian writers we should mention Mārcis Zīraks (with a feminine pseudonym Ziemciešu Marija (Gudriķe, 2004)) who produced more than 100 translations, mostly in periodicals, but only 3 in book form. His translations are well done, and he was also considered a most careful editor and outstanding proofreader. Diženajo Bernhards was very productive, among his translations there were voluminous amounts of pulp literature (Note 58), but also works by Ibsen, Conan Doyle, Emerson and Heine, and literature of Ancient Greece and Rome (Note 59). The translations were mostly done via German and Russian. Straume was extremely productive at various kinds of translation, as was Eduards Rudzītis/Rudzīts. At the end of the period Roberts Kroders started translating Russian and English literature. He was to become one of the most productive professional translators in the post-war period.

A new development was the influx of women into translation, something that had not occurred before. Most of the women translators were wives or partners of Latvian writers and usually the two started translating together (Note 60). Prominent examples are Late Veibele, Angelika Gailit (wife of the writer Haralds Eldgasts), Marija Emilija Kalniņa (Stalbova) (wife of the writer Viktors Eglītis), Luīze Skujeniece (wife of the writer Vensku Edvarts), Anna Jansone (wife of the writer Jānis Jansons-Brauns), Anna Rūmane-Ķeniņa (wife of the writer Atis Ķeniņš), Biruta Skujeniece, Elza Stērste (Naurēnu Elza) (wife of the writer Edvarts Virza), Klāra Kalniņa (wife of the politician and author Pauls Kalniņš), Ludmila Freija (wife of Jānis Freijs), Lilija Lejas-Krūmiņa (wife of the translator Eduards Lejas-Krūmiņš), Lizete Erdmane-Skalbe, the first translator directly from Norwegian (Burima 2002: 341) (wife of the writer Kārlis Skalbe) and Aspazija (wife of Rainis).

Apart from the above there were many new translators, many of whom stayed in the profession also after the First World War: J. Akots, Andrejs Andersons, Apsesdēls, Ernests Arnis, Antons Austrīņš, Augusts Baltpurviņš, Jānis Bankavs, Augusts Barčs, Fricis Bārda, Beisotu Jūlijs, Pēteris Bernards, Frīdrihs Bernevics, Arturs Bērziņš, Jānis Bērziņš-Ziemelis, Kārlis Bērziņš, Pēteris Bērziņš, Andrejs Birkerts, Irma Bresovska, Fricis Būcens, Jānis Buševics, Aleksandrs Būmanis, Zande Brūniņš, Indriķis Cīrulis, Pēteris Cīrulis (Zundu Pēteris), Valdemārs Dambergs, Aleksandrs Dauge, Pauls Dauge, Valts Dāvids, Vilis Dermanis, Kārlis Ducmanis, Rūdolfs Egle, Viktors Eglītis, Haralds Eldgasts, Kārlis Ezerietis, Jānis Ezeriņš, Ludmilla Freija, Aleksandrs Freimanis, Angelika Gailit, Fricis Garais, Jānis Grīns, Jānis Jankavs, Anna Jansone, Edvards Jansons, Fricis Jansons, Jānis Jansons-Brauns, Jēkabs Jansons, Paula Jēgere-(Freimane), Kārlis Kasparsons (Jurmalnieks), Jānis Kārstenis (Šmits), Jānis Kleinbergs, Augusts Kokalis, Kristaps Koškis, Jānis Kovaļevskis, Roberts Kroders, Kārlis Krūza, Kārlis Ķebis-Viesturs, Atis Ķeniņš, Linards Laicens, Pēteris Lauberts, Līgotņu Jēkabs, Roberts Makstis, Juris Mauriņš (Kosa), Fricis Mierkalns, Arveds Mihelsons (Rutku tēvs), Vilis Plūdons, Andrejs Priedkalns, Prinduļu Pauls, Eduards Ramats, Pāvils Rozītis (Ilgvars), Anna Rūmane-(Ķeniņa), Vilis Segliņš, Kārlis Skalbe,

Lizete Skalbe (Erdmane), Pauls Skrābāns, Alfrēds Skroderis, Biruta Skujeniece, Skuju Frīdis (Gotfrīds Milbergs), Jānis Sproģis, Elza Stērste (Naurēnu Elza), Kārlis Štrāls, Voldemārs Teikmanis, Andrejs Upīts, Jānis Vainovskis, Augusts Vārna-Vārtniņš, Vārpuļu Indulis (Vasilis), Edvarts Virza, Edvards Vulfs, Zeltmatis, Alfrēds Ziediņš, Kārlis Zvingevičs a.o.

However, the highest quality translations were by Rainis, occasionally in collaboration with Aspazija, as in the case of *Faust*. Aspazija produced only individual works of classics (Note 61), Rainis produced whole series according to his own plans: Goethe's *Egmont* (*Egmonts*), *Prometheus* (*Prometejs*), *Iphigenia in Tauris* (*Ifigēnija*), Dumas's *the Count of Monte Cristo* (*Grāfs Monte Kristo*), Shakespeare's *Anthony and Cleopatra* (*Antonijs un Kleopatra*) and *King Lear* (*Karalis Lirs*), Pushkin's *Boris Godunov* (*Boriss Godunovs*), Hamerling's *Amor und Psyche* (*Amors un Psiche*), Lessing's *Nathan the Wise* (*Natans gudrais*), Schiller's *William Tell* (*Viljams Tells*), *Mary Stuart* (*Marija Stjuarte*) and *the Robbers* (*Laupitāji*), Hauptmann's *Hannele* (*Hannele*) and *the Sunken Bell* (*Nogramušais zvans*), Ibsen's *the Feast at Solhaug* (*Svētki Solhaugā*), Lermontov's *Demon* (*Dēmons*), Heine's *William Ratcliff* (*Wiljams Ratklīfs*), *Bimini* (*Bimini*), *Clavigo* (*Klavigo*), *the Brother and Sister* (*Brālis un māsa*) *Torquato Tasso* (*Torkvato Taso*) and *the North Sea* (*Ziemeļjūra*), Georg Büchner's *Danton's Death* (*Dantona nāve*), Byron's *Cain* (*Kains*) and Calderón de la Barca's *the Mayor of Zalamea* (*Zalameas tiesnesis*) and numerous separate poetry translations. He also started translating Marx's *Das Kapital*.

THE QUESTION OF QUALITY

The quality of translations varied greatly. Some translations of this period (although containing an occasional odd, strange or old-fashioned word) can be read today as samples of good Latvian (Akuraters, Rainis, Jaunsudrabiņš, Kārlis Skalbe, Plūdons), while others are heavy, and full of German and Russian barbarisms and constructions.

Being the editor of *Universālā bibliotēka*, Rainis paid great attention to the issue of translation quality, he was often critical and frequently refused to publish bad translations. Rainis wrote to Gulbis: 'You have many translators who do not know anything, neither Latvian nor any other skill' (Zanders, 2015: 237). He regularly advised younger translators even on individual words and terms (*Literārais*, 1957: 294).

The quality in periodicals is much lower, and works are frequently cut and abridged to fit the format, or with the idea that some parts are not important. Newspaper editors were so overloaded with work that 'they had no time to read through the manuscripts and edit them. Editors of fiction were happy enough to read the title of the work and the names of the author and the translator. And if the translator was known to them, the translation was passed on to the printers. The proofreader was as lax towards the text and the language as the editor,

in order not to create extra work for the type-setters' (Melnalksnis, 1944: 2). Although translators did not work for free in the new century, Rainis noted that 'translation does not pay' (*Literārais*, 1957: 297).

TRANSLATION METHODS

The beginning of the 20th century spelled the end of the old-style localisation strategy with elements of adaptation. Translations became more precise, more faithful to the original; fidelity was now considered important, translators were not afraid of foreignisation strategy. On the other hand, free translation obtained a new artistically creative meaning. Localisation and adaptation occasionally remained in translations of light and trivial plays, and elements of localisation could be observed in science texts, but this was more a question of adapting the content to the reader's supposed level of competence. Some works were still translated as abridged and free summaries, but this was usually stated (Note 62).

This change of method was a gradual and natural one, without theoretical substantiation. It was also often determined by the goal of translation (even when not stated). Thus, light entertainment literature was often translated in a free manner and abridged, with sophisticated or cultural terms omitted. By contrast, if the goal was to enrich the reader's knowledge and extend the expressive boundaries of Latvian, the issue of language use received more attention. Rainis had an even broader view of the purpose of translation: he was only 22 when musing on the state of Latvian literature, he recognised that only translated literature 'can bring new nourishment, new ideas, and aspirations to avoid uniformity, to make our original literature fresh and spiritually alert' (*Literārais*, 1957: 42). In 1912 he wrote: 'I have to keep translating, not for the sake of money, but to exercise the language. Originals never exercise the skilful use of language as well as translations do' (Rainis, 1986: 436). He also called for a collection of Baltic and Estonian theoretical papers on translation issues as a source of knowledge transfer similar to the way Latvian farmers were copying the Danish farming experience.

TRANSLATION CRITICISM

Translation criticism was abundant, discussions of foreign literary works could be found in most newspapers and magazines. However, attention was mostly focused on the contents of the original: critics reminded readers of the significance of the work and what Latvian readers and writers could learn from it, thus perfectly reflecting the defective stance. As regards the translations themselves critics tended to focus on two aspects: first, there were regular complaints that pulp literature should not be published and second, there were frequent complaints about the quality of Latvian in translations. Serious discussion of translation methods, quality analysis, and comparisons of the original with the translation

were extremely rare. Occasionally there were generalised statements, as when Zeiferts suggested that Goethe's poetry had often been made pedestrian and base in Latvian (Zeiferts, 1904: 1327-1329). Translation criticism usually amounted to a concise positive or negative statement, an example being Rainis's translation of *King Lear*: 'a better translation than this of *King Lear* could hardly be produced' (Zālītis, 1901: 187).

However, occasionally criticism was more extensive, thus Upīts, when commenting on Pāvils Rozītis's translation of Wilde's works, complained: 'not a single thought of Wilde's can be grasped, not a single distinguishing characteristic of Wilde's portrayal of reality can be felt in the translation. The translation is the work of the downright bungler from beginning to end, from the first line to the final full stop, and a disfigurement of the Latvian language' (Upīts 1909: 6). Upīts enumerated the obvious mistakes and then appealed to the publishers, stressing that such translations would be difficult to sell.

Ezeriņš (who himself translated two plays by Wedekind) compared two translations of Wedekind's *Spring Awakening* (*Pavasara atmošanās*), by Paegle and Alfrēds Gruzīt(i)s, in 1908. This was a rare approach, even though parallel translations abounded. His comments were not complimentary: 'Here we see simple ignorance of German and Latvian'. Ezeriņš thought that Gruzītis has a Germanic style of Latvian, while Paegle departed from the original by playing with the style. Both translations had inexplicable deletions. 'Paegle's translations could still be considered satisfactory'. But turning to another drama translation of Wedekind, *Music* (*Mūzika*) published by *Mēnešraksts*, he exclaimed: 'OK, it has no style, so be it! But the translators should know the Latvian language! Cannot we, the readers, demand something slightly more seriously refined?' (Ezeriņš, 1908: 2).

In an article entitled *Ibsen's Plays in Latvian Translation* (1909), Zeltmatis pointed out that Latvians now already had excellent translations of plays by Shakespeare, Schiller, etc. but alongside these there were frequently poor translations of plays. For example, the translation of *Rosmersholm* was 'utterly useless'. Zeltmatis warned theatres not to stage it in this version. He insisted that it was advisable for the translator to know Norwegian, to be able to translate from the original, or 'at least to follow it' (Zeltmatis, 1909). Similarly, he commented that 'several works have been totally mutilated', the translations were useless and without corrections unworkable, the translator Anna Bergmane 'has a poor command of the language from which she translates, and an equally poor command of our own language' (Zeltmatis, 1912: 1027). Similarly, Arturs Bērziņš stated that it was 'mostly amateurs that translated plays' (Bērziņš, 1910: 175).

LANGUAGE ISSUES

As can be seen from the above, there was a huge emphasis on the correct use of language. The turn of the century was a period of intense language modernisation and expansion into new spheres and domains. Taking into account the prolonged

German influence on Latvian, and the total dominance of German as a source and intermediary language in translations, Latvian was indeed rather Germanic and suffered from huge German interference. However, literary Latvian had freed itself from German constructions (Kažoku, 1893: 18) by the beginning of the 20th century and approximated to natural spoken Latvian. A multitude of neologisms, terms, clippings and derivatives had been created.

But the Russification which reigned in schools led to an increased Russian influence in the language of translators, since the new generation had studied in 'Russian schools'. Thus, an expert commented: 'It is strange that the same people who laugh about German weirdness consider Russian weirdness in our texts to be a sign of education. In general, our language is being disfigured from both ends: from the retrograde one, that considers Glück's Bible translation the most elegant example of Latvian beauty, and from the pseudoprogressive one that brings in new forms and words; this pseudoprogressive end of the nation now wants to introduce novelties that totally contradict our language's spirit, that are literal translations from Russian and mutilate our language' (Bračš, 1910).

Russification did indeed affect quality of Latvian both directly (schools and authorities) and indirectly (in the absence of literature and science books people looked for Russian sources). Kārlis Skalbe formulated it as follows: 'they read everything in Russian, thought in Russian and when speaking Latvian scattered Russian phrases [...] transferred concepts directly from Russian newspaper editorials into the columns of progressive Latvian newspapers, the hasty translations were full of Russian language forms and Russian words' (Skalbe, 2002: 231). Describing the situation in the editorial office Melnalksnis wrote, 'in the memories of the family of the old editors this epoch is remembered among older editors as the 'farrowing period' since the Russian verb *otnestis* ('to refer to') was translated as *atnesties* ('to farrow') no less than ten times in 100 lines, the translator being misled by the similarity between the two words. It was only due to the avuncular admonitions of Veismaņū Jānis and caustic remarks by Rūdolfs Blaumanis about the real meaning of 'farrowing' that this malady in translations ceased' (Melnalksnis, 1944: 2).

For most translators, except the literary masters, language quality did not matter much: they strove to get the message across and to do it fast. In contrast, Rainis already wanted to create a new language by 1912, one that would be able to express everything: 'we have to organise and recreate Latvian in such a way as to be able to express lofty thoughts. Otherwise, culture is hampered by insufficiency of language' (Rainis, 1986: 430). 'No nation can obtain a Universal Library while it has not prepared its language for universal literature and while the main writings of universal literature have not been translated' (Rainis, 1985: 410).

This reformative approach of Rainis was not to the liking of the leading linguists of the time, thus Milenbachs was very critical of Rainis's translation of *Faust*, insisting that his use of language was too free and not always normative,

also the tendency to clip was viewed as negative. Rainis responded by condemning the linguists for rigidly sticking to outdated norms and developed a lasting dislike for linguists. Amazingly, the editor of the newspaper, Pēteris Zālīte, who failed to understand who was right in the polemic, turned for judgement to the eminent Baltic German old-school researcher of Latvian, August Bielenstein. He produced a short statement saying that Rainis's language was brilliant, but neither Latvians nor the Latvian language were ready for translations of high literature (Aspazija, 1979: 79).

Years later, Rainis announced triumphantly that he had come out as the winner in this battle:

Yes, my new Latvian was victorious; it has become not only the modern literary language that the writers use, it has also become the official language. My language rejuvenation principles, including clipping, have become the leading principles in recreating and developing Latvian, a process that was necessary when Latvia became a state. (Rainis, 1925: 90)

Terminology commissions have created many new terms using principles that were condemned in the past. The new language is a fact, it has won, the loser is the one who resisted it, and he has lost by all the rules of tragedy. (Rainis, 1925: 90)

Andrievs Niedra, a Latvian writer of the old school, while appreciating many of Rainis's achievements, was somewhat critical of his language. He stated that Rainis departed from the traditional 'peasant's language', being aware that the new age called for a 'faster' language. He also stated that Rainis developed his new language through translations, and to some extent deplored this, as it was allegedly based on German and Russian models (Niedra, 1930).

While linguists today see the point of both sides (Baltiņš, Druvieta, 2015), we do speak of 'pre-Rainis language' (Veidemane, 1999: 77). This, of course, does not mean that Rainis's translations were faultless: there were occasional literal transfers, clumsy and Germanic constructions and inconsistent spellings, all very much dictated by the fact that Rainis often translated works piecemeal and each fragment was published immediately, so he lost sight of the work as a whole (Gudriķe, 1989: 19).

ORTHOGRAPHY ISSUES

There was much controversy as regards Latvian spelling in general and even more in the wake of the orthography reform, very much reflected in translation criticism. The Germanic spelling system was frequently confusing, with one and the same author, title, publisher or name spelled in several different ways. Thus, *Baltijas Vēstnesis* wrote: 'Orthography issues constitute a genuine burden for our linguists and writers: each tends to write in his own orthography' (Iekšzeme, 1898: 1).

In addition, some names would be written in Latin characters in the middle of a Gothic text.

The driver of reform was the Academic Committee of Riga Latvian Society (*RLB Zinību komisija*) (Volfarte, 2009) which had in general paid much attention to language issues by deliberately publishing research and translations in various domains (Blinkena, 1996). By the turn of the century, spelling had been slightly simplified: the use of double consonants curtailed, use of *h* for signifying long vowels also limited. An Orthography Committee was established in 1908 under the aegis of the Academic Committee that included the well-known linguists Kārlis Mīlenbachs, Jānis Endzelīns, etc. It drafted a proposal for new principles of spelling (Kļaviņa, 2008). The new spelling, and Latin script, was accepted by the Society on 18 June 1908. Curiously (or symbolically) the Riga Latvian Society House burned down the next day.

The new orthography became part of school curriculum in 1909. But periodicals and books were slow to accept it: the newspaper *Zemkopis* adopted it only in part, some schoolbooks appeared in a mixed script, like *Latvian Literature*, which carried quotations and text samples in the old orthography (Note 63). Newspaper advertisements and headlines were often printed in the new orthography, but the rest in Gothic with Germanic spelling. The year 1910 saw the first Latin-script Latvian encyclopaedia, in two volumes. The war delayed the transition even more. The newspaper *Latvijas Vēstnesis* adopted the new script in 1920, the newspaper *Rīts* in 1934 and the rest only in 1938. Most pre-war translations stuck with the old script.

CONCLUSIONS

The pre-war period was an epoch of huge advances and expansion in the Latvian translation scene. New, contemporary authors' works became available to Latvian readers. The Latvian readership was consciously being integrated into general European literary trends. Publishing in Latvia 'went through all stages of development in a very short period and at the beginning of the 20th century approached the level of the cultured nations of the world' (Labrence, 1984: 112).

It was also a heyday of periodicals that published numerous translations, including numerous novels. There are countless double translations of the same works, some parallel translations even reaching double digits. Translations included various genres and the traditional Latvian interest in plays was very obvious. So was the focus on agricultural literature. The translation method changed from localisation to a fidelity mode with a tendency to foreignisation. German was gradually losing its dominant positions as a source and intermediate language, Russian was advancing, so was also the scope of other languages. This period also saw a change of generations among translators, and with the new generation women became visible in translation scene. Frequently translations now had prefaces and explanations by the translators.

Translated literature now ranged from serious classical works to modern ones and from pulp literature to high quality creations. Naturally, the quality of translations was also very varied. The expansion of translation and the cultivation of new domains went hand in hand with a preoccupation with the development of the Latvian language itself. The outbreak of the First World War halted this unprecedented growth, but so much had been achieved that a columnist and future Prime Minister Marģers Skujenieks could state in 1913: 'now that articles on most varied scientific fields are being composed in Latvian, now that the classics of the great nations have been translated and an encyclopaedia published, now objections against the language are unfounded and only attest to the objectors' own ignorance of Latvian' (Skujenieks, 1913: 81-82).

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NOTES

- Note 1. *Fausts: traģedija no Ģetes*; tulkojuschi Aspasija un Rainis. Rīga: Ernsts Plates. 1898; *Fausts: pirmā un otrā daļa no Ģetes*: tulkojuschi Aspasija un Rainis. Rīgā: Drukats un apgahdats Ernsta Plates tipo-litografija. 1898.
- Note 2. Grāmatu raskats. *Jaunibas tekas*, 1923, nr. 10 (pp. 317-318).
- Note 3. *Pasaules rakstneeziba: zittautu scholaiku eevehrojamako rakstneeku sazerejumu paraugi stahstos, nowelēs un skicēs: (ar ihsām biografiskām-literariskām peezihmem)* latweescheem pasneedsis Lejas-Kruhmņsch. Rīgā: Orłowska apgahdibā, 1899–1901
- Note 4. *Mājas viesis* 11.08.1910. (pp. 749-753).
- Note 5. *Karsch un meers: romāns*. Ļews Tolstojs. J. D., (wehlak) J. R. Pirmās daļas pirmās diwas nodaļas tulkojis J. Drawneeks, turpinājumu un beigās – mahzitajs J. Ruzelis.
- Note 6. *Johanna Wolfganga fon Ģētes raksti*. J. Raiņa un Aspasijas tulk. Pēterburga: A. Gulbja apgādibā. 7. sēj. 1903.
- Note 7. *Alpu kalnu deewene, jeb, Bez zihniņa naw uswaras*: romantisks stahsts no E. Wener. brihwi tulkojis Abaweetis. Rīga: W. Schneiders. 1901.
- Note 8. *Julijs Zesars. Behdluga peezos zehleenos no Wiljama Schekspira*. Rīgā: RL BZK Derīgu grahmatu apgahd. Nodaļa. 1897.
Wiljama Schekspira Richards III: behdluga 5 zehleenos. Tulkojis Fr. Ad. Rīga: Apgahdajusi Rīgas Latweeschu beedribas Derīgu grahmatu nodaļa. 1902.
- Note 9. *Wiljama Šekspira Karalis Lirs*: traģēdija 5 cēlienos. Tulkojis J. Rainis. Rīga: apg. Rīgas Latviešu Biedribas Derīgu grāmatu nodaļa. 1900.
- Note 10. *Zittautu Rascha*. Sakahrtojais Wisulis. Cēsis: J. Ozols. 1899–1901.
- Note 11. *Modernā Wahzu Lirika*. Pludoņa tulkojumā. Pēterburga. A. Gulbja apgahdibā. 1913.
- Note 12. *Rīgas Avīze* 1911, nr. 2-55.

- Silazite*: Romans iz Ungārijas rewoluzijas laikeem (1848–1849 g.). No Maurus Jokaija. Tulk. M. Birsgaleetis. Ar apgahdataja preekschwahrdū. Rīga J. Misiņa apg. 1911.
- Note 13. *Baudu viesuļos: skati iz franču aristokrātijas dzīves (masāzistes piezīmes)*. A. Berned. Tulkojusi B. Et. Rīgā: M. Akmens. 1910.
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