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Revija ***Dve domovini / Two Homelands*** je osrednja slovenska znanstvena revija, namenjena objavi izvirnih znanstvenih in strokovnih člankov, ki obravnavajo različne vidike migracij. Revijo je leta 1990 ustanovil Inštitut za slovensko izseljenstvo Znanstvenoraziskovalnega centra slovenske akademije znanosti in umetnosti in izhaja dvakrat letno v slovenskem in angleškem jeziku. Vsi članki so dvojno anonimno recenzirani.

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MIGRATIONS AND HISTORICAL DEVELOPMENT PATHS— A COMPARATIVE PROJECT BETWEEN SWITZERLAND AND SLOVENIA: INTRODUCTION TO THE THEMATIC SECTION

Luigi Lorenzetti¹

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Switzerland and Slovenia are characterized by different historical developments that have shaped their urban and industrial development, social characteristics, and identity dynamics. However, they share some geographical similarities: they all encompass mountainous regions, have a widespread integrated peasant economy, and have experienced significant cross-border migration and mobility events. Influenced by the different historical roles of the border, the migration practices that developed between the 18th and the first half of the 20th century had a significant impact on the specificities of the economic and social development of the border areas of the two countries.

Encouraged by these similarities, from 2020 to 2023, we carried out the project Migration and development in the mountain borderlands of Switzerland and Slovenia: a comparative perspective (18th–20th century). The project aimed to reconstruct and analyze, from a comparative and diachronic perspective, the impact of mobility and migration on four territorial realities of Switzerland (the cantons of Neuchâtel and Ticino) and Slovenia (the regions of Goriška and Styria) between the 18th and mid-20th centuries. More precisely, the project investigated how migration and mobility practices favored the emergence of specific economic models and particular development paths in the selected regions with an emphasis on the 19th century. From this perspective, we considered two alternative hypotheses. The first hypothesis assumes that migrants' remittances are the origin of the formation of "rents" based on conservative investments that serve to defend the existing order in the rural family and its cultural environment. The second hypothesis refers to the transnational interpretation of migration and recognizes that migration has contributed to the formation of open economies and "extroverted" models of social development through the input of labor and the development of skills, know-how, and social relations.

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Based on these hypotheses, the project considers the interactions between national and local development contexts on the one hand and the population's propensity to migrate on the other, which can increase when the aspiration for better living conditions grows faster than local livelihood opportunities. Migration processes can, therefore, influence the local development context through their impact on labor supply, consumption, investment, inequality, social stratification, local culture, and aspirations. To test these assumptions, the project is divided into three research themes.

- The first theme analyzes migration as a phenomenon that involves flows of goods, financial resources, ideas, and relationships that reflect their characteristics and destinations.
- The second theme looks at the economic and social inequalities created by migration in the regions of origin and arrival.
- The third theme examines how and to what extent borders influence migration income and mobility in the areas under consideration.

The project was carried out by one Swiss and three Slovenian research institutions: the Laboratorio di Storia delle Alpi (www.labisalp.arc.usi.ch), the Institute of Contemporary History (<https://www.inz.si/en>), the Slovenian Migration Institute of the Research Centre of the Slovenian Academy of Sciences and Arts (<https://isim.zrc-sazu.si/en#v>), and the Department of History of the Faculty of Humanities at the University of Primorska (<https://fhs.upr.si/en/departments/departments-of-history>). In this thematic block, we present partial results of the extensive research work.

The contributions shed light on the influence of various emigration forms on the logic of migrants' remittances and how these can also take on an entrepreneurial character. At the same time, they emphasize the role of religious institutions in implementing altruistic and redistributive practices by migrants embedded in strategies of family reproduction, as well as the impulses of emigration in the colonial world for the benefit of the economic and cultural development of the regions of emigration.

THE ECONOMIC AND SOCIAL IMPACTS OF COLONIAL EMIGRATION ON NEUCHÂTEL DURING THE “LONG 19TH CENTURY”

Fabio Rossinelli,^I Ricardo Borrmann^{II}

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ABSTRACT

The Economic and Social Impacts of Colonial Emigration on Neuchâtel During the “Long 19th Century”

The Swiss Canton of Neuchâtel was able to develop and become one of the country's economic poles—particularly in the export of watches—thanks to the movement of emigrants to Europe and European immigrants to Switzerland. At the same time, missionaries, explorers, and businessmen left Neuchâtel to travel to the colonial world. Historiography has never linked these two migratory phenomena. This article aims to fill this gap. On the one side, it will provide an overview of the existing historiography. On the other, through some case studies, it will propose evidence and new research approaches. The result will be an invitation to de-Europeanize the history of Neuchâtel in order to inscribe it into the global history of the colonial era.

KEYWORDS: colonial migration, colonial trade, economic development, economic and family networks, de-Europeanization

IZVLEČEK

Gospodarske in družbene posledice kolonialnega izseljevanja na kanton Neuchâtel skozi »dolgo 19. stoletje«

Švicarski kanton Neuchâtel se je lahko razvil in postal eno od gospodarskih središč države – zlasti na področju izvoza ur – zahvaljujoč izseljevanju v Evropo in priseljevanju Evropejcev v Švico. Hkrati so iz Neuchâtla na potovanja v kolonialne države odhajali misijonarji, raziskovalci in poslovneži. Teh dveh migracijskih pojavov zgodovinarji do sedaj niso nikoli povezovali, namen tega prispevka pa je zapolniti to vrzel. Avtorja na eni strani podajata pregled obstoječega zgodovinopisja na to temo, na drugi strani pa s pomočjo nekaterih študij primerov predstavita podatke in predlagata nove raziskovalne pristope. Na podlagi navedenega pozivata k deevropeizaciji zgodovine tega kantona ter k njegovi vključitvi globalno zgodovino kolonialnega obdobja.

KLJUČNE BESEDE: kolonialne migracije, kolonialna trgovina, gospodarski razvoj, gospodarske in družinske mreže, deevropeizacija

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INTRODUCTION

Neuchâtel, a francophone canton in Western Switzerland, encompasses a part of the Jura Mountains and shares its northern border with France. The French Empire ruled the region from 1805 to 1814 at the time of Napoleon I. From 1707 until 1805, however, Neuchâtel was a Prussian principality, as it was again from 1814 until the 1848 republican revolution, which marked its ultimate adhesion to the newly formed Swiss Confederation (Jelmini et al., 1991; Jucker et al., 1993). This simple look at Neuchâtel's geopolitical history allows us to see a strongly transnational trajectory. Although the construction of modern Switzerland has only recently been told from a European perspective (Humair, 2009; Holenstein, 2014), Neuchâtel's connections with Europe have been evident for a centuries. Numerous studies on migration covering the 18th to the 20th centuries show how immigrants from the Swiss regions and other European countries contributed to the development of the canton and its municipalities. Less attention, however, has been given to colonial experiences. Although in the last 20 years, new literature has emphasized how Switzerland practiced "colonialism without colonies," the focus has mainly been on what the Swiss did overseas or on the ideological legacies, such as racism, of this experience (Purtschert & Fischer-Tiné, 2015). However, Swiss migration history has given little attention to the economic and social impacts of colonialism in the country (Holenstein et al., 2018).

In Neuchâtel, we find the same problem. Migration historians have mostly been interested in border migration, migration between one canton and another, or migration to neighboring countries when talking about the development of Neuchâtel—while migrants in the colonial world, such as slavers and missionaries, are little analyzed from this perspective. So, in the first part of this article, we trace the broad outlines of what we call a "double historiography" of Neuchâtel's migration history, underlining what we consider as its interpretative limits and proposing new research focuses. In the second and third parts, we analyze the empirical findings of our study into Neuchâtel's global interconnections during the "Long 19th Century," focusing on this canton's colonial imbrications with Latin America and Southern Africa. We will thus show how Neuchâtel, geographically distant from the sea and apparently absent from overseas, shaped and was shaped in its economic and social developments through strong relations with colonialism—the latter defined as a multifaceted phenomenon of exploitation of other peoples and cultures, which can generate lasting repercussions on all those involved (Osterhammel & Jansen, 2021).

NEUCHÂTEL, MIGRATION, AND DEVELOPMENT: FROM A SWISS AND EUROPEAN HISTORY TO A COLONIAL AND GLOBAL HISTORY

We recognize two main historiographical strands that approach the topic of migration in Neuchâtel in the modern era. The first focuses on short-range (interregional, cross-border) and medium-range (continental) migration. This literature primarily emphasizes the movement and settlement (temporary or lasting) of migrants but also addresses the question of how their presence changed the demographic structure of the republican canton, which joined the Swiss Confederation in 1848, and how this contributed to the material development of the territory and its economic activities.

Several historians have used quantitative analytical methods to study the historical demography of Neuchâtel, emphasizing the extroversion and migratory dynamism that began to characterize the region in the 17th century (Cop, 1989; Christ, 1991; Froidevaux, 1999). Between 1750 and 1850, Neuchâtel's overall population increased from 32,000 to 68,000 inhabitants thanks to numerous arrivals from Berne and other regions, as well as from other European countries. In contrast to the demographic increase, the proportion of citizens born in Neuchâtel dropped from 87% to 64% during this same period (Henry, 2011, pp. 102–108). In the Jura highlands, the migration phenomenon was even more pronounced than in the lake areas, probably due to the seasonal and cross-border migrations that marked economic life in the mountains (Daveau, 1959, pp. 186–204, 504–518; Cop, 1993). It was precisely in these mountainous locations that the Swiss watchmaking industry arose thanks to the contribution of a workforce more and more composed of immigrants, starting with the Huguenots who settled in Geneva from France and then emigrated to Neuchâtel.

After revoking the Edict of Nantes in 1685, numerous Huguenot refugees settled in Neuchâtel. Among them were merchants, manufacturers, printers, dyers, and highly skilled artisans already active not only in the watchmaking techniques but also in the so-called *Indienne* trade. As a result, Neuchâtel became one of the European hubs for both the watchmaking traditions and trading of these highly valued printed cotton fabrics (*Indiennes*). This business required significant capital and was closely tied to the trade in colonial goods, cotton, and slavery. This endeavor was not only about the transfer of technical knowledge and craftsmanship. These developments were also shaped by significant capital flows, particularly directed toward Geneva and Neuchâtel. At the end of the 17th and the beginning of the 18th century, Huguenots established *Indienne* manufactories along the borders of the French kingdom.

The case of La Chaux-de-Fonds, a UNESCO World Heritage Site since 2009 for watchmaking urbanism, is emblematic. With a population of around 2,500 people in 1750, 90% of whom were locally born citizens in Neuchâtel, the emerging watchmaking center exceeded 12,000 in 1850, then 36,000 in 1900, half and even more

of whom were not originally from Neuchâtel: France, Germany, and Italy were key countries of origin for migration to La Chaux-de-Fonds (Cop, 1981, p. 121; Barrelet, 1985, p. 42). The Italian community, for example, contributed greatly to the building of La Chaux-de-Fonds to its social, cultural, and political life—including workers' union protests (Perrenoud, 1985; Zosso & Marsico, 2002). So, labor force immigration contributed to the economic development of Neuchâtel's watchmaking industry over the long term (Garufo, 2015).

In his first volume of *Das Kapital*, from 1867, Karl Marx wrote that La Chaux-de-Fonds could be considered "a huge watch factory" (Marx, 1976, p. 462). Watchmaking also developed in the nearby town of Le Locle and, more generally, in Western Switzerland until it became the second most exported production of the country (behind textiles from Eastern Switzerland). Worldwide watch production was 70% in Swiss hands in 1870 and 90% in 1900 (Donzé, 2009, pp. 33–38). Although the main absorbing markets were the European countries, with important breakthroughs into the North American market, the watch trade also expanded elsewhere, such as Brazil and Japan, accompanied by specific entrepreneurial emigration (Veyrasat, 1986; Donzé, 2006). The mode of watch production, however, remained for a long time anchored to the so-called *établissage* (Blanchard, 2011)—an artisanal and decentralized method in which individual pieces were manufactured separately, then assembled in specific ateliers and finally sold through specialized circuits and dealers. All this required a constant presence abroad, with an extensive network of exchanges, apprenticeships, and contacts in a metropolis such as London and Paris. It was a sort of migratory universe in itself (Donzé, 2020, pp. 17–35).

Although one could argue that emigration related to watchmaking was a unique reality, it was not the only form of reason for migration flows from Neuchâtel and the Jura Mountains. Many people went to the borders of Europe or outside the continent for other reasons, necessities or opportunities. Here, we enter the second historiographical strand, which analyses long-range migration flows.

Emigration to faraway countries during the 19th century was, in many cases, motivated by sectoral economic crises (for instance, during the Great Depression) or by precarious life and working conditions, especially in rural areas (Arlettaz, 1975; Widmer, 1992). Similar to the Alpine regions in Ticino and Valais, the Jura Mountains also experienced mass migration movements abroad—to Australia under British rule, to the French colonies in North Africa and to the pre- and post-independence Americas (Cheda, 1976; Henry, 1989; Maye, 1997; Lovis, 2020). The social status of women from modest backgrounds and the lack of perspectives in Neuchâtel and the rest of Switzerland encouraged emigration, especially to the East, where they worked as governesses, carers and instructors, for instance, in the Russian Empire (Maeder, 1993), but also other parts the world. This is the case of the teacher and traveler Lina Bögli (1858–1941), who experienced her social ascension through a ten-year round-the-world journey in which she stayed for some time in various countries under colonial rule to teach in local schools or institutions (Fussinger,

1995). However, this example of female migration was not the only case: Wealthy patrician families from Neuchâtel, as was the case of the sisters Olympe Esther de Pury (1796–1857) and Charlotte Julie de Pury (1800–1862), were sent to the Dutch Empire to gain teaching experience before returning home (Rossinelli, 2023a, p. 97). Furthermore, it was precisely the rich people of Neuchâtel, such as the de Meuron and de Pourtalès families, who emigrated overseas for longer or shorter periods pursuing business activities tightly intertwined and directly profited from enslaved labor and colonial societies. As we would like to demonstrate here, this aspect has been somewhat (and too often) downplayed by the existing literature (Bergeron, 1970; De Meuron-Landolt, 1999; Galofaro, 2024). Others emigrated with different ambitions, pursuing a career in scientific research as colonial mercenaries or even as Christian missionaries (Henry, 2006).

Apart from analyzing a small number of cases, we diagnose two other problems regarding this second historiographical strand: 1) Only recently has it begun to approach the global history of this long-range migration from Neuchâtel in the 19th century as a result of a violent imperial expansion, of which Switzerland, although without official colonies, was an intrinsic part (Rossinelli et al., 2024). 2) Only a few studies have tried to measure how these migrations to overseas destinations, for example, of colonial mercenaries or business families, changed the history of the migrants' places of origin by questioning the foundation of institutions such as museums and the acquisition of scientific and artistic collections (Kaehr, 2000; Glauser, 2005).¹ In contrast to this tendency, the first historiographical strand accords much importance to the effects of migration on Neuchâtel—be they demographic, economic, or urban—and thus seems to subscribe, at least implicitly, to long-standing theories describing the relationship between migration and development (Monsutti, 2008; De Haas, 2010). However, this literature focuses on short-range and medium-range migration and, in so doing, tacitly excludes that Neuchâtel's material development is extremely entangled with global and colonial migration processes.

We aim to absorb the contributions of these two historiographical strands we have analyzed. We draw inspiration from the pioneer studies of historian Béatrice Veyrassat (1993; 2014) because she links the local or regional realities with the national, European, and global dimensions—and in which the private sphere, such as the presence of people and interests from Neuchâtel or Switzerland somewhere in the world, motivated the action of the public sphere. It was precisely in these

1 This issue has mostly been addressed, and only in recent years, by public institutions in Neuchâtel, which, in collaboration with scholars, have proposed initiatives such as a guided tour through the streets of the city aimed at illustrating the material traces of urbanization linked to slavery and colonialism—including the two main centers of medical and psychiatric care, the Hospital de Pourtalès and Préfargier. This project, piloted by Prof. Matthieu Gillabert (University of Fribourg) and active since 2023, is entitled *Neuchâtel – Empreintes coloniales*. See <https://www.neuchatelville.ch/sortir-et-decouvrir/visiter-neuchatel/empreintes-coloniales> (accessed 28 November 2024).

studies, to which little follow-up has been given, that Veyrassat (2014) attempted to establish a connection between short-, medium- and long-range migration to material effects on the country produced by overseas emigrants to previously little-known connections between the very closed circuit of watchmakers and the broader colonial markets. On the one hand, much information can indeed be found in the existing literature to reconstruct a common migration history of Neuchâtel in the period between the end of the *Ancien Régime* and the beginning of World War I—the “Long 19th Century,” according to historian Eric Hobsbawm. On the other hand, it is equally valid that new research in little-explored archives makes it possible to show how the imbrications between migration processes and colonial experiences directly impacted the local and regional history of Neuchâtel.

MIGRATORY RELATIONS BETWEEN NEUCHÂTEL, BRAZIL, AND THE SLAVE ECONOMY (LATE 18TH CENTURY TO MID-19TH CENTURY)²

A family history of union, migration, and business: The transfer of Brazilian fortunes (and debts) to Neuchâtel

Before the new literature on the Swiss involvement in slavery and colonialism was published (David et al., 2005; Fässler, 2005), Switzerland’s migration links with the colonial realities were often described as the image of a nation of hardworking, impoverished farmers—particularly from Catholic cantons like Fribourg—who moved to the Americas to work on plantations, often alongside or even in place of enslaved people (Nicoulin, 1973; Ziegler, 1985). The case of Neuchâtel, according to the mentioned new literature, provides a contrasting perspective. It reveals the migration of wealthy bourgeois families to trading metropolises and colonies, illustrating Switzerland’s active economic relations with colonial societies. Some central aspects emerge in Neuchâtel’s case: family-based trading networks rooted in Protestant solidarity and closely intertwined with the financial system. As historian Christoph Dejung (2024, p. 762) observes: “The advantage of family firms lay in the fact that they were associated with a particular group of people, which ensured continuity in trading relationships. What is more, marriages were used either to establish or to stabilize business ties between different merchant houses. This was a regular practice among European and North American merchants well into the nineteenth century.”

The Borel and the de Meuron families are paradigmatic examples of this practice, as highlighted by Dejung (2024), and the economic elite migration to the Americas (Wasserfallen, 1999). As we will see below, in the first half of the 19th century, they

2 This case study, by Ricardo Borrman, is part of the ongoing SNSF-funded project no. 215068 (2023–2027): “Neuchâtel face à la colonisation: circulations, intrications et mémoire”, University of Neuchâtel.

established a sort of private empire in Brazil, exemplifying the connections between family ties, Protestant sociability and commercial networks, large-scale finances, and the colonial world. Additionally, the Borel family's money flows contributed significantly to the changing landscape in Neuchâtel through donations and constructions. Here, the establishment of the Préfargier Hospital stands out because it literally transformed the medical landscape of Neuchâtel during the 19th century (De Meuron-Landolt, 1999).

In this part, we will retrace the paths of the Borel and de Meuron families, which have not yet been extensively studied in the history of economic elite migration. We will explore the ties binding Neuchâtel's bourgeois families to colonial markets, especially Brazil. On a macro scale, this analysis highlights how this case provides heuristic insights into migration history, particularly concerning the intertwining between family connections and commercial ties. Many families examined here also had their direct representatives in the Grand Council of the City of Neuchâtel (Grand Conseil), the most important political decision-making authority in Neuchâtel.

One noteworthy archival record from the State Archive of Neuchâtel references Louis-César-Alexis Borel. According to baptism records from 1842–1854 (*Livre de Baptêmes*), Borel, residing at the Colonie Léopoldine in Bahia, Brazil, baptized his daughter Louise in Villa-Viçosa on March 20, 1843. The document states that Louise was born on February 28, 1842, in the Colonie Léopoldine. This record provides an entry point to trace the Borels' presence in Brazil.³ Louis-César-Alexis Borel married François Marie and was the father of Charles-Louis Borel (1776–1852). Another interesting record is of one of his brothers, Edouard G. Borel, described as the factory director, "Ed. Borel in Rio de Janeiro."⁴

Antoine Borel (1791–1857) was originally from Neuchâtel, and in 1754, he entered the colonial goods trade in Neuchâtel. He completed his apprenticeship in Basel and then in Paris with the Swiss merchant bankers "Meuron & Coulon" (Galofaro, 2024, p. 260). Antoine Borel then traveled to the United States and Canada from 1816 to 1819 to manage a company involved in cotton purchasing in partnership with Louis de Meuron and other associates from Paris. He then traveled to Cuba and to Brazil in 1819, where he encountered the slave trade and slavery. Later, he partnered in Le Havre with Édouard Borel, the husband of Auguste de Meuron's sister from Bahia. Maurice Borel (1783–1860), Antoine's father, established himself as a merchant and judge in Neuchâtel, working alongside his younger brother Laurent (1797–1861) to distribute goods received from Le Havre in Switzerland. Antoine Borel acquired the mill in Bevaix near Neuchâtel in 1841 and retained it until 1844. This account highlights the Borel family's business activities and the evolution of its capital, which influenced changes in the corporate structures at Borel Frères (Borel Brothers).

3 Archives d'Etat de Neuchâtel (AEN), file "NEUCHÂTELOIS A L'ETRANGER (2) 172", subdivision "BAHIA", document "Louis-César-Alexis Borel".

4 Archives d'Etat de Neuchâtel (AEN), file "NEUCHÂTELOIS A L'ETRANGER (2) 172", subdivision "BAHIA", document "Edouard G. Borel".

In July 1818, Antoine Borel received news of the death of one of his brothers, first from Auguste-Frédéric de Meuron, then from his (and his other brother's) friend and future partner Charles-Édouard Borel, from Le Havre. By August of the same year, Antoine had returned from Montréal to New York, where he received updates from his expatriated friend from Neuchâtel, also called Meuron de Bahia ("from Bahia"), precisely because of his flourishing businesses in the Brazilian Northeastern Province. In the letter, Meuron de Bahia reflected on the death of Antoine's brother Louis and expressed surprise at the upcoming marriage of Antoine's friend, Édouard Borel, to Meuron de Bahia's sister, Henriette-Frédérique de Meuron (Wasserfallen, 1999, p. 104). The sources we consulted are unclear as to whether Édouard G. Borel is the same individual as Charles-Édouard Borel (1790–1855), who married Henriette-Frédérique de Meuron (1794–1876), or whether the "Ed. Borel in Rio de Janeiro" is connected to the original company founded by Antoine and Eduard Borel in Le Havre in 1820 (Galofaro, 2024, p. 261). They likely belong to the same direct lineage, but our current archival research does not allow us to confirm these connections. According to secondary literature, Frédéric-Édouard (1825–1904), one of the seven children of Charles-Édouard Borel and Henriette de Meuron, served as the factory designer in Salvador da Bahia and Rio de Janeiro (Galofaro, 2024, p. 261). He was most likely the one who further expanded the company's business in Brazil. However, additional research is needed to confirm these connections.

Auguste-Frédéric de Meuron married a member of the de Pury family, founded Meuron & Cie in Brazil in the 1830s and his legacy, as we said, financed the Préfagier Hospital in Neuchâtel. Édouard Borel, in his turn, worked for eight years with his Parisian relatives, the Meurons, who married later Auguste-Frédéric's sister Henriette-Frédérique de Meuron, intertwining the two already interconnected families' capitals inextricably. As Wasserfallen (1999, p. 104) states: "The couple Édouard and Henriette-Frédérique Borel-De Meuron inherited the remaining portion of the Meuron estate in Bahia [...] which included the Château de Dully (where we will see Édouard's widow residing in the 1850s–1860s)."⁵

This inheritance included the estates founded by Meuron in Brazil, enduring until the 20th century (Wasserfallen, 1999, p. 167). Édouard and Henriette-Frédérique's marriage solidified a business empire, generating substantial revenue from South American imports, such as coffee, tobacco, and dyes. Antoine Borel's initial 5,000-franc loan from Ballif-Hunziker of Bern enabled his partnership with his friend Édouard, whom he met through Meuron de Bahia, culminating in a 100,000-franc contribution by 1833 (Wasserfallen, 1999, p. 43). This inheritance and loan underscores Borel's family's fortune and deep connections to Brazil.

Auguste-Frédéric de Meuron's influence was foundational. Galofaro (2024) states he had the biggest fortune in South America, and Wasserfallen (1999, p. 43) highlights that his endeavors were "a strategic alliance based on the bonds

5 Translation from the original French by the authors.

of trust essential for the successful development of business.” In 1816, Meuron de Bahia partnered with David-Henri de Meuron in Lisbon to establish a trading post in Bahia. Although initially unprofitable, these associations laid the foundations for Meuron’s future commercial success in Brazil (De Meuron, 1991; De Meuron-Landolt, 1998, p. 200). By 1819, he had established independent enterprises in Salvador da Bahia, expanding with subsidiaries in Rio de Janeiro (1832) and Pernambuco (1836) (De Meuron-Landolt, 1998, p. 199). Brazil’s economy at the time relied heavily on enslaved labor, a fact central to understanding Meuron’s profitable enterprises and, indirectly, the Borels’ growth in capital and wealth later. Meuron’s background is crucial to understanding the funds that flowed later to the Borel’s enterprises. Henriette Frédérique Meuron-Borel formed a general partnership with her son, Édouard Borel, to manage the manufacturing operations in Bahia, Pernambuco, and any potential rights in the Rio branch. Established in 1856, this company operated until 1886 under the name Borel & Cie, successor to Meuron & Cie (1892, 1896–1913) (Galofaro, 2024, p. 135).

Further documents from the “Pierre-Abram Borel funds” in the State Archive of Neuchâtel shed light on another of the Borel branch family’s commercial operations. The “Transfer of the plantation in Léopoldine” details the passing of a plantation from Charles-Louis Borel (1776–1852) to his sons, accompanied by an inventory of enslaved laborers.⁶ Léopoldine is a Swiss German colony founded in 1818 in Brazil’s province of Bahia (Galofaro, 2024, p. 149) and was formed by three big plantations called Riacho d’Ouro, Pombal, and Helvécia (Galofaro, 2024, p. 153). Pombal is one of the properties owned by Charles-Louis Borel and passed over to his two older sons in 1827:

We, the undersigned Charles Louis Borrel, father, residing in Colombier near Neuchâtel in Switzerland, and his two eldest sons, Eugène and Gustave, agree to the following:

Borrel, father, transfers to his two aforementioned sons all the assets, or property, consisting of land, mechanical buildings, enslaved persons, livestock, furniture, fabrics, and provisions owed to the said Mr. Borrel, father, in the balance sheets of the years 1826 and 1827, closed on November 30, 1827, by the former company Borrel, Béquin & Huguenin in Pombal, Brazil.

This transfer takes place at the same valuations at which these various items appear in the books of Borrel, Béquin, and Huguenin. Eugène and Gustave Borrel will become jointly and severally accountable and indebted by a promissory note, with

6 AEN, file “BOREL PIERRE-ABRAM-15,” document from 30 November 1827 signed by Eugène Borrel, Gustave Borrel and Charles Louis Borrel. In the original documents we used, their last name appears with a double “r,” so we have maintained the original spelling here.

interest at five percent per annum, for the amount of this transfer, in favor of Borrel, father, as of November 30, 1827.

The land, crops, leisure facilities, tools, and buildings of the plantation will serve as collateral for Borrel, father, until full repayment of his claim. Eugène and Gustave Borrel will have twelve years, that is, until December 31, 1839, to repay the capital in the manner they deem most suitable to their father's interests, whether through deferred payment orders at the price of Bahia or Rio sent to Switzerland, or based on the advice they obtain from informed merchants regarding the most advantageous repayment method for Borrel, father.⁷

Another document of the same file, "Acknowledgment of debt by Alexis Borrel," outlines debts totaling 900,000 reis, a significant sum tied to their colonial ventures.⁸ These records unravel just a small part of the financial and social-familial networks linking Neuchâtel's bourgeoisie with the colonial economy. Charles-Louis Borel (1776–1852) was originally from Colombier and decided to establish himself in Brazil after considerable financial losses during the years 1813–1817, as Veyrassat (1993, pp. 134–135), citing sources from the State Archives of Neuchâtel, shows:

My successive losses in 1813, 1814, and 1815, and my disasters in 1816 and 1817 have not only consumed the savings of an entire previous lease but have also left me in debt with eight children, unraised – our sons and four daughters [...] On the other hand, in Brazil, a path is opening up for the Swiss who wish to dedicate themselves to clearing land and cultivating cotton, sugar, and coffee, and His Majesty the King of Brazil [...] will favor and protect the Swiss there, granting them land to clear.⁹

With the support of Meuron & Cie, Charles-Louis Borel managed to acquire his lands in the district of Porto Seguro (the property he would name Pombal) (Galofaro, 2024, pp. 150–151). He entrusted two partners, Pierre-Henri Moulin from Colombier and Philippe Huguenin, along with his 15-year-old son Eugène, were tasked with establishing an agricultural settlement (focused on coffee) in the district in 1819. Charles-Louis Borel's other sons, Gustave Adolphe (born 1808) and Charles-Henri Borel, would join the enterprise in 1823 (Galofaro, 2024, p. 151). Borrel, the father, visited them between 1826 and 1828. In 1829, it seems he purchased enslaved

7 AEN, file "BOREL PIERRE-ABRAM-15," document from 30 November 1827 signed by Eugène Borrel, Gustave Borrel and Charles Louis Borrel. All the archival manuscript documents quoted in this part were translated from the original French by the authors.

8 AEN, file "BOREL PIERRE-ABRAM-15," document from 30 November 1827 signed by Eugène Borrel, Gustave Borrel and Charles Louis Borrel.

9 Translation from the original French by the authors.

individuals for 1,500 to 2,000 francs in France to support the Swiss settlers or the tanners, according to Galofaro (2024, p. 151).¹⁰

A diplomatic history: integrating Switzerland into the Brazilian empire via Portugal and emigrants from Neuchâtel

What is particularly interesting here are the relatively unexplored connections between the colonial world—in this case, Brazil—and diplomacy. Records at the State Archives of Neuchâtel indicate a significant number of Swiss diplomats working in Brazil to support Swiss settlers, especially prominent Swiss merchants in the region, while also benefiting from these trade networks themselves. Such is the case of Paul Jacques-Albert, Jacques-Henri Gretilat, and Charles Perret-Gentil, described as the Trade Consul of the Confederation (Consul de commerce de la Confederation) in Rio de Janeiro. Perret-Gentil was granted a “Letter of Full Powers” to negotiate and sign the Special Treaty on Trade Relations on June 18, 1842.¹¹ This document was signed by the Chancellor of the Swiss Confederation in Bern. Perret-Gentil served as Consul General in Brazil from 1840 to 1853. In Brazil, he became interested in the issue of Swiss immigrants in the Empire and advocated for organized immigration to the coffee plantations in western São Paulo. In 1851, he acquired a large portion of the Superagui Peninsula on the coast of Paraná, where he founded the Colônia de Superagui.¹²

Documents on diplomatic exchanges between Brazil and Switzerland, mediated via the Portuguese Consul in Switzerland, reveal intriguing negotiations. Two letters discuss the possibility for Switzerland to exploit land in Brazil with the aim of accessing colonial resources. These resources included sugar, coffee, and tobacco, among others. The letters also mention Swiss settlers potentially receiving assistance from Portugal to develop these lands. The prospect of extraordinary profits from these ventures is highlighted, and the “right to possess negros” is explicitly mentioned. There is no way of affirming that Bern and the Swiss diplomacy were not aware of

10 The conditional is obligatory in this case, since Galofaro’s passage is not very clear. She attributes (without detailed reference) this information to Veyrassat, but we found no direct reference to Borel in her book (Veyrassat, 1993, p. 135). At the same time, Galofaro (2024) consulted many new archives in Rio de Janeiro that shed light on the presence of Neuchâtel migrants in Brazil.

11 Arquivo Histórico do Itamaraty no Rio de Janeiro (AHIRJ), archival code P18-M33_1842-06-18, “Carta de Plenos Poderes conferida a Charles Perret Gentil, Cônsul-geral da Suíça, para conferida negociar e firmar o Tratado Especial sobre Relações Comerciais, em 18 de junho de 1842. Documento assinado pelo Chanceler da Confederação Suíça.”

12 Arquivo Histórico do Itamaraty no Rio de Janeiro (AHIRJ), archival code P18-M33_1842-06-18, “Carta de Plenos Poderes conferida a Charles Perret Gentil, Cônsul-geral da Suíça, para conferida negociar e firmar o Tratado Especial sobre Relações Comerciais, em 18 de junho de 1842. Documento assinado pelo Chanceler da Confederação Suíça.” This information was taken from the AHIRJ database: <https://atom.itamaraty.gov.br/index.php/p18-m33-1842-06-18> (accessed 12 December 2024).

Swiss colonizers profiting directly from a slave-based economy such as Brazil was until the end of the 19th century:

Brazil today offers a vast territory to Swiss industry. As the Consul of Portugal in Switzerland, I have the honor of presenting these opportunities to Switzerland. The Swiss will be treated as Portuguese nationals naturalized as Brazilians and will benefit from free land grants. His Most Faithful Majesty will cover the travel expenses for poor Catholic families, assist them in settling, provide them with livestock and seeds, and support their needs during the first two years.

Swiss individuals wishing to cultivate colonial goods such as sugar, coffee, cotton, tobacco, and indigo will be granted lands suitable for these crops. Depending on their capital, they will receive concessions of varying sizes and, like the Portuguese, will be allowed to employ enslaved labor.¹³

This is a confidential note presented by the Consul of Portugal in Switzerland to the “most honorable Lords, Presidents, and members of the Council of State of the Canton of Neuchâtel, according to the authorization of his Court.” In the note, he also states that:

The initial negotiations, initiated by the Canton of Fribourg, limit the first expedition to one hundred families, mostly from this canton. If successful, other expeditions will follow.

His Most Faithful Majesty will only accept honest individuals. The cantonal governments will be asked to select families based on royal criteria and provide certificates of good conduct.¹⁴

Although the cases of elite families such as the de Meurons and the Borels do not precisely match the requisite of being Catholic, they certainly had the means to establish themselves in Brazil with their own resources, buying land and enslaved labor, as shown above. Since the economic situation was hardly favorable during the decades to come, many Swiss sought to emigrate. In 1854, it was estimated that 15,000 to 18,000 Swiss emigrated—a considerable number given the population at the time (Wasserfallen, 1999, p. 91). Most crossed the Atlantic to settle in the United States or South America, particularly Brazil. When accusations of the mistreatment of

13 AEN, archival code RE AEN 4ACHA-15, “Correspondance avec l'étranger: Lettres du Brésil”: letter from the Portuguese Consul in Switzerland to the members of the government of Neuchâtel, 10 June 1818. Translation from the original French by the authors.

14 AEN, archival code RE AEN 4ACHA-15, “Correspondance avec l'étranger: Lettres du Brésil”: letter from the Portuguese Consul in Switzerland to the members of the government of Neuchâtel, 10 June 1818. Translation from the original French by the authors.

Swiss settlers in Brazil arose, the Federal Council sent Johann Jakob von Tschudi on a special mission to advocate on their behalf in 1860 (Bartoletti, 2024).

Before this journey on behalf of the Swiss Confederation (1860–1862), Von Tschudi traveled to the Americas in 1838–1842 and 1857–1858. Besides Brazil, he had lived in countries such as Chile, Peru, and Argentina. The several years he spent overseas as an emigrant and scientific researcher enabled him to bring home many botanical and ethnographic collections and sacred objects, some of which were returned by Switzerland to Bolivia in the 21st century (Bartoletti, 2024). Neuchâtel inherited hundreds of these objects: the Museum of Natural Sciences in Neuchâtel and some of the great families of the city, such as the Coulons, financed the travels of von Tschudi, who often used Neuchâtel watches as currency in his overseas dealings (Bartoletti, 2026). The development of Neuchâtel's cultural patrimony and its watchmaking exports were thus unsuspectingly connected thanks to long-range migration.

FROM LATIN AMERICA TO SOUTHERN AFRICA: HOW THE COLONIAL WORLD CONTRIBUTED TO THE DEVELOPMENT OF NEUCHÂTEL (FROM THE MID-19TH TO THE EARLY 20TH CENTURY)¹⁵

Migratory connections between Neuchâtel's watchmaking and colonialism

The export of Swiss watches to Latin America in the "Long 19th Century" was often initiated by travelers and migrants such as von Tschudi and, above all, by numerous businessmen and watchmakers from Neuchâtel who experienced a long-range migration. People like Auguste Leuba (1798–1860) from Buttes and Henri Grandjean (1803–1879) from Le Locle, the focus of the following paragraphs, represented this migration/export combination. They enriched themselves by diversifying their economic activities and favoring the import of colonial raw materials extracted mainly in Brazil through systemic colonial violence that some authors have associated, for this emerging industrial era, with a "second slavery" (Tomich & Zeuske, 2008). Thanks to these paths, they could also invest time and money in public projects or political careers.

Of the abovementioned actors, Leuba and Grandjean, historiography has traced some biographical outlines. The former emigrated to Rio de Janeiro in 1822, where he founded the watchmaking firm Auguste Leuba & Cie and was then joined in 1828 by a homonymous man from Buttes who took over the management of the business, enabling the founder to return home in 1832. After returning to Switzerland,

¹⁵ This case study, by Fabio Rossinelli, is part of the completed SNSF-funded project "Migrations and development in mountain borderlands of Switzerland and Slovenia: a comparative perspective (18th–20th centuries)" (no. 192201, 2020–2023), Università della Svizzera italiana.

Leuba settled in Le Locle, where he actively participated in the local and cantonal political scene: he took part in the republican revolution of 1848, which arose from this town; he became a member of the provisional government, and then State Councilor of Neuchâtel (Guye-Bergeret, 2024). His descendants also played an essential role in the politics of the canton and the country (Klauser, 2007), investing in the railway development of Neuchâtel like their ancestor (Godet, 1912, p. 158) and securing business in Brazil at least until 1908 (Veyrassat, 1995, p. 20). What was this business? The production and sale of watches in Rio de Janeiro, of course, but also the export of other Swiss products to Brazil, for example, embroidery and spir-its; and finally, maybe above all, the import of Brazilian coffee to Switzerland, for which a branch was opened in Santos, a coastal city close to São Paulo, and another in Paris around 1844 (Veyrassat, 1993, pp. 416–417). Two points should be emphasized at this stage. Firstly, the national historiography of the Swiss economy has given little attention to import aspects from the colonial world (Bairoch & Körner, 1990). Secondly, international—and especially non-European—historiography has highlighted how coffee production and exploitation in Brazil during the “Long 19th Century” was based on a system of violence and enslavement that went beyond the official abolition of slavery in 1888 (Bivar Marquese, 2013). It was, therefore, by relying on such exploitation that the Leuba watchmaking family integrated an overseas economy for generations, from which they profited enough to move their business from a family dimension to a multinational one through this migratory trajectory (and return migration) Auguste Leuba and his sons were able to launch themselves into politics in their own country and work for its development—just as it was the case with Swiss colonial mercenaries like Louis Wyrsh (1793–1858), co-founder of the unitary state of Switzerland in 1848 (Schär, 2022).

Similar to Auguste Leuba, the watchmaker Henri Grandjean had a similar path: he experienced a social ascent by emigrating from Switzerland to Brazil and other Latin American countries between 1823 and 1831 and found in the overseas market a source of income that allowed him to return home and establish himself there as a watchmaker, philanthropist, and politician—taking part, just like Leuba, in the Neuchâtel revolution of 1848, but also later financing railways, watchmaking schools, social activities, and housing constructions to connect the town of Le Locle to the rest of the canton and country. Again, Grandjean and his brothers—and their father before them—took advantage of the conditions in Brazil under imperial rule, extracting raw mineral materials useful for the production of watches in Le Locle and trading with the Brazilian emperor Pedro I. As in the case of Leuba, Grandjean operated in other market spheres, for example, agricultural exploitation in the Andes of Peru, which passed into a more liberal system under British informal imperialism post-1824 (namely after Peru gained its independence from Spain) (Rossinelli, 2023b, p. 108–113).

Far from being limited to Latin America, the emigration of watchmakers out of Neuchâtel also arrived in other countries and territories, such as the Ottoman Empire

(in the region that is now Turkey)—and this generated material consequences in Neuchâtel. It was the main theatre of the watchmaking enterprise David Lebet & Fils Victor, or simply, Lebet & Fils, which specialized in the Ottoman watch market from Buttes and founded a branch in Constantinople (today's Istanbul) around 1845, managed by migrants of the same family, like Alphonse Lebet (1819–1892) (Guye-Bergeret, 2024). The generations of this family, whose watchmaking activities were initiated by David-Louis Lebet (1778–1847) and his son Louis-Victor Lebet (1800–1877), became part of the complex imperial context of Turkey, where a Swiss colony was established around 1850 (David, 1999). Other migrants from Neuchâtel participated in the life and administration of this colony, such as Edouard Huguenin (1856–1926), who, returning home two months a year, continued to take a “moral and financial interest in the local life of Le Locle” (cited in: David, 1993, p. 81).¹⁶ Still unpublished sources in the Neuchâtel State Archives show how the Lebet fortune favored buying and selling land in Buttes through brothers and other close family members who remained at home.¹⁷ At the same time, in 1861, the aforementioned Louis-Victor Lebet purchased the site known as Le Gor du Vauseyon for 50,000 Swiss francs—a sum equivalent to the annual salary of 77 workers in the Swiss textile industry at the time (Historical Statistics of Switzerland, n. d.).¹⁸ The property was crossed by a watercourse suitable for mills and located near a large villa, La Maison du Prussien, where Lebet lived. This complex, which he sold in 1884, is now a tourist site in Neuchâtel and the Jura region (Garin & Graef, 1987, pp. 34–36).

Until now, we have mentioned how the emigration of watchmakers to distant lands—in particular to Latin America and the Near East—had an impact or at least an influence on the development of the Canton of Neuchâtel (facilitating political careers, public and private investments, or own use of the resources generated), a historiographical field that is still little addressed is the direct relationship between watchmaking and colonialism (Scheurer, 1998; Scheurer, 2001). More specifically, the import or trade of raw materials from Africa that are useful for watchmaking production in Neuchâtel is still largely underestimated.

Between the late-19th and early 20th century, part of the cantonal elite took an interest in emigration to the African continent, encouraged by the years of the Berlin Conference (1884–1885), which also saw the creation of a Geographical Society in Le Locle (Société neuchâteloise de géographie). There was much excitement around the project that Paul Perrin, a Neuchâtel trader who had emigrated to the Transvaal with his brother Jules in 1872, launched in Switzerland via the geographical societies when he returned in 1886: he promised, through the foundation of a

16 The original source is an obituary that appeared in *Le Véritable Messager boiteux de Neuchâtel pour l'an de grâce 1927*, p. 45. Translation from the original French by the authors.

17 AEN, archival code G165-G169, “Actes notariés”. They are Alphonse (1789–1864) and Victor (1779–?), two brothers of the founder of Lebet & Fils, David-Louis Lebet (1778–1847).

18 Average of the entry “Spinner, Weber, Drucker, Sticker” for the years 1860–1865. The calculation was made on 300 working days per year.

Swiss–African Company, to encourage emigration and trade to Southern Africa with a focus on the import of gold, which, along with silver and platinum, was the main component of watch production. Watchmakers in Neuchâtel were the main workers of precious metals, for example, in minting, foundries and goldsmiths; leading political figures in this canton then pushed through two national laws, in 1880 and 1886, to improve Switzerland's economic competitiveness in this sector. Federal Councilor Numa Droz, also from Neuchâtel, encouraged Paul Perrin's migration and trade project—who had previously sent geological samples of soil from Southern Africa from the Transvaal to Switzerland (Boillat, 2016; Rossinelli et al., 2024, pp. 16–21).

Although Perrin's project was not realized, several Neuchâtel families or enterprises, such as the watchmakers DuBois, relied on it to plan an emigration to the Transvaal. With a long migratory tradition, this family from Le Locle founded the first watchmaking factory in Switzerland in 1785, DuBois & Fils, which was run for two centuries from father to son, establishing branches inside and outside Europe. The Transvaal gold became so much a part of the migratory and entrepreneurial strategies that two DuBois brothers, Philippe (born in 1866) and Jean (1869), emigrated and settled there in 1887 and 1891, respectively, until the end of the century. With the support of relatives in Le Locle and Frankfurt am Main—the latter being home to the mother's side, the Andreae family, who headed the Deutsche Gold- und Silberscheideanstalt (German Gold and Silver Refining)—Philippe and Jean DuBois became part of the transnational networks of colonial exploitation in Southern Africa. They built a million-dollar business in the gold market with their own mining installations in places such as Johannesburg, Pietersburg, and Pretoria. Investors from Neuchâtel took advantage of this entrepreneurial emigration by pocketing 8% dividends for ten years, while the family had direct and unmediated access to the precious metal that was the basis of watchmaking production (Rossinelli, 2023b, pp. 116–117; Rossinelli, 2025, pp. 83–85).

The hidden role of missionaries from the Jura Mountains

This case study opens the door to several other actors who tend to be excluded from the "classic" emigrants who contributed to the development of Neuchâtel: missionaries. These were either collaborators of the DuBois brothers in their mining enterprises, such as the missionary Honoré Schlaefli (1858–1940), or competitors, such as Paul Berthoud (1847–1930), both from the Jura Mountains and both active in the Geographical Society based in Le Locle.¹⁹ Many emigrants from Neuchâtel were in the service of the Swiss Mission (Mission romande), such as Arthur Grandjean (1860–1930) and Alexandre-Henri Junod (1863–1934), who contributed to the stabilization of relations between white entrepreneurs and black workers—themselves often

19 Archives cantonales vaudoises (ACV), archival code PP 1002 O 08.51-08.60, box no. 38476: letter from Fehr & Dubois to Paul Leresche, 13 May 1893.

migrants (Crush et al., 1991)—in the goldmines of Southern Africa (Schaufelberger, 1985). Grandjean wrote numerous essays on the work of the Swiss Mission, highlighting how this reality in the African continent had represented a development of organized solidarity in Switzerland (Grandjean, 1917) and how “a Swiss colony in the North of the Transvaal”²⁰ had been created thanks to the missionaries (many of whom came from the Jura Mountains) which allowed them to encourage Switzerland to establish bilateral relations with the Boer government (Rossinelli, 2024). Junod, for his part, contributed to the study of the “primitive races” of the black people of Mozambique, who often emigrated and worked in the mines of Southern Africa under European control. He published dozens of studies in Switzerland and Europe that had a major impact on the spread of an imperial culture, stimulating racial segregation in the 20th century and struggles for independence. Last but not least, a large part of the collections of the Ethnographic Museum in Neuchâtel came from Junod (Harries, 2007).

Georges Reutter (1875–1946), a doctor originally from La Chaux-de-Fonds, also contributed to this museum’s collection when he emigrated to Barotseland (today’s Western Province of Zambia) on behalf of the Paris Mission. Distinguished for disseminating the use of quinine as a sanitary method to prevent malaria in the South African colonies (Mackintosh, 1974, p. 276), Reutter was also a prolific photographer whose material was used to stimulate the mission’s fund-raising efforts (Peggie & Burke, 2014) in which several Neuchâtel actors occupied key positions since 1824. Reutter’s still unpublished travel diary, kept in the archives of the Neuchâtel Ethnographic Museum, reveals how missionary emigration created a lasting connection for the people of the Jura Mountains with colonial Africa.²¹ Thanks to our cross-referencing of this source with other documents (in particular collected in the database on the Paris Mission: Pampana & al., 2022), we have attested that the Neuchâtel missionary David-Frédéric Ellenberger (1835–1920), who emigrated to Basutoland (today’s Lesotho) in 1860, was the father of Alfred Ellenberger (1863–1929) and the latter pioneered the money transfer system of this country in 1901 via the British “Standard Bank” (Maliehe, 2021, pp. 74–75). On another front, Reutter had the opportunity to meet in the mission station of Paul Germond (1835–1918) and his son Louis Germond (1861–1941), the former Swiss consul in Pretoria, who seems to have engaged in the Second Transvaal War (with his family) on the side of the Boers

20 Archives cantonales vaudoises (ACV), archival code PP 1002 O 3/5, box no. 39079: “Une colonie suisse au N[ord] du Transvaal,” handwritten document by Arthur Grandjean, undated (but between 1888 and 1896).

21 Archives du Musée d’ethnographie de Neuchâtel, Entrée 1977: six notebooks representing the diary of Georges Reutter between 25 January 1902 and 28 April 1904, preserved in an envelope stating “Copié par [copied by] Mr. Henri Perret.” The notebooks contain a total of 207 pages and are numbered consecutively.

and then fled to Lesotho in 1902: Edouard Costançon.²² Already a settler in Algeria, he was a close collaborator of missionaries and businessmen in Southern Africa and contributed to the success—as did his successor at the consulate, Carl Fehr—of the entrepreneurial emigration of the DuBois watchmakers and their gold business, mentioned earlier (Rossinelli, 2024).

All these actors and events related to the African continent during colonization affected the local realities of Neuchâtel. New research on this topic is needed. It will be possible to show how watchmakers became directly integrated and interested in the colonial world and how missionaries did not only have an impact in the colonies but also at home—even collaborating with the watchmaking business. The categories of watchmakers and missionaries are rarely seen as migrants. However, they are fully part of the development of Neuchâtel due to migration—which was based not only on Swiss or European geography but also on a global and colonial one.

CONCLUSIONS

As we have argued, the analysis of the migration history in Neuchâtel seems to be based on a “double historiography.” The first focuses on short-range and medium-range migration, emphasizing its role in the Canton’s demographic, economic, and social development. The second, more recent and limited, examines long-range migration but tends to disconnect these movements from the processes of development of Neuchâtel. This dichotomy limits our understanding of the impact of migration on the area of origin.

The case studies presented in this article show that this historiographical separation is unfounded. The example of the Meuron and Borel families illustrates how their transatlantic connections, based on the slave economy of Brazil, passed through regional, European and global networks and how all this directly influenced the development of Neuchâtel—via transfers of property from one family generation to the next, or investments in the health sector. The example of the watchmakers Leuba, Grandjean, Lebet, and DuBois, who emigrated to the imperial and colonial world of Latin America, the Near East, and Southern Africa, also shows that their stays on foreign lands had an impact on the economic and social life of Neuchâtel. Moreover, far from being a separate migratory body, the missionaries did play a part in this, contributing to the activities and stability of the Swiss and Neuchâtel people, particularly in the Transvaal, Lesotho, and elsewhere—not forgetting their key role in the development of museums and collections in Neuchâtel.

What we have shown through our own completed or ongoing research are, in fact, only case studies—based, however, on traditional literature (read with

22 Archives du Musée d’ethnographie de Neuchâtel, Entrée 1977, p. 48 (31 March 1902). The report of this military engagement appeared in several Swiss newspapers, like *Le Journal du Jura* (26 January 1900), p. 3.

fresh eyes), on recently published works (which present current findings) and on as-yet-unpublished archives (which have yet to be explored). This invites us to continue research in this field and to change the paradigm of migration history and the impacts of migration, broadening the range of analysis in a more inclusive way to historiographical terrains that are still marginal and separate. To overcome the current limitations of historiography, it is essential to rethink the history of migration by systematically integrating its colonial and global dimensions. Neuchâtel, by its geographical location and specific historical features, is a perfect illustration of the need to re-examine these interactions. This case study may inspire similar research in other peripheral or mountainous regions of Europe, often perceived as isolated or disconnected from broader historical processes (Viazzo, 1989, p. 12) from broader historical processes, despite their relevance to world developments in the “Long 19th Century.”

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POVZETEK

GOSPODARSKE IN DRUŽBENE POSLEDICE KOLONIALNEGA IZSELJEVANJA NA KANTON NEUCHÂTEL SKOZI »DOLGO 19. STOLETJE« Fabio Rossinelli, Ricardo Borrmann

Avtorja v prispevku obravnavata zgodovino migracij v švicarskem kantonu Neuchâtel v »dolgem 19. stoletju« z regionalnega, evropskega in globalnega vidika. Neuchâtel je bil zgodovinsko vključen v evropske migracijske tokove in globalne kolonialne procese, zato so na njegov razvoj močno vplivali migracijski tokovi iz bližnjih in oddaljenih delov sveta ter njegove povezave s kolonialnimi sistemi, čeprav Švica ni imela uradnih kolonij. Avtorja osvetlujeta, kako so te migracije vplivale na gospodarski in družbeni razvoj te regije, hkrati pa izpostavljata pogosto spregledan vpliv kolonialnih povezav.

Kanton Neuchâtel je bil pomembno središče migracij iz bližnjih in oddaljenih delov sveta, zlasti po prihodu hugenotov iz Francije po preklicu Nantskega edikta leta 1685. Ti priseljenci so prispevali k razvoju urarstva, ki je postalo ključna gospodarska panoga v regiji. Industrijski razvoj Neuchâtla je bil povezan s kolonialnimi surovinami, kot so bombaž, kava in tobak, ter s kapitalom, pridobljenim s kolonialno trgovino in izkoriščanjem.

Neuchâtel je bil zlasti prek bogatih družin, kot sta bili de Meuron in Borel, ki sta trgovali v Braziliji in južni Afriki, vpet v globalne kolonialne mreže. Te družine so vlagale v lokalne projekte, kot so bolnišnice, s čimer so pomembno prispevale k razvoju kantona. Vendar pa sodelovanje s kolonialnimi državami ni bilo omejeno le na trgovino. Švicarski urarji so svoje izdelke izvažali po vsem svetu, iz kolonij pa so uvažali surovine, potrebne za njihovo proizvodnjo.

Tradicionalne zgodovinske obravnave kantona Neuchâtel se osredotočajo predvsem na lokalne migracije in pogosto zanemarjajo vlogo migracij iz oddaljenejših držav ter njihov vpliv na razvoj kantona. Avtorja zato pozivata k »deevropeizaciji« zgodovine Neuchâtla za boljše razumevanje povezanosti kantona z globalnimi in kolonialnimi procesi. Pri tem poudarjata, da migracijski narativi Neuchâtla nimajo zgolj lokalnega ali evropskega značaja, temveč so tesno prepleteni s kolonializmom in globalnimi povezavami. Kot trdita, bi bilo za celovitejše razumevanje migracijskih in gospodarskih zgodovin treba podrobneje raziskati te medsebojne vplive. Neuchâtel predstavlja nazoren primer regije, katere identiteta se je izoblikovala pod vplivom globalnih in lokalnih procesov, ki so vplivali na razvoj kantona, pa tudi njegove širše okolice.

LONG-TERM MIGRATION AND REMITTANCES IN THE ALPINE DISTRICT OF GORNJI GRAD: HUMAN AGENCY AMID ENVIRONMENTAL AND SOCIAL CONSTRAINTS

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ABSTRACT

Long-Term Migration and Remittances in the Alpine District of Gornji Grad: Human Agency Amid Environmental and Social Constraints

This article examines emigration from the Alpine district of Gornji Grad between the late 19th century and the early 20th century, focusing on the interplay between environmental constraints and human agency. It analyzes how hereditary and marriage customs, timber cutting and rafting, and migration functioned as adaptive responses to environmental limitations and as agents for economic diversification. The study also explores the reciprocal effects of migration through financial and social remittances.

KEYWORDS: alpine communities, Gornji Grad, migration, integrated peasant economy, financial and social remittances

IZVLEČEK

Dolgoročne migracije ter denarni in socialni transferji v alpskem okraju Gornji Grad: Odziv prebivalcev na okoljske in družbene omejitve

Avtorici v prispevku obravnavata izseljevanje iz alpskega okraja Gornji Grad med koncem 19. in začetkom 20. stoletja s poudarkom na prepletu okoljskih omejitev in človekovega delovanja. Analizirata, kako so dedni običaji in poročne navade, sečnja in splavarjenje lesa ter migracije delovali kot prilagoditveni odzivi na okoljske omejitve in hkrati kot element gospodarske diverzifikacije. Predstavita tudi povratne učinke migracij na domačo skupnost preko finančnih, in socialnih transferjev.

KLJUČNE BESEDE: alpske skupnosti, Gornji Grad, migracije, integrirana kmečka ekonomija, denarni in socialni transferji

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INTRODUCTION

The historical study of upland communities as environments shaped by specific natural conditions has long attracted scholarly attention. Because farming staple crops is more difficult at higher altitudes, scholars have traditionally viewed environmental constraints as key to understanding life in mountain communities. In his 1989 book, *Upland Communities: environment, population, and social structure in the Alps since the sixteenth century*, Pier Paolo Viazzo illustrates how, since the 1960s, many scholars have viewed Alpine societies as homeostatic systems, maintaining stability through mechanisms that adjusted the population to the limited natural resources. Hereditary customs, marriage traditions, and other methods of population regulation (such as breastfeeding, contraception, and seasonal work) were often seen as such mechanisms, alongside both seasonal and permanent emigration. Viazzo then demonstrates that neither marriage and inheritance practices nor the causes of migration in the Alpine region conform to a uniform pattern, as they responded both to environmental constraints and to socioeconomic factors (Viazzo, 2014).

More recent research by Aleksander Panjek and his colleagues has offered another compelling perspective on these dynamics. Their concept of the “integrated peasant economy” emphasizes that peasants were not merely passive actors subject to environmental and other constraints but active agents who, through various agrarian and non-agrarian activities, actively sought ways to improve their standard of living whenever possible.

According to Panjek, it was precisely human agency and the desire to overcome natural limitations that drove economic and social change. A limited mountainous environment, therefore, did not merely represent an obstacle but often catalyzed innovative combinations of different income sources (Panjek, 2023).

Yet, where do long-term and permanent migrations fit within these theoretical frameworks? Were they in mountainous areas part of maintaining balance in an environment with limited natural resources, or, as Panjek’s concept suggests, were they part of an integrated peasant economy capable of accumulating resources even beyond the home territory? The concept of the integrated peasant economy does not exclude the temporary integration of income for the mere purpose of basic survival. Yet, it emphasizes that peasants of various statuses and wealth also displayed initiative to go beyond the threshold of mere subsistence (Panjek, 2023, p. 89). This raises the question: to what extent were permanent migrations from mountainous regions part of survival strategies, and to what extent were they an expression of active efforts to overcome environmental, social, and other limitations? Clearly, there is no definitive answer to this, as Panjek also notes, “what was originally a matter of choice could later become a necessity” and vice versa (Panjek, 2023, p. 89). The function of any activity of the integrated peasant economy changed over time, depending on broader social conditions.

This paper does not seek a definitive answer regarding the function of long-term and permanent migration from mountainous areas, nor does it attempt a comprehensive chronological analysis of how this function evolved. Instead, through a case study of emigration from the Alpine community of Gornji Grad in the north of present-day Slovenia during the last two decades of the 19th century and the first three decades of the 20th century, it seeks to shed light on migration as a phenomenon shaped by the interaction between natural conditions and human agency. This will be done by placing emigration in the context of the district's geographical features, hereditary and marriage customs, and timber cutting and rafting activity, which—alongside agriculture—were the most important elements of the integrated peasant (and non-peasant) economy.

In the second part of the paper, we will focus on the reciprocal effects of emigration on the local community. We will explore the economic and social transfers, commonly known as remittances, between the new and old homelands of emigrants from the Gornji Grad district. We will not limit the term remittances to financial transfers but will instead distinguish between financial and social remittances. In this context, we draw on Peggy Levitt's definition, which views social remittances as a "local-level, migration-driven form of cultural diffusion," further explaining that these are "ideas, behaviors, identities, and social capital that flow from receiving to sending-country communities" (Levitt, 1998, p. 926). It is important to note that remittances, of course, flow in both directions.

This article is based on a review of archival materials from the Emigration and Immigration Department at the Archives of the Republic of Slovenia, relevant sources from the Regional Archives Maribor and the Archdiocesan Archives Maribor, emigration press and other publications by emigrants in the United States, printed sources from the interwar period, relevant literature, and interviews with the descendants of nine individuals who emigrated from the district of Gornji Grad during the studied period. Despite the extensive material reviewed, only fragmented data could be collected. Furthermore, the sample of emigration life stories—based on interviews with Prodnik, Kolenc, Mlinar, Remic, Weiss, and Čretnik, and the personal archives of Kolenc, Mlinar, and Čretnik—is too small to allow for definitive and unambiguous conclusions. Nevertheless, the materials provide some insights, raise important questions, and suggest possible interpretations.

THE DISTRICT OF GORNJI GRAD

The former district of Gornji Grad is located in northern Slovenia, with its northwestern section bordering Austria. Historically, this area was part of the Duchy of Styria but also bordered Carinthia (for instance, the village of Solčava gravitated toward Carinthia in the 19th century due to poor transportation connections with the rest of the region under discussion). The district's terrain is predominantly hilly and partly

mountainous. The most mountainous areas are the Savinja Alps, with peaks exceeding 2,000 meters in elevation, which once marked the district's northern and partially western borders. Slightly lower peaks can be found in the Karavanke Mountains to the north. Two rivers, the Savinja and the Dreta, define the district, flowing through its two main valleys, named after the rivers—the (Upper) Savinja Valley and the Dreta Valley (Zadrečka Valley). These valleys were historically significant, enabling timber rafting from late winter to late autumn. Flatlands are found only between the towns of Ljubno and Mozirje, where the Savinja Valley widens somewhat, as well as in parts of the Dreta Valley, in the lower course of the Paka River in the easternmost part of the district. Elsewhere, the valleys are narrow and surrounded by hills and mountains (*Krajevni leksikon*, 1937, p. 162).

In the 1930s, the district had the lowest population density in the entire Drava Banovina, which represented the Slovenian part of the Kingdom of Yugoslavia (excluding the western part of present-day Slovenia, which was under Italian rule at the time). The average population density in the Banovina was 72.6 inhabitants per square kilometer, while in the Gornji Grad district, it was only 33. This is understandable, given the hilly terrain and extensive forest cover. The district's inhabited areas were primarily in the valley regions along the river basins and in its flatter southeastern part. In the mountainous northwestern part, there were scattered mountain farms, which reached elevations of up to 1,250 meters (*Krajevni leksikon*, 1937, p. 162–163). In terms of household size, the district ranked second in the Banovina. At that time, the average household in the district consisted of 5.27 people, compared to the Banovina's average of 4.87. The average size of landholdings in the district was also comparatively larger than in other parts of Slovenian territory. In 1937, as much as 23% of the landholdings exceeded 20 hectares, a notably high percentage given the general fragmentation of land in Slovenia, where very small holdings predominated. Only the neighboring district of Dravograd, which was also partly mountainous and located near the present-day border with Austria, had a higher percentage of such large holdings. However, it is also important to note the relative scarcity of medium-sized holdings. A significant proportion—52%—of landholdings in the Gornji Grad district were smaller than 5 hectares (calculated based on data from *Statistički godišnjak*, 1938). These smaller holdings were particularly common in the central part of the former district, which is flat.

The district was food-deficient, producing less food than it needed. In 1934, the total cereal production (including corn) per farm worker amounted to 93 kilograms. Only four of the twenty-three districts in the Drava Banovina produced less per farm worker. The district produced 129 kilograms of potatoes per farm worker, which, along with cereals, was the primary source of carbohydrates. This production was also very poor compared to other districts. Only three other districts produced fewer potatoes per farm worker (Calculated based on data from *Krajevni leksikon*, 1937, p. 71–610). According to the estimates of the district doctor of the Ljubljana area, in 1938, the average resident in the Ljubljana surroundings consumed 181 kilograms

of cereals and 180 kilograms of potatoes per year (Pirc, 1938, p. 92). When we compare the above-mentioned estimate with the production data from the Gornji Grad district, it quickly becomes clear that production was well below the nutritional needs (even when considering that the estimate of food consumption was made for the area surrounding the capital, Ljubljana, and may therefore be somewhat higher).

According to the 1931 census, the district ranked fourth in illiteracy among residents aged 10 and over. Of those over 10 years old, 9.2% were illiterate, placing the district fourth among all districts (the average for the Banovina was 5.6%). As was generally the case in the Banovina, the illiteracy rate was higher among women than among men (women 9.7%, men 8.7%) (*Definitivni rezultati*, 1938). This may have been related to the fact that certain parts of the district were very poorly connected to the rest of today's Slovenia. For example, the road to the highest-lying municipality in the district, Solčava, was only built in 1894. Before that, one had to cross the Savinja River 22 times to reach Solčava. From Solčava to Logarska Valley, it was only possible to travel via a narrow path, which was not drivable until 1924. The district remained poorly connected by transport to other parts of the country for a long time. Even in the 1930s, except for a few kilometers of the Celje–Dravograd railway line, the entire district was without a railway (*Krajevni leksikon*, 1937, p. 163—164).

The main source of livelihood for almost 70% of the population in the early 1930s was “agriculture, forestry, or fishing” (the census category), with forestry and livestock farming being of central importance (calculated based on data from *Definitivni rezultati*, 1940). Fields occupied less than a tenth of the district's area, with the proportion of land used for crop farming increasing from west to east, from about 5% to around 20% of the area. Around a quarter of the district was covered by meadows and pastures. Sheep farming and goat breeding were particularly common in the municipalities of Solčava and Luče. In some lowland areas, hops also thrived (*Krajevni leksikon*, 1937, p. 163). The district was heavily forested, with forests covering more than half of its area in the 1930s. Water sawmills along the rivers were used for sawing timber (*Krajevni leksikon*, 1937, p. 163). Apart from the wood industry, where small workshops predominated in the Upper Savinja Valley, no other noteworthy industries existed. During the interwar period, tourism increasingly developed in these areas.

MARRIAGE AND INHERITANCE CUSTOMS

Marriage freedom was introduced relatively late in Styria, which included the Gornji Grad district during the Habsburg period. While considerable marriage freedom—including for servants and daily-paid agricultural workers (*dninarji*)—was established in Carniola as early as the 16th century, marriage permits were still used in Styria in the 18th century. However, even after the final abolition of marriage permits in 1868, regional differences in marriage age persisted. In 1900, the marriage rate

index, which shows the arithmetic mean of the shares of married women in the childbearing period, was higher in all regions (except Carinthia) than in Styria. In Styria, it was 0.398; in Carniola, 0.449; in Istria and Gorizia, more than 0.5; and in Prekmurje, more than 0.6. The index of marital fertility in Styria in 1900 was 0.641; in Carinthia, 0.640; while in Carniola, it was 0.827, suggesting a higher marriage age in Styria and Carinthia. It should be noted that such marriage customs contributed to a higher proportion of illegitimate children. The index of non-marital fertility in 1900 was 0.130 in Styria, 0.219 in Carinthia, and 0.046 in Carniola. However, data on general fertility for the year 1900 show that, despite this, fertility in Styria was relatively low—the general fertility index was lower than in Styria only in Trieste; all other regions showed a higher general fertility index (Šircelj, 2006, pp. 64–74).

A higher marriage age was also observed in some mountainous communities in Carinthia, which exhibited marriage and fertility patterns similar to those in Styria. This suggests that delayed marriage and a higher proportion of permanently unmarried individuals may have been particularly characteristic of or may have persisted longer at high altitudes in the north of today's Slovenia in general. Milivoja Šircelj, for example, demonstrated that the Carinthian municipalities of Strojna and Sele (located at 1000–1060 m and 860–1100 m above sea level, respectively) showed much higher average ages at marriage for both grooms and brides from the mid-19th to the mid-20th century, compared to selected municipalities in other parts of the Slovenian ethnic territory. For instance, grooms married at an average age of 32–35 years and brides at 27–31 years, whereas in Velike Brusnice, a former Carniolan municipality, the average age was 27–28 for grooms and around 25 for brides (Šircelj, 2006, p. 71). This may indicate that such patterns also persisted in the district of Gornji Grad, or at least in its higher-altitude areas.

Regarding inheritance customs, scholars have long maintained a general view that in higher-altitude areas, the principle of indivisible inheritance—where a single heir, usually the eldest son, inherited the estate—prevailed as an adaptation to harsher agricultural conditions. This reduced the marriage rate, as the younger siblings found it more difficult to marry without having the promise of a future inheritance. Data on land ownership structure in the Gornji Grad district between the two world wars suggests that inheritance by a single heir, in general, persisted (at least) in higher altitudes, as the municipality of Solčava, being the highest in the area, had the fewest estates per capita (calculated based on data from *Krajevni leksikon*, 1937, pp. 162–174).

However, the situation in reality was far from uniform. Nataša Henig Miščič, Leonida Brondič, and Aleksander Panjek note that in the mountainous areas of Carinthia, according to the indivisibility principle, large and medium-sized farms, supported by the labor of farm servants, were also perceived to be predominant. Unmarried uncles and aunts (the master's siblings) were believed to have lived on the farm as part of the household. At the same time, however, the authors emphasize that the agrarian structure was by no means static. On poorer land, sometimes

even on communal land, smallholdings (*kajže*) emerged, which were not agriculturally self-sufficient and had to rely on other forms of income. They highlight that, according to Franciscan cadastral data, full farms represented less than 30% in most of Carinthia, and in some areas, smallholdings absolutely predominated. In addition to large farms, there were also many smaller farms whose owners held hereditary rights. Peasants, for example, acquired such rights by clearing lower-quality forest land, thereby gaining property. The right to redeem such land was most often obtained in high-altitude areas. Moreover, peasants also expanded their holdings (by purchasing land) and sold them (Henig Mišičič et al., 2023, pp. 153–154).

A similar situation in Gornji Grad district is suggested by Aleksander Videčnik, who cites data from 1937, according to which there were 1,885 farms in the district of Gornji Grad, along with 701 smallholdings and 307 tenants. Videčnik points out that the latter were on the social margins. In an even worse position were the so-called *ofri*, who were obliged to be at the disposal of the master of the cottage in which they lived and had to work to pay their rent. Videčnik also mentions that there was only one master of the farm, while his siblings, as uncles and aunts, became *iberžniki*, that is, a labor force on the farm in exchange for food and shelter. He notes that this landless and unskilled population represented an important labor force for forestry and timber rafting, and in connection with them, he also mentions emigration, especially overseas (Videčnik, 1997, p. 96).

As we can see, the landholding structure in the district of Gornji Grad, much like in Carinthia, became considerably more fragmented than might be inferred solely from the principle of indivisibility. Nevertheless, this principle most likely persisted to a certain extent or maybe even as a general rule even at lower altitudes, as suggested by the family history of the Purnat–Miklavc family (see Figure 1). In this specific case, this practice was abandoned at the end of the interwar period:

Ivan Purnat from Bočna, Frančiška Potočnik from Nova Štifta, Franc Miklavc from Trnovec, and Ana Pečnik from Brdo were all born between 1850 and 1857. Ivan married Frančiška, and Franc married Ana. Ivan and Frančiška Purnat had four children: Frančiška, Marija, Jožefina, and Ivan Jr.; Franc and Ana Miklavc from Trnovec had three: Franc Jr., Jožef, and Jožefa. Jožef fell in love with Ježefina, and his brother Franc Jr. fell in love with Jožefina's sister Marija. Around 1910, Franc Jr. and Jožef Miklavc moved to the United States, and Jožefina and Marija followed them a few years later. Jožef and Jožefina married (most likely in the United States) and remained there until their deaths (Jožef did not inherit). Franc Jr., Marija, and their four-year-old daughter Marija returned to Slovenia around 1921, where, as the eldest son, Franc Jr. took over the farm. Ivan Purnat Jr. married Ivanka Krajnc from Kropa. The two also moved to America (it is unclear whether they married before or in the United States), where their son Johnny (Žani) was born. The family moved back to Slovenia in 1934 when Žani was 12. Ivan inherited the estate and fully renovated it upon returning home. The fourth sister, Frančiška Purnat, married Ivan (Janez) Žmavc and moved to the Žmavc household. They had 12 children, one stillborn and one, Jakec, who died

the same day he was born. Ten children were raised on the family farm: Ivan, Franc, Jože, Anton, Stanko, Rafael, Alojz, Feliks, Peter, and the only daughter, Pepca. Three of them, Pepca, Peter, and Franc, lost their lives during World War II. Jože moved to Ljubno to the Poberin house, Ivan to Vinkovci, while the other men remained in Bočna. Stanko took over the care of the Žmavc farm, Alojz married into the Zgornji Novšek house, Anton into the Orešnik house, Feliks founded a family at the Liks house, and Rafael at the Zakrajšek household (summarized from an interview with Tomaž Čretnik).

In the life story that begins with two couples, born in the mid-19th century, we can trace the inheritance method of passing on property to a single heir (the eldest son) up to the period between the two world wars. The inheritance principle was then interrupted, and the fifth-born son inherited the Žmavc farm.

LOGGING, RAFTING, AND SELLING TIMBER

Felling, hauling, and selling timber were undoubtedly among the most important elements of the integrated peasant (and non-peasant) economy in the former district of Gornji Grad, expanding methods and sources of income for both forest estate owners, merchants, and the lower social strata. Videčnik notes that in the Zadrečka Valley, the common saying between the two world wars was, "If there is no raft, there is no bread." The same author reports great interest in wood-related work among tenants, cottagers, and *iberžniki* (unmarried aunts and uncles living on the farm). This work, however, was arduous and mostly done manually, as many water sawmills were still simple Venetian mills, and the first steam sawmill in Nazarje only began operating at the turn of the 20th century. In the forests, individual trees were felled, or clear-cut areas were created, where the remaining branches and undergrowth were then burned. Workers involved in such clear-cutting were reportedly still claiming, even after World War II, the right to be assigned a plot of land there for sowing cereals, which thrived on such soil. Due to the lack of forest roads, the felled timber was transported down into the valley via earth, wooden, or water chutes, which was a difficult and dangerous task. The workers were organized under the leadership of a group leader (*rižmojster*), who negotiated the price for the contracted work and distributed the payment among the workers. The forest owner sold the timber on the stump to a timber merchant or sawmill owner, and the buyer was responsible for organizing the felling, hauling, and rafting of the timber. According to Videčnik, peasants not skilled in accounting were often deceived in this process. He cites folk stories about how people from the lowlands (Poljanci) defrauded the peasants from Luče, a village in the Upper Savinja Valley. He also notes that the same workers would typically fell the trees, haul them down the chutes to the valley, and then participate in the rafting. For this seasonal work, the group leader usually selected individuals he already knew and trusted (Videčnik, 1997, pp. 96–104).

Wood rafting on the Upper Savinja and Dreta rivers has been documented since the 15th century. Rafts were floated from Ljubno on the Savinja River and Bočna on the Dreta River. Sources from the 17th century indicate that rafts were rare, but by the middle of the 18th century, sources increasingly mention wood rafting. A letter from sawyers and raft masters from the Gornji Grad monastery to Bishop Herberstein in 1779 mentions that the raftsmen supplied all of Croatia and Slavonia up to the Turkish border with wood. It also notes that this trade allowed them to pay all their dues. Similarly, in 1796, the state government of Gornji Grad recorded that substantial sums of money flowed annually into the area through wood rafting on the Dreta and Savinja rivers, continuing to Croatia, Slavonia, and Srem. In the second half of the 19th century, the rafting routes extended all the way to the western Romanian town of Calafat and Černa Voda, near the mouth of the Danube into the Black Sea. As highlighted by Angelos Baš in his work on rafting in Slovenia, these were the longest working voyages for Slovenian peasants, cottagers, and land tenants at the time. Those who traveled to Romania were away for more than six weeks. On their way back, they used a steamboat for part of the journey, then traveled by train and on foot. Even those who only traveled to the areas between Slavonski Brod and Belgrade were absent from home for about two to three weeks (Baš, 2003, pp. 9–14).

Wood rafting was quite a profitable activity. In the early 20th century, 2,000 to 3,000 rafts traveled along the Savinja and Dreta rivers annually, with even more in the 1930s, when estimates and data for specific years show around 4,000 rafts per year. In the 1930s, a wood rafting master, who typically conducted four to five trips per year, could earn a net profit of around 33,600 to 52,500 dinars. Although the wood rafting master led the rafting operation, even less wealthy individuals could participate in wood rafting, thus supplementing their income. During the same period, the net earnings of a raftman (after subtracting the cost of a train ticket for the return journey) who was not a wood rafting master were about 90–100 dinars per trip to Celje. Raftmen traveling to Rugvica earned around 2,000–4,000 dinars annually, while those heading to locations between Slavonski Brod and Belgrade earned around 6,000–10,000 dinars per year (depending on the year, as earnings increased toward the end of the 1930s). Wood rafting masters covered the cost of food for these raftmen on longer trips and provided them with a train ticket for the return journey, making their actual earnings even higher (Baš, 2003, pp. 25–26). For comparison—according to the calculations of France Kresal, the average monthly wage in the mid-1930s was around 600 dinars, while the salary of civil servants was about 2,500 dinars per month (Kresal, 1995, p. 36). The average monthly wage of a servant in the Banovina, according to calculations by Filip Uratnik, was around 170 dinars. The *dninar* (hired agricultural laborer, paid daily) typically received food and around 13 dinars a day for their work (Uratnik, 1938, pp. 77–80). The earnings from wood rafting were, therefore, very good.

Franjo Baš, in his 1938 study named *Življenjski nivo kmeta* (The Standard of Living of Peasants), classified peasants, who were still the dominant category of the

population in Slovenia at the time, into two groups: the patriarchal type, living in remote areas with a lifestyle that was both materially and mentally below the level of the average Central European peasant, and the so-called bourgeois type of peasant, who, although engaged in agriculture, lived, dressed, housed, and thought in a bourgeois manner.

In diet, clothing, housing, and intellectual life, the bourgeois type of peasant lives in a bourgeois manner. Generally, coffee and beef are consumed, not only occasionally on Sundays but also during the week. Clothing is bourgeois, with a conservative cut, but still bourgeois. The dwelling is furnished with goods made by craftsmen and offers adequate supplies, including sufficient hygiene with water. Intellectual life is guided either by newspapers or by educational and economic organizations that mentally guide peasants. [...] The patriarchal type of peasant maintains continuity with the pre-feudal peasant in all aspects of his intellectual life, in food, clothing, and housing. He reads in the winter but not regularly as the bourgeois peasant does. The individual outlook on life is minimal [...], and he follows the examples set by his models, the church, or the landlord from whom he depends. Coffee has not yet become a regular breakfast in his diet, and breakfast consists of corn or potato soup. [...] The dwelling of the bourgeois peasant offers an average of one bed for each family member, while the patriarchal peasant's dwelling can accommodate two people in one bed. Similarly, housing spaces are fewer. While we can claim that the bourgeois peasant has separate living quarters for the master and mistress, as well as separate spaces for the male and female children once they grow up, the patriarchal peasant, especially in the case of the winegrower or woodcutter, has, in addition to the shared house, only two or even one room, so that, especially in the winter, when men sleep in the hay, the whole family sleeps in two or just one room. Overall, in contrast to the bourgeois peasant, the patriarchal peasant is insufficiently nourished and passive in his intellectual life (Baš, 1938, p. 121).

Baš linked his typology of peasants to the size of the farm, which either enabled or hindered modernization (above or below 5 hectares). In terms of location, Baš placed the bourgeois type of peasant in the vicinity of larger cities (particularly Ljubljana, Celje, and Maribor), in areas where industrial crops were grown (such as hops in the Savinja Valley), and in places where long-distance trade was developed (such as wood rafting in the Drava Valley or Upper Savinja Valley in Gornji Grad district).

As we can see, tree felling, timber hauling, and wood rafting represented a financially significant activity for various social strata—both for large forest owners and merchants, as well as for the peasant population, for whom wood-related work was an important element of the integrated peasant economy. The peasants described by Baš in the above passage are very likely the ones who managed to climb the social ladder precisely because of the timber trade. Wood rafting simultaneously gave the population a window to the outside world and normalized long absences from home.

In the Gornji Grad area, it ended during World War II, and it was not revived afterward. A cooperative wood rafting initiative was also unsuccessful (Baš, 2003, p. 16).

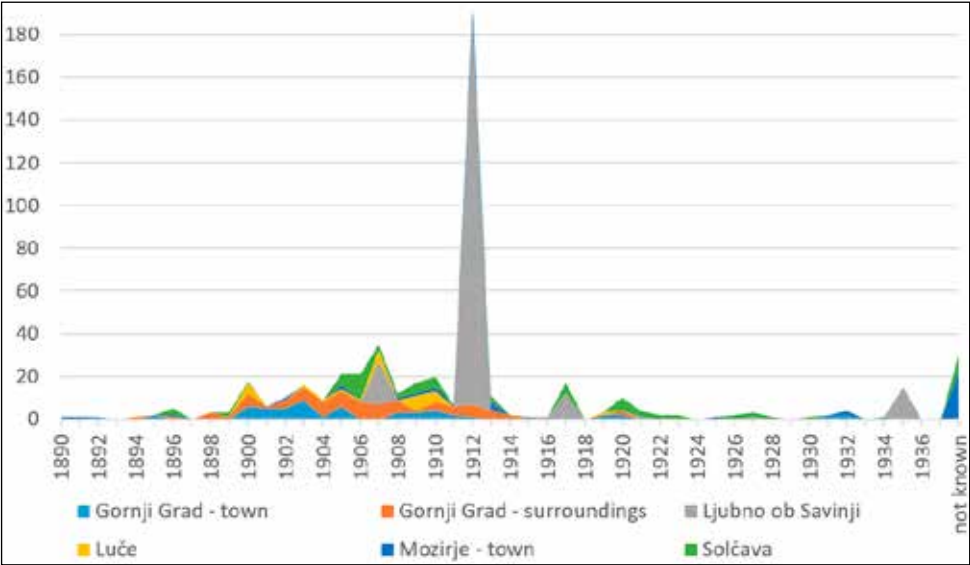
EMIGRATION

As Aleksej Kalc writes in the comprehensive collective work on migration in Slovenia, *Doba velikih migracij na Slovenskem* (Daring Dreams of the Future: Slovenian Mass Migrations 1870–1945), migration movements were most intense in areas where local agrarian resources were limited, such as in mountainous regions (Kalc et al., 2020). Based on the percentage of emigrants relative to the total population (calculated by the population data for 1931), the Gornji Grad district ranked ninth (out of 23) among the districts in the Banovina from 1880 to 1931. During this time, 9.5% of the population, based on the 1931 census, emigrated (Sedlaček, 2015, p. 59).

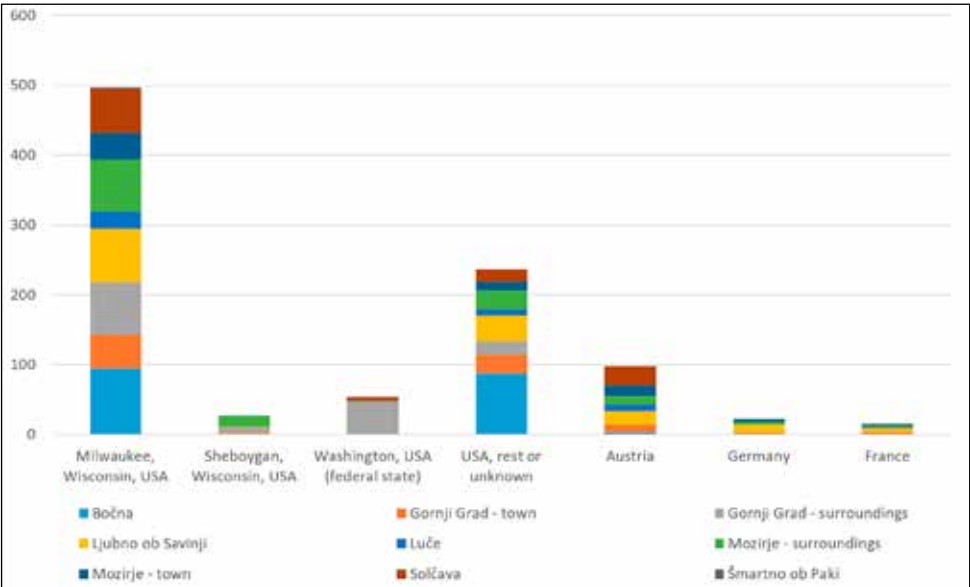
In 1931, all the municipalities in the Drava Banovina prepared lists of all known people who had emigrated from their territories between 1880 and 1931. The statistics included the emigrant's name and surname, date and year of birth, the exact address of their destination, year of emigration, occupation, whether the person was married, how many children they had, and whether they were in contact with their family through letters. There was also a space for other notes, which sometimes included information about whether the person had died abroad, and for women, the maiden surname was occasionally recorded. The quality and reliability of the statistics for individual municipalities vary, with some being more useful than others. However, they generally suffer from numerous shortcomings, including the fact that they were compiled retrospectively based on the recollections of local residents about their relatives and fellow villagers. Moreover, our field research showed that most of the ancestors of the people we interviewed were not listed in these statistics. Some sections were often left blank, and the census for the municipality of Rečica ob Savinji is entirely missing. Nevertheless, the statistical data at least provide a general insight into the trends of emigration and the destinations of emigrants from the Gornji Grad district.

Graph 1 shows the emigration trends from the Gornji Grad district. Different colors or shades represent the various municipalities of the district, as shown in the legend. It should be clarified that the municipalities of Bočna, Mozirje – surroundings, and Šmartno ob Paki are not included in the legend, as the year of emigration was not recorded at all for the first two municipalities, and the data for the municipality of Šmartno ob Paki are statistically insignificant since only two emigrants were recorded. It should also be explained that the peak in 1912 is not accurate because, in the municipality of Ljubno ob Savinji, the year of emigration was approximately assigned to the listed individuals in terms of "emigrated twenty years ago," so the peak in the graph should actually be spread across other nearby years. Despite all these reservations and shortcomings, the graphical representation still clearly shows the first decade and a half of the 20th century as the peak of emigration, which

then significantly slowed down after the start of World War I. This dynamic aligns with emigration trends reflected in Mulaček’s statistics for Carniola, which derived from official records (although also containing certain deficiencies) (Mulaček, 1913; Drnovšek, 1999).



Graph 1: Emigration from the Gornji Grad district by year and individual municipalities (AS 74, n.d.).



Graph 2: Emigration from the Gornji Grad district by destination and individual municipalities (AS 74, n.d.).

Graph 2 shows the most common emigration destinations, with the United States strongly leading, especially Milwaukee and Sheboygan in Wisconsin. From conversations with interviewees, the town of Little Falls in the state of New York also emerged as a frequent destination. Slovenians in Wisconsin were employed in various occupations, from farmers and livestock breeders to industrial workers.

Milwaukee, located on Lake Michigan, was Wisconsin's largest city at the time, with over 450,000 inhabitants. It was a major commercial center with a strong leather industry (in the late 1920s, it ranked second in the United States in leather production), as well as breweries and machinery, textile, footwear, and woodworking industries. The city also had steel mills, foundries, slaughterhouses, and tobacco factories. By the end of the 1920s, there were about 7,000 Slovenians in the city and 9,000 in the surrounding area. They worked in banks, stores, factories, and slaughterhouses. Many were craftsmen and merchants, but the largest group worked in the leather industry (Zavertnik, 1925, p. 528).



Figure 1: The Purnat Family in the United States, likely in the early 1930s (personal archive of Breda Kolenc).

Sheboygan was also located on Lake Michigan. By the end of the 1920s, it had over 31,000 inhabitants. The city had furniture factories, toy factories, machine shops, textile and shoemaking businesses, tanneries, and enamelware production facilities.

The surrounding farmers engaged in livestock farming and dairy production. There were fewer Slovenians here, around 2,600. The vast majority worked in factories. In addition, Slovenians in the city were wholesalers, butchers, tailors, and shoemakers. They also owned a stonemasonry workshop, a photography studio, and a painting studio. Some were involved in restoration work (Zavertnik, 1925, p. 533).

From this, we can infer that the emigrants' migration was both spatial and sectoral. Based on the interviewees' testimonies, it was clear that they had materially advanced in the United States. This is supported by statements such as "He must have earned quite well up there," "Oh, when he returned, he was quite a gentleman," "They must have done well," and so on. This is also evident in photographic material preserved by one of the interviewees, which shows that the equipment of relatives in the United States was considerably more modern than what was available at home at the same time.

MACRO PERSPECTIVE

To better evaluate what we have presented so far, we must take a step back and view the events from a macro perspective. During the period under consideration, broader processes of modernization, industrialization, urbanization, and restructuring in agriculture were unfolding across Europe and, with a delay, also in the Slovenian territory. A demographic transition accompanied these processes.

Žarko Lazarević (2017; 2018) places migrations at the turn of the 19th to the 20th century in the context of industrialization, urbanization, and rural overpopulation. He points out that the Slovenian territory before World War II was characterized by faster population growth than economic growth, which made rural overpopulation the leading driver of emigration. Emigration increased leading up to World War I. As Slovenia was lagging in modernization processes, industrialization only began to take shape in the 1880s when basic energy, transport, and financial infrastructures were established. Despite this, the number of new jobs was insufficient, which led to migration as a response to rural overpopulation in the last decades of the 19th century. These migrations had both spatial and sectoral relocation characteristics (from agriculture to non-agricultural sectors). Lazarević shows a correlation between rural overpopulation and emigration rates in four different regions, confirming the link between the two. He divides the background of migration into three periods. The first period, pre-World War I, was characterized by a traditional economy, a high agricultural overpopulation, and increasing emigration. In this period, emigration did not solve the problem of rural overpopulation but alleviated it to the extent that a slow restructuring in agriculture could begin. The second period spans the interwar period, a time of economic transition when agricultural overpopulation was lower. In the third period, post-World War II, accelerated industrialization made internal migration from the countryside to the cities significant.

Between the two world wars, rural overpopulation began to decrease, as did migration. However, until the beginning of World War II, the population grew faster than the economy. Rural overpopulation continued to limit the population's prospects and economic and social opportunities (Lazarević, 2018, p. 21–29; Lazarević, 2017). However, as Lazarević also points out, although an important background and cause of emigration, economic reasons are insufficient to explain migration comprehensively. Often, migration was a family or personal strategy to improve one's life.

MIGRATION AT THE CROSSROADS OF ENVIRONMENTAL AND SOCIAL CONSTRAINTS AND HUMAN AGENCY

As we have seen, the natural characteristics of the district—much of which lies at higher elevations and more than half of which was forested—contributed to nutritional insufficiency while simultaneously providing abundant timber resources and waterways suitable for log rafting. Timber harvesting and rafting served as important sources of income across all social strata and constituted a key component of an integrated peasant (and non-peasant) economy. Migration offered yet another means of overcoming this mountainous district's natural limitations, as well as an opportunity for higher earnings and potential upward social mobility. In this context, migration to the United States was particularly prominent. Data from our interviews suggest that marriage and inheritance customs may also have been significant push factors of permanent and long-term migration. As we have shown, despite land fragmentation, the indivisible inheritance principle appears to have continued to play a role in the Gornji Grad district even during the interwar period. Furthermore, available data indicate that the proportion of unmarried individuals of reproductive age in the district was higher than the Slovenian average and that those who did marry tended to do so at a later age.

When we asked our interviewees about the reasons for their ancestors' emigration, two main themes recurred: economic aspirations and love—often intertwined in stories of couples seeking to build a life together abroad. In many such cases, the man emigrated first, followed later by his partner; the couple would then marry once reunited overseas. Another interesting example that illustrates how marriage and inheritance customs acted as a push factor for migration is the story of Ančka from the village of Otok. According to the informant Manca Remic, Ančka left for the United States in 1923 at 19 and married a fellow countryman, Ciril from Rečica ob Savinji, with whom she was reportedly in love even before leaving for the United States. The informant, however, pointed out her status as an illegitimate daughter as a circumstance that might have been crucial in her decision to emigrate to the United States: "Why did she go to America? I don't know exactly why. She was an illegitimate child, which at the time was quite a stigma. But she was already in love with Ciril, who later became her husband" (Remic, 2022).

Sometimes, migration was part of a family strategy or simply an individual decision. What they could expect from emigrating to America is testified by the words of informant Peter Weiss (2022): “My great-grandmother was in America. She was a tavern keeper and had four sons. By 1935, one of the sons was already a dentist. In just one generation, they advanced that much. This was something that you couldn’t even imagine here, such a rapid leap on the social ladder.” The decision to migrate was often connected not only to the prospects of a better future but also to poverty and the lack of opportunities for a good life in the homeland, as evident from the story that Jožef Mlinar from Bočna shared with us about his ancestors: “Before World War I, my grandfather emigrated to the US due to poverty. He sold the farm, and his wife, my grandmother, returned to her parents. Their son, my father, came to Bočna as a farmhand. When he earned enough money, he emigrated to the US in 1912, and after 20 years, in 1932, he returned to Bočna, to the farm that his aunt had left him” (Mlinar, 2022). Migrations often had a profound impact on family structure, dividing families. This is also evident in the story that Bernarda Prodnik told us. Furthermore, this story suggests that the reason for immigration may have been the illegitimate children, who could have brought stigma, hardship, and likely also the parents’ desire to provide them with a better life:

My grandfather emigrated to Canada in 1926. My grandmother was then 26 years old and already had four children, one born out of wedlock. The three others were born close together. The children were very young; my mother was born in 1922, her sister in 1924, and her brother in 1926. The first out-of-wedlock daughter was just a little older than these children. He also had an out-of-wedlock son. [...] My grandmother found it very difficult at home. She resented him very much for leaving, although he sent money. (Prodnik, 2024)

However, we must emphasize that, based on the collected stories, we can only infer (and that too very limitedly) the role of migration between the two world wars. We cannot conclude much about its role in earlier periods when emigration was at its peak.

REMITTANCES

In this part of the article, we will present remittances from the emigration country to the home community, as we were able to document through interviews. Some of these remittances refer to post–World War II, and some relate to the period between the two world wars, which we will always indicate accordingly. We have categorized remittances into two types—financial and social remittances.

Financial remittances

From all the interviews we conducted, it was clear that emigrants abroad (mostly to the United States) significantly improved their financial situation, lived better, etc. We were also able to document several examples where these financial resources, in one way or another, in the time between the world wars, returned to the home district. The words of Breda Kolenc from Bočna testify, for example, to how the money earned in the United States came back to the old homeland and was used to renovate the family estate: "When my grandfather returned from America, the estate was abandoned. Then he renovated everything" (Kolenc, 2022). In the case of Bernarda Prodnik's grandfather, financial remittances regularly flowed into the home village. They were neither received as a lump sum upon the emigrant's return home nor was the financial assistance limited to the immediate family: "Grandfather always sent money home. Then, one day, because he had sent her the wrong letter, Grandmother realized that he was also sending money to others in the village. She was furious. She never forgave him" (Prodnik, 2024).

Especially interesting is Ana Vodušek's will from 1927 (personal archive of Jožef Mlinar), in which she bequeathed her estate with a house in the village of Bočna to her nephew Jožef Mlinar five years before her death. Jožef Mlinar had been a servant on the Žmavc estate in Bočna since he was ten years old. When he was 20, he decided to go to the United States to earn money and secure a better life. He went to Little Falls, New York. His love followed him, and they later married there. In 1932, he returned with his family to Bočna after learning that his late aunt had left him the estate. At that time, as a worker, he had greatly improved his financial situation; in the United States, he owned a house and a car (interview with Jožef Mlinar). Therefore, his aunt's will can be seen as a form of remittance, as it reflects the financial impact of emigration on the home community. According to the terms of the will, Jožef Mlinar had to make several payments, which he did with money earned in the United States. In the will, he was tasked with paying:

- Funeral expenses (clothing for the deceased, coffin, grave digging, ringing the bells, mass, and payment to the priest) totaling 5,791 dinars. Additionally, he had to pay for the wake—food, drink, and three waitresses totaling 5,000 dinars.
- 12,500 dinars to the church in Bočna.
- 12,500 dinars for masses and Way of the Cross.
- 7,500 dinars for the poor of the third order of the parish in Bočna.
- 1,250 dinars for the parish poor in Bočna.
- 1,250 dinars for poor schoolchildren.
- 2,500 dinars for the volunteer fire department in Bočna.
- 10,000 dinars for his underage children, Zofija (born 1917) and Jožef (born 1918), who lived with him in the United States.

- 10,000 dinars for his brother Anton, who also lived in Little Falls.
- 10,000 dinars for Anton Mlinar's children, Anton (born 1911) and Albin (born 1915), who lived with their father in the United States.
(Ana Vodušek's will, personal archive of Jožef Mlinar)

He had to make payments to 14 other people not related to him (including nine children from two different families). The total payments exceeded half of the estimated value of the inherited estate and reflected social responsibility (church, firefighters), charity (the poor and poor schoolchildren), and a sense of social justice (the heir had to pay 21 people in total, seven relatives and 14 people who were not related to him). From this will, we get a sense of how important financial remittances could have been for the entire community.

Social remittances

From the interviews, we also gathered evidence of some social remittances, which we divided into welfare/poverty criteria and social standard remittances, lifestyle remittances, material culture, clothing culture, and traces in local sayings and language. All of these remittances, except the first story and traces in local sayings and language, refer to the post–World War II period.

Welfare/poverty criteria, social standard

In 1934, after about 20 years of living in the United States, Ivan Purnat Jr. and Ivanka Krajnc returned to the village of Bočna with their 12-year-old son, Žani. The words of Ivan and Ivanka's granddaughter, Breda Kolenc, about the time when her grandfather Ivan Purnat Jr. and his family returned home testify to how life in the United States influenced the perceptions of what constitutes luxury, basic standards, and poverty: "When his father died, they told him that the estate would be abandoned if he didn't come back. So, he returned with his family. But his wife Ivanka didn't like it. She said, if I had known I would be coming back to this (and it was after the war), I would have stayed in America" (Kolenc, 2022). Breda Kolenc also spoke about the embarrassment her grandmother Ivanka felt when she received a visit from her sister Kristina, who had been living in America, in the 1950s: "Grandmother said she was a bit embarrassed when her sister Kristina came to visit around 1950—she said, 'Oh, let's fix up the façade so she doesn't think we're so poor here'" (Kolenc, 2022). Although Breda's grandmother Ivanka was aware of the differences in lifestyle between Bočna and the United States, the family still had a higher standard of living than the other villagers upon their return from America, as they had completely renovated the farm. In addition: "At our house, we had the first outdoor flushable toilet" (Kolenc, 2022).

Lifestyle

Breda Kolenc also recalled the different lifestyle of her family compared to that of the neighbors in the village: “We often had celebrations. Something was always happening. It seemed a bit American to me. I can’t remember celebrations like that anywhere else here. For all holidays, for March 8, for Mother’s Day, we had things happening at our house ... family, neighbors. Mom and Dad were very social. The neighbors were maybe a bit more reserved, but when they were invited, they all came” (Kolenc, 2022).

Material culture

Many emigrants sent packages home containing goods that the interviewees remembered as something special and luxurious. Manca Remic recalls that Aunt Ančka (whose mother, despite not being related to them, her parents took care of) sent things that seemed special to her: “She would send us gifts; I remember an elephant, a necklace, a watch, and a doll named Ančka—it all smelled so nice” (Remic, 2022). Breda Kolenc also recalls the treats and special items that relatives who remained in the United States sent to the family: “They used to send us such amazing packages. Rice chocolate was always in the package. [...] I remember they sent us popcorn. Then Dad Žani would pop it and season it with butter. [...] I loved dolls. They sent me such a nice doll, with a suitcase of clothes to dress her in” (Kolenc, 2022).

Especially remarkable is the story of the first radio in the village of Kraše, which, according to Peter Weiss’s account, was in his grandfather’s house. Since it came from the United States, it had to be slightly modified: “In Kraše, the first radio came from America, and they had to take it to the blacksmith to add a bulb, and it had to always be on because in America the voltage was 110V, while here it was 220V. They had to lower the voltage a bit.”

Clothing culture

Among the special status symbols were clothes from America: “They sent us beautiful American clothes. I know I was confirmed in an American dress—a short, silk dress. We even gave these beautiful clothes to the neighbor’s children. My mom was always wearing American clothes” (Kolenc, 2022).

Traces in local sayings and language

Linguist Peter Weiss described the appearance of the calling form of the Slovenian name Marija as “me:ra” and “m(i):ri” (i.e., Mary) in the village of Kraše—forms that originate from English and appear only in a reference to a resident of Kraše who was

born in California. The nickname (*A*)*merkanc*, “(a)mer’kB:nc” (an American), was used for those who had returned from the United States (Weiss, 1993, p. 79). Similarly, the first sawmills, which supposedly didn’t arrive in the Gornji Grad forests before 1911, were called *amerikanke* (“Americans”) because they were said to have been brought to the area by emigrants to Canada. (Videčnik, 1997, p. 106) Weiss, who was also one of our interviewees with a family experience of emigration, told us in the interview that “for the city of Milwaukee, which was a common destination for emigrants from the Gornji Grad area, the Slovenianized pronunciation of ‘Mil’va:ukε’ became established in the local dialect” (Weiss, 2022). The last example of these kind of remittances is particularly noteworthy. It concerns a saying that became established in the speech of Kraše after a story that has also been preserved in local tradition: “There was one family, the Grehčevi from Spodnje Kraše, who went to America twice, but then they returned. They acted a bit lofty. Once, when the mother was hoeing the field, she called her son to check the *potica* (pie) in the stove. In the middle of the week, when a *potica* is usually not baked, the son replied truthfully—‘I can’t check the pie, mom, because it’s not there’” (Weiss, 2022). And that’s how the saying among the people became ‘as good as Grehčev pie’—ironically speaking. The expression for ‘pie’ became established in the dialect as ‘pa:j’” (Weiss, 1993, p. 79).

As we have seen, financial remittances sometimes provided essential support to families. They contributed to the local economy, while social remittances influenced norms, values, and lifestyles, manifested in the material culture and clothing, bringing new ideas and practices and even leaving traces in language. These remittances reveal the emigrants’ enduring connection to their homeland and the multifaceted financial, socioeconomic, and cultural impacts migration had on the home community. In that way, migration both responded to and influenced local circumstances.

CONCLUSION

This study has explored how the inhabitants of the Alpine district of Gornji Grad actively responded to environmental constraints through a range of interconnected practices. Rather than being static or solely dictated by necessity, these practices were dynamic, adaptive strategies that reflected both the challenges of a mountainous environment and the creative agency of rural populations. Marriage and inheritance customs, while seemingly straightforward, reveal a complex interaction between adaptation to limited agricultural resources and social aspirations. These customs functioned as a kind of push–pull mechanism. While helping maintain viable holdings (at least for a specific time in history), they also generated pressures that spurred individuals to seek alternative livelihoods, including through seasonal work or migration. This tension gave rise to varied forms of economic and personal creativity—how to secure enough income on a smallholding, marry despite limited prospects, or integrate external opportunities into local life. Timber, as one of the

most important pillars of the integrated peasant economy in this area, provided a critical alternative source of income. Timber rafting and migration often functioned as complementary, though not simultaneous, strategies: one could not engage in both at once, yet involvement in timber work perhaps led individuals to consider migration as a next step. In this context, migration was both an alternative mechanism for income integration and a means of transcending local limitations. For some, it was a temporary strategy undertaken with the intention of returning home with accumulated resources; for others, it was a search for a new life, expanding income and opportunity beyond the boundaries of the local environment. Moreover, as the data we have presented suggest, migration was most likely linked to marriage and inheritance patterns, as individuals constrained by these customs sometimes sought new possibilities abroad. Emigration also had reciprocal effects on the home community through remittances—not only financial but also social. These transfers influenced social norms and even left traces in the local language.

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The research data is stored at the Institute of Contemporary History.

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Interview with Breda Kolenc, 19. 6. 2022, Bočna.

Interview with Jožef Mlinar, 7. 6. 2022, Bočna.

Interview with Manca Remic, 19. 6. 2022, Otok.

Interview with Peter Weiss, 19. 6. 2022, Otok.

Interview with Tomaž Čretnik, 5. 7. 2023, Bočna.

POVZETEK

DOLGOROČNE MIGRACIJE TER DENARNI IN SOCIALNI TRANSFERJI V ALPSKEM OKRAJU GORNJI GRAD: ODZIV PREBIVALCEV NA OKOLJSKE IN DRUŽBENE OMEJITVE

Janja Sedlaček, Marta Rendla

Avtorici v prispevku obravnavata dolgoročno izseljevanje iz alpskega okraja Gornji Grad med koncem 19. in začetkom 20. stoletja ter si zastavljata vprašanje, na kakšen način so na izseljevanje vplivale okoljske omejitve in družbene norme, zlasti zakonski in dedni običaji. Na podlagi koncepta integrirane kmečke ekonomije pokažeta na trud lokalnega prebivalstva, da bi s svojim usmerjenim delovanjem preseglo omejene naravne vire z integriranjem raznolikih virov dohodka, kot so delo v lesni dejavnosti, sezonsko delo in stalna selitev. Migracije so opredeljene kot strategija odziva na demografske in ekološke pritiske, pa tudi kot izraz usmerjenega delovanja z namenom izboljšanja socialno-ekonomskih razmer onkraj golega preživetja. Na podlagi študije primera, temelječe na arhivskem raziskovanju in intervjujih s potomci izseljencev, avtorici ponujata vpogled v kompleksen odnos med lokalnimi razmerami in globalno mobilnostjo. Pri tem posebno pozornost namenjata povratnim učinkom izseljevanja na domačo skupnost, s poudarkom na finančnih, socialnih in kulturnih transferjih. Slednji niso pomenili zgolj materialne podpore, temveč so tudi prispevali k socialnim spremembam ter vplivali na kmečka gospodarstva in njihove vsakdanje prakse, na vrednote in celo na lokalne narečne posebnosti, s čimer so preoblikovali tudi kulturno podobo okraja.

THE ALTRUISTIC AND REDISTRIBUTIVE EFFECTS OF EMIGRATION: LEGACIES AND BENEFICES IN ITALIAN SWITZERLAND (18TH–19TH CENTURY)

Borut Žerjal¹

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ABSTRACT

The Altruistic and Redistributive Effects of Emigration: Legacies and Benefices in Italian Switzerland (18th–19th Century)

The article looks at the effects of emigration through altruistic and redistributive uses of remittances sent and earnings brought back home by emigrants. Through case studies of altruistic and redistributive mechanisms, it explores the roles of family strategies and processes of commonization through the public administration of legacies and benefices, focusing on testamentary legacies and ecclesiastical benefices created by emigrants in their places of origin in Italian Switzerland during the 18th and 19th centuries.

KEYWORDS: effects of emigration, altruism, charity, philanthropy, family

IZVLEČEK

Altruistični in redistributivni učinki emigracije: Volila in beneficiji v italijanski Švici med 18. in 19. stoletjem

Avtor v prispevku obravnava učinke emigracije skozi altruistično in redistributivno uporabo remitenc, ki so jih emigranti pošiljali domov, ter zaslužkov, ki so jih prinašali domov. Na primerih altruističnih in redistributivnih mehanizmov raziskuje vlogo družinskih strategij in procesov podružabljanja z javnim upravljanjem volil in beneficijev. Pri tem se osredotoča na testamentarna volila in cerkvene beneficije, ki so jih emigranti ustanovili v svojih krajih izvora v italijanski Švici med 18. in 19. stoletjem.

KLJUČNE BESEDE: učinki emigracije, altruizem, dobrodelnost, filantropija, družina

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INTRODUCTION

Migration produced numerous effects in places of departure. The houses of return migrants, for example, can be considered one of the most visible uses of remittances sent and earnings brought back by emigrants. Additionally, often together with other family members, the emigrants invested in land, small luxury items, moneylending, and other outlets to provide financial security for themselves and their families, improving living conditions and possibly raising their social status. Along with these types of remittance uses—often described as “self-centered” because they directly serve the needs of oneself and one’s family—we can observe at least two other categories: entrepreneurial uses (investments in manufacturing, infrastructure projects like railroads, banking institutions) and altruistic and redistributive uses. The latter overlap to some extent with self-centered uses in that solidarity within the family often blends with one that serves the community. All of these overlapping remittance uses, in fact, were part of the personal and family strategies of emigrants in pursuit of the general welfare of their families and to ensure these gains for their children and future generations.¹

In this paper, I will present some of the mechanisms used by emigrants in the Alpine valleys of Italian Switzerland to pursue these ends through legacies, benefices, and donations. Moreover, I will try to demonstrate that these practices impacted the larger community. Ecclesiastical benefices founded by emigrants in their places of origin strengthened the pastoral care for the community as a whole and, as we shall see, enabled the local children to have access to basic education. A legacy bequeathed to the municipality in the 19th century allowed it to perform new civic functions. These effects can best be observed by looking at how legacies and benefices were managed in the decades and centuries after their creation. In the final part of the article, I will analyze a case that shows how communities were not just passive recipients of charity and philanthropy but often played an active role through their management.

1 A substantial body of literature addresses the topic of remittances and, more broadly, the impacts of emigration on countries and regions of origin. The following selection of works has been particularly influential in shaping my perspective on this subject. For insights into remittances and return migration from the migrants’ point of view, see King, 2000 and Harper & Harper, 2005. An anthropological approach is provided by Carling, 2018. For macro-level analyses of the effects on countries of origin, refer to Faini, 2007; Sori, 2009; and Fauri, 2015, pp. 96–109. Regarding the specific impacts of emigration in the Alpine region, see Head-König, 2009; and Lorenzetti, 2020.

MOTIVES FOR ALTRUISTIC AND REDISTRIBUTIVE PRACTICES

In contemporary migration studies, the issue of altruism in the effects of emigration gained attention with the emergence of the so-called New Economics of Labor Migrations (NELM) in the 1980s. Regarding the motivations for sending remittances, NELM shifted focus from the conditions of the emigrant's time abroad² to the broader context, including that of departure. For scholars of NELM, the "factors influencing international migration decisions also are likely to shape the outcomes of international migration and remittances, both in the host country and the region from which migrants come" (Taylor, 1999, p. 64), therefore bringing the migrant's family and its "calculated strategies" (Rosental, 1999, p. 117; Stark & Bloom, 1985, p. 175; Corti, 2009, p. 315; Freda, 2024) to the forefront of the analysis of migration, remittances, and returns.³ The effects of migration should, thus, be placed in a close relationship with the departure and migration project (*projet migratoire*; Rosental, 1999, p. 83), which is not only individual but, in fact, collective. It is often shared with other family members and a broader community, such as a neighborhood or a village.

Marcel Mauss's foundational work, *The Gift: Forms and Functions of Exchange in Archaic Societies*, demonstrated that gift-giving, far from being purely altruistic, is embedded in networks of reciprocity and obligation that structure social life (Mauss, 2002 [1925]). This insight challenges the ideal of the wholly "disinterested" gift, as expressed by Philippe Sassier, who, in his analysis of the history of poverty in the early modern and contemporary period, defined it as "*l'acte gratuit, désintéressé, transcendant l'ordre terrestre de la nécessité*" (Sassier, 1990, p. 9).⁴ In the present analysis, I adopt a more grounded perspective, treating altruism and redistribution as actions oriented toward the welfare of family or community members—whether within the village, municipality, or broader regional context.⁵ These acts, which appear in the sources and scholarly literature under categories such as solidarity, charity, and philanthropy, often reflect the intentions and interests of benefactors

2 Viewing, therefore, factors such as earnings and length of stay abroad, economic and political constraints of transferring money, and willingness and possibility of return (Russell, 1986, p. 679).

3 Paul-André Rosental uses the broader term of the migrant's "reference group," which is, in most cases, taken to mean the migrant's family.

4 "The gratuitous, selfless act that transcends the earthly order of necessity."

5 In concrete terms, these acts can take place in favor of a public institution, an association, or any other public entity. Additionally, as I will show below, in most cases, these acts were addressed to the tight-knit community of the village assembly of landowners (*vicinanza*) or the parish.

themselves (cf. Cavallo, 1995, p. 256), thus aligning more closely with Mauss's interpretation of the gift as a socially embedded practice.⁶

What were these needs and desires? According to Angelo Torre (2017, p. 160), the historiography on charity in the early modern age has identified its three principal aims: devotion, prestige, and family strategies (cf. Schnyder, 2011, p. 168). In his study on devotion in Piedmont of the *Ancien Régime* (Torre, 1995, p. 86), he stressed charity's community function (*funzione comunitaria*). On the one hand, this can be observed in the charity practices carried out by collective entities, such as confraternities, which, in effect, constitute the community but also legitimize and sanction internal divisions within villages. On the other hand, an act of charity carried out by an individual (or even by several members of the same family), for example, in the case of ecclesiastical benefices, "*era funzionale ad esprimere 'pubblicamente' l'esito del processo di selezione dell'erede e di trasmissione del patrimonio familiare*"⁷ as well as guaranteeing tax immunity for the capital given in benefice. In this sense, a testament has to be seen as a response to tensions—both internal, among different heirs (actual or potential), and external, related to the community's recognition of the chosen heir as legitimate (Torre, 2017, pp. 159–160, 163).

By leaving a testament, one can, at least in the ideal sense, "*condizionare dall'al di là i comportamenti dell'al di qua*,"⁸ as Mauro Carboni put it, emphasizing the complex bond between benefactor and benefice.⁹ In the case of early modern age ecclesiastical benefices in Italian municipalities, he defined this bond as "*un patto sociale e un 'patto per l'eternità' dove la carità cristiana e il forte senso di appartenenza alla civitas erano associati, e per certi versi piegati, al rispetto della volontà del testatore e alla traditio memoriae individuale e/o familiare*" (Carboni, 2019, pp. 659, 681).¹⁰ Torre similarly distinguished between the more individual side of charity, emphasizing piety and devotion (cf. Adamoli, 2015, p. 14), and the more social side, which is focused on pursuing prestige and conquering privilege as part of the family strategy. Historians of 19th- and 20th-century philanthropy have arrived at similar conclusions.

6 According to Mauro Carboni (2019, p. 658), referring to 18th-century Bologna, "*il dono non era gratuito ma sottendeva uno scambio ed una reciprocità, sia pure asimmetrici: da una parte determinava un legame di patronage fra le parti, dall'altra generava l'attesa di una ricompensa sovranaturale ad una elargizione materiale*" ("The gift was not free but implied an exchange and reciprocity, albeit asymmetrical: on the one hand, it established a bond of patronage between the parties, and on the other, it generated the expectation of a supernatural reward for a material gift.")

7 "It was instrumental in expressing 'publicly' the outcome of the process of selection of the heir and transmission of the family patrimony."

8 "To condition from the hereafter the behaviors of the here."

9 Cf. David & Tournès (2014, p. 7) who reiterated the interdependence of the relationship between the donor and the recipient, whereby the recipient also contributes to the elaboration of the gift process, which then imparts the donor as the recipient.

10 "A social pact and a 'pact for eternity' where Christian charity and a strong sense of belonging to the civitas were associated, and in some ways bent to the testator's wants and individual and/or family *traditio memoriae*."

Christian Topolov considered philanthropy “as an investment proper to the wealthy classes,” which must bring benefactors benefits “private or public, direct or indirect, in the field in which one has invested or in another” (Topolov, 2019b, pp. 9–10). Furthermore, philanthropy was and is seen as a means of acquiring respectability and notability, prerequisites for gaining social status and a political role in society (Adam, 2004; David et al., 2006, p. 23; Topolov, 2019a, pp. 470–471).

In the case of emigrants, however, we need to investigate not only the choice of investing money in charity or philanthropy at the expense of other potential outlets but also where they decide to invest it. Indeed, it is precisely in the case of legacies and donations by emigrants in their homelands that we can observe their continued attachment to home both on a material and immaterial level.¹¹ As suggested (cf. Fauri, 2015, p. 99; Lorenzetti, 2020, pp. 129–130), emigrants often preferred entrepreneurial investments in their places of arrival, especially before the second half of the 19th century. In contrast, in their places of departure, they usually preferred more conservative investments, guaranteeing a stable income, such as land purchase and informal moneylending. Investments in legacies, benefices, and other acts of charity were also typically tied to their places of departure.

MECHANISMS OF ALTRUISM AND REDISTRIBUTION

The contribution of emigrants to charity and philanthropy in early modern and 19th-century Ticino was significant. In the mid-19th century, between 1839 and 1886, the cantonal government held a precise registry of all the legacies and donations created or donated in the canton.¹² From the 514 people listed in the register as benefactors, it was possible to identify 24 as those who experienced migration.¹³ Comparing the value of the contributions made by these emigrant benefactors with the total, we see that these 24 alone were responsible for approximately 20% of the total value of legacies and donations—a certainly underestimated percentage

11 The uses of earnings obtained abroad in an altruistic and redistributive sense have remained relatively unexplored in the field of contemporary emigration. A mention can be found in Rapoport & Docquier (2006, p. 1177) who noted the inequality and growth by pointing out that the “growth effects of remittances cannot be dissociated from their distributive effects.” In addition, several authors have cited so-called *hometown associations*, i.e., associations created by emigrants to contribute to the development of their place of origin (cf. Bonciani, 2018, p. 26). The topic has also remained in the margins in the field of historical emigrations (cf. Allegri, 1993, p. 182; Lorenzetti, 2017, p. 167), although it is more pronounced in locally focused studies, such as those on emigration in Ticino (cf. Ceschi, 1996, pp. 19–20; Adamoli, 2015, pp. 221–225). Additionally, in Lorenzetti (2020, pp. 124–128), we find an analysis of the importance of family solidarity in the allocation of remittances.

12 ASTi, *Dipartimento dell'interno – registri*, register 21, *Registro dei legati e delle donazioni*.

13 Based on a cross-reference of register data with other sources on Ticino emigration. The result obtained underestimates the number of people with migration experience, especially considering the strong presence of migration in 19th-century Ticino.

that leaves no doubt on the importance of emigration as the origin of redistributive effects. Moreover, this data underpins the importance of charity and philanthropy as investment options for the “migrations of success,” i.e., for emigrants who returned home with prominent financial means at their disposal. The archival data does not allow for a large-scale analysis of their investment strategies. Still, the literature on the 19th–20th-century Ticino economy suggests a lack of large investments in industrial or entrepreneurial activities (cf. Viscontini, 2005, p. 519; Lorenzetti, 2010, pp. 95–96). This indicates that research on the effects of emigration in Ticino should prioritize the examination of altruistic and redistributive practices.

To understand their effects, we must first understand the benefactors’ motives and the mechanisms they employed to achieve them. Starting with the family strategies as the motive for charitable practices, I will turn my attention to the ecclesiastical benefices or chaplaincies as a mechanism of altruism. They offer a fertile view into the mechanisms of family solidarity due to their dual public–private nature. An ecclesiastical benefice or chaplaincy refers to an office that provides the chaplain with specific obligations and benefits.¹⁴ Obligations included mainly the celebration of a certain number of masses per week; in Italian Switzerland, it was common to find benefices that included the obligation of the chaplain to school the parish’s children (Cappelli, 1997). The chaplain typically received an annuity for this office based on the capital bequeathed by the benefactor and occasionally housing and similar benefits. Finally, the benefactor reserved the right to choose the recipient of the benefice and to determine to whom this right of patronage—or *jus patronato*—would pass after their death. The chaplaincy has thus elements of both public and private foundations. On the one hand, it is subject to episcopal authority and is often tied to a publicly owned church (as opposed to a private oratory). On the other hand, the right of patronage ensures the descendants of the benefactor preserve a continuous link over time with the benefice and, in addition, control over the distribution of its benefits.¹⁵ As we will see, in the case of a lack of heirs, the right of patronage could also be passed on to a public entity (a *vicinanza* or a municipality). This was typical among all benefactors in Italian Switzerland. However, migrant benefactors represent an interesting case, as their decision to fund a benefice in their place of origin instead of their place of arrival is indicative of their relation to the homeland.

14 On the ecclesiastical benefice see Greco (1986, pp. 534–540), who defined them as “all those sacred offices held individually by clerics” who receive an annuity. Such a benefice involves “the intervention of a power within the ecclesiastical hierarchy and a presumable perpetuity of the office itself.” Moreover, by its very nature, the ecclesiastical benefice includes a patronage (*jus patronato*), i.e., the right to choose the recipient of the office, who then by rule had to be formally invested by an ecclesiastical authority.

15 See also Torre (2017) who, comparing the terms benefice (*beneficio*), legacy (*lascito*), and pious cause (*causa pia*) in their usage in early modern Italy from a sociological perspective, finds that bequests and benefices belong to the category of pious causes and highlights their connection to the process of legitimizing inheritance.

To examine the mechanisms of altruism and redistribution, I will start with the case of a network of merchant families from the upper Vallemaggia (with the lateral valleys of Campo and Lavizzara) in Ticino who, through *compagnie* (merchant companies) established throughout the Holy Roman Empire (Germany, Austria, Hungary) and in Holland, were involved in trade on a European scale between the 17th and 19th centuries.¹⁶ The lively mercantile activity extending throughout Europe did not result in the traveling merchants severing ties with their valley of origin. Instead, these ties were regenerated and consolidated by holding public offices and charitable practices in the villages of origin.

The link between the entrepreneurial activity abroad and the redistributive deeds taken up at home is visible when Maggia Valley merchants offered donations to their municipalities not as individuals but in the name of their *compagnia*. We can find this example in a 1741 agreement between the company Signori Pfiffer, Berna, Bell e Compagni and the clockmaker Giacomo Filippo Framino of Menzimonio in Vallemaggia for the construction of a clock tower for the parish church of SS. Fabiano and Sebastiano of Prato and Sornico (known also as SS. Sebastiano and Rocco).¹⁷ Besides donations, merchants would also act on behalf of the municipality through their company, like when the company Miniami, Pfiffer e Compagni appeared in 1773 as the representative of the municipality of Prato in a loan agreement with the municipality of Vira Riviera di Gambarogno.¹⁸

Turning now to redistributive mechanisms of family strategies, I will examine two benefices founded in the church of SS. Sebastiano and Rocco in Prato on the same day (April 5) in 1762,¹⁹ one by the Berna brothers and one by Carlo Antonio Guidini, members of two prominent families in the Lavizzara Valley merchant group.

The Berna benefice was founded by brothers Davide Antonio and Francesco Giuseppe Berna, merchants in Mainz (Germany), fulfilling the last wishes of their father, Giovanni Berna.²⁰ The Berna brothers bequeathed the benefice with the capital of 15,000 Milanese pounds left for that purpose by their father, to which, however,

16 These families were the Pfiffer, Berna, Gagliardi, Mignami, Grossi, Tamba, Cotti, and Spagnoli in the Lavizzara Valley (Prato Sornico, Peccia, and Broglio), the Lotti and Balli families of Bignasco and Caveragno, and, finally, the Pedrazzini family with its patronage network in Campo Vallemaggia. An overview can be found in Varini (2019) and Pometta (1987). On Pedrazzini, see Chiesi Ermotti (2019) and on the Balli, see Broillet (2005), and several contributions by Christian Balli (1987; 2012; 2018).

17 *"Una torretta della Chiesa de SS.ti Fabiano et Sebastiano di Prato, cioè che batti le ore in dodici senza ribattere, et che il suo corso sia almeno di ventiquattro ore [con] quattro mostre sia sfere nelle quattro parte di detta torretta"* ("A tower of the Church of SS. Fabiano et Sebastiano in Prato, which strikes the hours twelve times without repeating, and whose course is at least twenty-four hours [with] four displays, namely spheres in the four parts of the tower") (ASTi, Fondo Gagliardi, box 10, J51, September 27, 1741).

18 ASTi, Fondo Gagliardi, box 11, K30, February 25, 1773.

19 This can be explained by the role played in the formation of the two benefices by Giovanni Giulio Gerolamo Berna.

20 ADL, Prato Sornico, box 3, *Atto di fondazione del Beneficio Berna*, April 5, 1762 (notarized copy, 1867). Cf. Varini (2019, p. 273, note 107) and ASTi, Fondo Gagliardi, box 11, K18, February 1, 1763.

they added other donations in the following years. The benefice entailed a celebration of two masses per week, one in Prato and the other in an oratory of S. Carlo (Pradée). The right of patronage of the benefice was, by the founding act, reserved in perpetuity for the male descendants of the two founders. Still, the character of family solidarity is even more evident from the fact that the benefice, with its obligations and life annuity, was conferred on the third brother, Don Giovanni Giulio Gerolamo Berna, "canon, archpriest and *commissario apostolico* in Locarno, *vicar forane* of the Lavizzara Valley."²¹ In the following years, Giovanni Giulio Gerolamo enriched the benefice donations and testamentary bequests, of which the most meaningful was his library, to be opened for the use of priests, canons, and other clerics of the valley, thus creating one of the first public libraries in Italian Switzerland for which he also created strict rules of use.²²

Several elements of early modern charity practices can be glimpsed in this operation: the two brothers living abroad, following a plan already prepared by their father, managed with the foundation of the benefice to ensure financial support for the third brother and to strengthen the family's presence in Prato and Locarno, where Giovanni Giulio Gerolamo was based. Moreover, they gave rise to the family's prestige and provided for the care of their souls, which is not an insignificant aspect of that era. Finally, the ecclesiastical benefice guaranteed that the capital allocated for this purpose would not be dispersed.

The other benefice was founded by Carlo Antonio Guidini, a "fortunate emigrant from Prato" (Varini, 2019, p. 255),²³ probably a merchant of iron and associated with the Berna family. The benefice, endowed with 29,000 Milanese pounds, entailed the chaplain's obligation to celebrate mass and provide schooling for the children of Prato. For the passage of the right of patronage after his death, Guidini, 67 years old and childless at the time of the foundation, foresaw three consecutive possibilities. The right was intended, in the first place, for his own direct (male) descendants. In case he would die without children, legitimate or otherwise, as actually happened, the right was to pass to his cousin, living in Lorraine in France, and the cousin's descendants. In this case, he set a condition for them to return and settle in the "fatherland." For one reason or another, the right of patronage was not taken over by the relatives in France; thus, according to the third scenario, it passed to the

21 ADL, Prato Sornico, box 3, *Notizie del Beneficio Canonico di Casa Berna in Prato*, 1832.

22 "Una Biblioteca permanente di libri ad uso Ecclesiastico per la comodità e l'utilità dei Reverendni Signori Parroci, Canonici, Sacerdoti ed altri Chierici appartenenti alla Congregazione della della Velle [...] ho deciso e stabilito di destinarla al loro pubblico uso e consulta" ("A permanent library of books for ecclesiastical use for the convenience and benefit of the Reverend Parish Priests, Canons, Priests, and other Clerics belonging to the Congregation of the Valley [...] I have decided and established that it be designated for their public use and consultation") (ASTi, Fondo Gagliardi, box 11, K44b, *12 regole o condizioni per l'uso della biblioteca*, January 1, 1784).

23 Guidini appears in the 1755 tax roll of the municipality of Prato (ASTi, Fondo Gagliardi, box 11, K4, March 17, 1755) with the obligation to pay 6 ½ *denari*, which puts him among the richest taxpayers.

Comunità e uomini di Prato (community and men of Prato). So, the municipality was conferred the right of patronage after Guidini died in 1774.²⁴

The lack of children probably limited Guidini's ambitions since, in addition to the benefice, he had built an oratory dedicated to the Holy Crucifix in the locality of Vedlà south of Prato, where he also owned land.²⁵ The two projects—benefice and oratory—were connected, as can be seen in the provision that the chaplain of the benefice had to celebrate mass once a week in the oratory, in addition to the other masses to be celebrated in the parish church in Prato. From this, we can deduce the existence of a project focused on prestige and rootedness in his native territory, which, however, eventually took a more communitarian turn because the administration of the benefice by the municipality allowed access to the chaplaincy by clerical members of other families in the valley (particularly Gagliardi and Berna) and therefore, in a way, ended up more in the service of these families.

As noted, the two benefices also included an obligation to teach children. Guidini, for example, obligated the chaplain to keep the school open to all the boys from the municipalities of Prato and Sornico for eight months every year, from September to April.²⁶ The obligation of schooling was relatively common for benefices in Italian Switzerland. It has been observed that so-called school chaplaincies (*cappellanie scolastiche*) played a leading role in the education of children in Italian Switzerland villages before the appearance of the modern school system and contributed to a relatively high level of literacy, evidenced by the large volume of letters written by emigrants back home. In the newly created Canton of Ticino, schooling became officially obligatory in 1804. However, it was only in the 1830s and 1840s that the public school system began to emerge. Before that, outside the urban centers, the only schools for elementary education were those run by parish priests and chaplains. They were usually remunerated by the village assembly or through a chaplaincy (Cappelli, 1997, pp. 63–140; Marcacci, 2015). Even though until the mid-19th century, donations or legacies were never created primarily to finance schooling, private and community schools played an essential role in the continuation of emigration and

24 ADL, *Prato Sornico*, box 3, *Atto di fondazione del Beneficio Guidini*, April 5, 1762. Cf. Varini (2019, pp. 286–287) and Cappelli & Manzoni (1997, p. 395). Cf. Pometta (1987, pp. 186–188) who dated its founding in 1745.

25 ADL, *Prato Sornico*, box 3, *Inventario della paramenta et altro, che si ritrova nell'oratorio di Carlo Antonio Guidini Vedlà*, 1761. See also an excerpt from his testament in ADL, *Prato Sornico*, box 3, *Notizie del Beneficio ... Guidini*, 1832.

26 "[...] tenere scuola per otto mesi di ciascun anno a tutti li figli maschi concorrenti del Commune di Prato, e di Sornico, [da settembre a aprile] [...] dovrà farsi gratis [...] salvo un piccol pezzo di legna per cadaun scolaro ogni giorno da portarsi alla scuola" ("[...] to hold school for eight months of each year for all male children of the Municipality of Prato, and of Sornico, [from September to April] [...] free of charge [...] except for a small piece of wood for each pupil to bring to school every day") (ADL, *Prato Sornico*, box 3, *Atto di fondazione del Beneficio Guidini*, April 5, 1762). In an amendment, three years after the foundation, Guidini arranged for a reduction of the school to only six months per year and reduced the teaching to only reading and writing in Italian ("di solo insegnare e leggere e scrivere volgare"). The children were now also exempt from having to bring wood (ADL, *Prato Sornico*, box 3, *Notizie del Beneficio ... Guidini*, 1832).

the economic benefits the families and communities derived from it. In the *economia dell'assenza* (economy of absence) (Merzario, 2000, p. 32) in Italian Switzerland, basic education was crucial for the survival of the economic system as it enabled people to acquire a skilled trade or, as in the case of Lavizzara families, to engage in commercial activity abroad. School chaplaincies, dating from the 16th through the 19th century, were present throughout much of Italian Switzerland. In Lavizzara alone, in addition to the Guidini benefice in Prato, we find schools in Fusio—where, in 1708, the village curate was obligated to teach—and in Peccia, where a similar obligation was recorded in 1714. In Caveragno, the school for boys could operate without tuition, thanks to the benefice founded by another emigrant, this time one to Hungary, Giacomo La Marca (Cappelli & Manzoni, 1997, pp. 386, 394, 382).

ADMINISTRATION OF LEGACIES AND BENEFICES

In the previous chapters, I presented some characteristics and common threads of emigration's altruistic and redistributive effects that ran through the cases under examination. In this section, I want instead to examine what happened when the legacy administration was entrusted to a public entity. Even though, as discussed earlier, legacies represent an extension of a testator's will that continues after their death, their decisions were unavoidably subject to the interests of those entrusted with the management of the legacy. On the other hand, they often faced the unenviable task of staying true to the legacy's dispositions through changing circumstances and times. When the contradiction between the original will and the necessities of time became too strong, the interests of the living prevailed. Therefore, personal and family strategies employed in creating a legacy had an impact only as long as the legacy continued to be managed by the family. When, instead, the legacy was in the hands of a collective body, such as a village assembly (*vicinanza*), they gave way to more communitarian interests and goals.

This was the case of the Tondü legacy in Lionza in the Centovalli Valley. The Tondü family was established in the Duchy of Parma in trade, textile industry, and banking as early as the 17th century ("I Tondü di Centovalli", 1904, pp. 200–201). Over time, their ties with Lionza faded away.²⁷ In 1784, a descendant of the family, Sir Ferdinando Tondü "di Parma," donated all the remaining Tondü estate in Lionza and the surrounding Centovalli to the village assembly of landowners (*pubblico*) under the condition that the revenues of the estate be used to annually celebrate in the parish church a mass in suffrage for the family's deceased members.²⁸ The legacy's estate

27 Several traces of these ties remain, such as a palace built in 1653 and several edifices built by the family for the use of the parish (a chaplain's house, a sacristy, and a chapel) (Fiscalini, 1998, p. 3 et passim).

28 A copy of the founding act is preserved in Archivio Tondü (kept by the Fondazione Tondü in Lionza). See also the transcript in Fiscalini (1998, p. 30).

was comprised of 212 real estate properties, according to an inventory from 1842. They included a mansion (called *Palazzo* or *Palazz*), the chaplain's house, several other houses in the village, and scattered pieces of arable land in the village's territory.²⁹ The registers of proceeds and expenditures (*Registri dei ricavi e delle spese*)³⁰, kept between 1843 and 1954, reveal how the designation of the village assembly of landowners as the donation recipient gave rise to unprecedented developments. We find that in the mid-19th century, the administrators of the legacy, i.e., the landowners in Lionza (*patrizi*), still allocated most of the proceeds for the parish church to celebrate mass, as stipulated in the deed of donation. Shortly after, however, they opted for another use of this legacy. Beginning in 1858 and for about two decades, they used most of the annual revenues for the purchase of salt to be distributed among the villagers,³¹ leaving the priest with only a few pennies. In the 1880s and 1890s, the money used for salt was redirected to several investments in the decoration of the parish church, most notably the purchase of new bells. In the 1890s, the villagers decided to also substantially lower the rents for the legacy's real estate. This came to light in 1896 when the lack of payments for the masses prompted an intervention by the Diocese of Lugano, which demanded that the administrators observe Tondü's wishes. Among the Diocese's admonitions, we find that in 1893, the legacy's administrators reduced the total rents owed to the legacy by one-third. This was probably an important contribution to the community as records suggest that most tenants were themselves its members. Additionally, the Diocese expressed concern over expenditures it considered excessive—such as maintenance work on the estate—or inconsistent with the legacy's original purpose, including the restoration of a public stairway and the purchase of new church bells. In response, the “illegitimate” expenses, however, were reduced without increasing those for mass, as pointed out by the Diocese. To recapitulate, the ecclesiastical legacy, which in principle involved only the celebration of mass and thus can be considered to be intended primarily for the care of the donor's soul, played an essential role for the people of Lionza over time, though more by their decision than by the will of the legator.

Returning to the case of the benefice founded in 1762 by Carlo Antonio Guidini of Prato, we find instead an administration that tried to remain faithful to the wishes of the benefactors but found itself in a series of difficulties trying to navigate between opposing family interests and financial problems. On the one hand, the Guidini benefice addressed the community of Prato as a whole through the celebration of masses in the parish church and the education of the village's children. On the other hand, it directly benefited the more limited circle of Prato's merchant families since the beneficiaries were chosen among their members. This, in turn,

29 The inventory unfortunately does not include an estimation of the properties (inventory is preserved in the Archivio Tondü).

30 Preserved in the Archivio Tondü.

31 Therefore, effectively transforming this into a salt legacy (*legato di sale*) (cf. Chiesi Ermotti, 2019, pp. 172–173).

led to conflicts among them as to whose son with an ecclesiastical career would be the recipient of the benefice. So, in 1783, after the death of the until-then beneficiary, Giovanni Antonio Gagliardi, the involved families quarreled over appointing a successor. As mentioned, the right of patronage belonged to the municipality of Prato, which first granted the post to another member of the Gagliardi family. This immediately prompted a protest by canon and archpriest Gian Giulio Girolamo Berna, the beneficiary of his family benefice, who demanded this post for his great-nephew, Enrico Giuseppe, invoking a principle of rotation among Prato's merchant families. The newly appointed Benedetto Gagliardi then, in fact, renounced his post in favor of the Berna candidate. Indeed, as he passed away shortly after, there were no more impediments, and Enrico Giuseppe Berna received the benefice.³² A few decades later, other problems of a financial nature emerged. In 1820, the municipality of Prato felt forced to ask their bishop to convert the benefice into a simple legacy that would partly finance a school and partly be used for masses but would not require a resident chaplain. They argued that finding anyone willing to take the post had become impossible because of the benefice's low pay and poor conditions.³³ Even if, unlike in the case of the Tondü family, all the formal conditions of the Guidini's benefice were respected by its administrators, it still seems that a process of commonization of the private took place. Guidini's project was centered on creating a personal and family legacy to be inherited, if not by his descendants then by his relatives, as we have seen in the foundation act. Instead, it turned into a sort of public, if not common, asset, which other Prato families fought over.

CONCLUSION

The examined cases suggest the importance of altruistic and redistributive practices among the effects of emigration. They allow us to observe the family-centered and, in some cases, community-centered strategies that emigrants from Italian Switzerland employed at home. Ecclesiastical benefices and legacies could protect family interests through time after the benefactor's death. This, however, presupposed the continuation of the patriarchal succession and the continuous presence of the family in the place where the charity was performed. When this did not occur—as in the cases of the Tondü legacy and of Guidini benefice—the benefits of altruism went to the community, which could take the form of the municipality or a cluster of merchant families.

32 ASTi, *Fondo Gagliardi*, box 11, K43-44a, February 13–October 16, 1783. Then, in 1792, we find as the *possessore del beneficio* Luigi d'Orelli, accused by the representatives of the municipality of Prato of having celebrated mass in the neighboring municipality of Sornico (ASTi, *Fondo Gagliardi*, box 11, K60, February 24 and March 21, 1792).

33 ASTi, *Fondo Gagliardi*, box 13, M67, s.d. [1820].

Furthermore, we have seen how the effects of charity can be fully grasped only by examining how a legacy or a benefice is managed after the founder's death. After a benefactor's death, legacies and benefices begin a life of their own that must respond to the needs, wants, and aspirations of the living; they are forced to adapt to new circumstances of a financial and political nature. Therefore, as Torre and Carboni have reiterated, even if the testator can attempt to determine the future after their death, there is no guarantee of success.

Finally, the role of charitable and philanthropic practices as effects of emigration warrants further research, which should examine their role in the social and economic dynamics in the places of origin. It remains to be seen how these effects of migration compare to the other impacts, such as entrepreneurial investments, in terms of scale, dynamism, and the ability to affect the regional society's and economy's development.

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ABBREVIATIONS

ASTi – Archivio di Stato del Cantone Ticino, Bellinzona

ADL – Archivio diocesano di Lugano

ASL – Archivio storico di Lugano

ACA – Archivio comunale di Acquarossa

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POVZETEK

ALTRUIISTIČNI IN REDISTRIBUTIVNI UČINKI EMIGRACIJE: VOLILA IN BENEFICIJI V ITALIJANSKI ŠVICI MED 18. IN 19. STOLETJEM

Borut Žerjal

Altruistični in redistributivni učinki emigracije so razvidni v mehanizmih dobrodelnosti in filantropije, ki so se jih emigranti posluževali v svojih krajih izvora. S tem so pomembno vplivali na lokalno družbo, čeprav so bili motivi dobrotnikov pogosto povezani z osebnimi in družinskimi strategijami, katerih cilj je bil pridobitev uglednega družbenega položaja in drugih koristi, kot so na primer davčne olajšave. Dobrodelnost in filantropijo so v italijanski Švici v veliki meri podpirali izseljenci, kar potrjuje register volil in donacij, ki ga je kantonalna vlada vodila med letoma 1839 in 1886: 24 izseljencev od skupno 514 dobrotnikov je prispevalo približno 20 odstotkov skupne vrednosti vseh donacij. Domnevamo lahko, da so imeli izseljenci podobno pomembno vlogo tudi v 18. stoletju, kar potrujeta dva cerkvena beneficija, ki predstavljata primera uporabe altruističnih in redistributivnih mehanizmov v okviru družinskih strategij izseljencev. V vasi Prato v dolini Lavizzara sta dve trgovski družini, ki sta na Nemškem in drugod po Evropi trgovali z železom, kolonialnim blagom in drugimi proizvodi, leta 1762 ustanovili dva beneficija. Prvega sta v skladu z oporoko očeta ustanovila brata Davide Antonio in Francesco Giuseppe Berna, ki sta živela v Mainzu, cerkveno službo pa sta namenila tretjemu bratu, Don Giovanniju Giuliju Gerolamu, ki je ostal doma. V tem primeru je jasno razvidno uresničevanje družinske strategije, ki je omogočala finančno in socialno stabilnost ter kontinuiteto rodbine. Drugi beneficij, ki ga je ustanovil Carlo Antonio Guidini, pa lahko razumemo kot neuspešen poskus podobne strategije, ki jo je preprečila odsotnost neposrednih dedičev.

V primeru Guidinijevega beneficija je upravljanje prešlo na občino, natančneje pod nadzor drugih vplivnih trgovskih družin iz Prata. S tem je beneficij postopoma pridobil javni značaj in je bil vključen v proces podružbljenja. Pri upravljanju volil in beneficijev s strani javnih institucij se je pogosto odražalo dialektično razmerje med javnim in zasebnim. Volilo družine Tondü, ustanovljeno leta 1784 v Lionzi v dolini Centovalli, je predvidevalo letno mašo za pokojne člane družine v župnijski cerkvi. Vaška skupščina zemljiških posestnikov, imenovana za upraviteljico volila, je konec 19. stoletja prišla v spor s škofijo glede uporabe prihodkov iz zapuščine, saj so bila sredstva uporabljena tudi za druge namene, ki so služili potrebam skupnosti (razdeljevanje soli, različna gradbena dela v župnijski cerkvi, subvencioniranje najemnin za najemnike posestva).

Avtor na podlagi proučenih primerov predvideva, da so altruistične in redistributivne prakse predstavljale pomemben del učinkov izseljevanja. Te prakse so vplivale na celotno skupnost, pri čemer so se konkretni učinki razlikovali glede na namene darovalcev ter specifične okoliščine upravljanja volil, beneficijev ali donacij.

RETURN MIGRATION AND REAL ESTATE PROJECTS: PHILANTHROPY OR SPECULATION? THE EXAMPLES OF LE LOCLE AND LOCARNO (SWITZERLAND), FROM THE MID-19TH CENTURY TO THE 1910S

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ABSTRACT

Return Migration and Real Estate Projects: Philanthropy or Speculation? The Examples of Le Locle and Locarno (Switzerland), From the Mid-19th Century to the 1910s

The migration experiences of the past often generated financial flows linked to remittances or capital repatriation, whose main market was the private construction sector. It usually consisted of the construction of dwellings intended to complete the conservative project of the return to the homeland and represent the success of the personal career. The article draws on two real estate projects realized in two Swiss towns to show how, for two figures with a migration background from the mid-19th century onwards, the construction sector represented an entrepreneurial strategy based on a different balance between philanthropic idealism and speculative logic. **KEYWORDS:** return emigration, emigration induced, construction industry, real estate investments, philanthropy

IZVLEČEK

Povratne migracije in nepremičninski projekti: dobrodelnost ali špekulacija? Primera švicarskih krajev Le Locle in Locarno od sredine 19. stoletja do 20-ih let 20. stoletja

Migracijske izkušnje v preteklosti so pogosto ustvarjale finančne tokove, povezane z denarnimi nakazili ali repatriacijo kapitala, katerih glavni trg je bil zasebni gradbeni sektor. Običajno je šlo za gradnjo stanovanj, s katero naj bi se zaključil konservativni projekt povratka v domovino in ki bi simbolizirala uspešno osebno kariero. Avtorja v prispevku na podlagi dveh nepremičninskih projektov, izvedenih v dveh švicarskih mestih, pokažeta, kako sta dve osebi z migrantskimi izkušnjami od sredine 19. stoletja dalje uporabljali gradbeništvo kot podjetniško strategijo, ki je temeljila na ravnovesju med človekoljubnim idealizmom in špekulativno logiko.

KLJUČNE BESEDE: povratništvo, povzročeno izseljevanje, gradbeništvo, naložbe v nepremičnine, dobrodelnost

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INTRODUCTION

Historical analysis has often considered the use of financial resources for housing construction—from the more modest homes of the working classes to the more prestigious residences of the upper classes—as a means of “turning money into stone” (Fregna, 1990). More specifically, this has been linked to phenomena that fall back on income-based economic strategies (land investment, public income, private credit) at the expense of strategies aimed at productive investments (Aymard, 1991, pp. 9–13). This understanding would seem to be supported by the trajectory of many families who repositioned themselves economically by abandoning productive sectors linked to commercial and proto-industrial activities in favor of investing in land and property; however, from a supplementary perspective, it seems to be confirmed by the link between the rise in construction investments and the stagnation, or even regression, of several pre-industrial economies (Cipolla, 1988; Braudel et al., 1961; Chauvard, 2005, pp. 229–238).

In contrast to this interpretation, various analyses have underlined the multiplicative effects generated by the construction industry (Lévy-Leboyer, 1968), to the extent of leading J.-F. Chauvard and L. Mocarelli to say that “across Europe, economic prosperity has gone hand-in-hand with the construction boom” (Chauvard & Mocarelli, 2009, pp. 75). In other words, in both pre-industrial and industrialized economies, the construction sector and real estate investments have often reflected phases of wealth accumulation generated by periods of strong economic dynamism that, if accompanied by inflationary pressures, reduced the appeal of other investment sectors (e.g., credit). On the other hand, in addition to performing an anticyclical function and supporting employment through the public funding of building projects, the construction industry generated significant spin-offs for sectors linked to the production of construction materials. Finally, it is also important to bear in mind its effects on the property market and links to the credit market (Mocarelli, 2008, pp. 243–263).

Exemplified mainly in urban contexts (Yates, 2021) or countryside regions affected by capitalist agriculture, little evidence of these dynamics has so far been found in more strictly rural settings, where the building of houses was often the expression of an economy of “limited goods” in which the use value clearly exceeded the exchange value. Various analyses dedicated to rural contexts marked by widespread migration have, however, underlined the extent of the flow of funds linked to remittances or the repatriation of capital by migrants at the end of their time abroad (Lorenzetti, 2017; Carling, 2008; Warnecke-Berger, 2021). This flow often fed principally into private construction by building homes that were the crowning achievement of a journey that stayed loyal to the conservative plan to return home (Cricenti, 1993, pp. 213–219). As well as being the most widespread way of using savings and providing migrants’ children with a “safe refuge” against inflation or the uncertainty of financial investments, the new home acted as a sign of the success of

the migration experience and the repositioning of the individual and family within the local social hierarchy. In Ticino, like many other migration contexts in the Alpine Arc, there are countless examples of homes built using the savings accumulated by migrants, which, especially from the second half of the 19th century onwards, have redesigned the architectural and urban landscape (Ceschi, 2000; Cima, 2018, pp. 175–237).¹ In addition to creating hybrid architectural forms and styles (Daguerre, 1998; Cricenti, 1993, p. 218), these homes have also been the vehicle for disseminating new lifestyles that reflected the transnational dynamics brought with them by the migrants. From the mid-19th century onwards, these dynamics were embodied by the emergence of a new elite, often impregnated with a cosmopolitan culture—the expression of entrepreneurial and interpersonal expertise put to good use within the world from which they originally came (Lorenzetti & Granet-Abisset, 2009; Blanchard & Sirna, 2017).

Drawing on these initial considerations, this article attempts to verify the extent to which the business logic behind two real estate projects involving two small Swiss towns reflects the different migration experiences of their promoters. More specifically, it seeks to highlight the link between the migration experience and the formation of entrepreneurial know-how, evaluating the role of the local economic and social context—and the demand it manifests—in the development of real estate investments.

The analysis is based on a comparative approach that considers two different historical and urban contexts: on the one hand, the town of Le Locle (Canton of Neuchâtel), one of the capitals of the Swiss watchmaking industry, where a working-class neighborhood was built in the mid-19th century; on the other hand, Locarno (Canton of Ticino), a town with a commercial mission and which, at the end of the 19th century, experienced significant economic and tourist development, which led to an urban expansion of which the Quartiere nuovo was the centerpiece. By juxtaposing the economic logic guiding the two projects, we intend to test the hypothesis that the two real estate projects reflect two different entrepreneurial cultures directly influenced by their promoters' migration experiences (and different transnational identities).

1 See also the dossier *Emigrazione, sogni e realtà. Testimonianze architettoniche dell'emigrazione di ritorno nella Svizzera italiana*, sponsored by "Regio Insubrica" and UNITI, Cooperativa per il lavoro, started in May 1996 (<https://www4.ti.ch/can/oltreconfiniti/dalle-origini-al-1900/edifici-e-tracce-sul-territorio/>).

TWO MIGRATION EXPERIENCES AND TWO ENTREPRENEURIAL TRAJECTORIES

The two projects in focus relate to the so-called Quartier du progrès (also known as the Quartier neuf), which sprang up between 1856 and 1860 in Le Locle (Canton of Neuchâtel), and the Quartiere nuovo, built in the Saleggi area of the city of Locarno (Canton of Ticino) between the middle of the 19th and the beginning of the 20th centuries. Both real estate initiatives were principally promoted by two leading figures in the political life of the two towns who, in the first part of their active lives, experienced migration, albeit in different ways. In addition to conditioning the paths of their respective lives, this migration also influenced their relationship with the town where they lived after returning home.

Henri Grandjean: a returning migrant, part politician, part philanthropist

Henri Grandjean was born in Le Locle in 1803 and died there in 1879. The son of a watchmaker, at the age of 12, he began his apprenticeship in the art of watchmaking. In 1824, he was sent to Brazil—a country frequently visited by many families from the Jura Arc involved in international trade (Veyrassat, 1995; Veyrassat, 2014)—where years earlier, Henri's father had founded a branch of the family firm so that his sons could take care of business and diversify its activities (Rossinelli, 2023). On returning to Le Locle in 1831, Henri took over the reins of the family firm. At the same time, he made his name as an important figure in local political and cantonal life. He was, in fact, one of the leading figures in the 1848 revolution that led to the overturning of the aristocratic Neuchâtel regime and the establishment of the republic. After sitting on the town's revolutionary committee and provisional republican government and assuming the role of the prefect of Le Locle (1848–1852), Henri continued his career in the cantonal legislature (1848–1879) and federal parliament (1857–1860, 1866–1869), while continuing to expand his business interests and promote initiatives to support the region's economic modernization. In particular, he participated in creating the "Jura industriel" railway, of which he was a member of the board of directors. The line connected Neuchâtel to the mountainous part of the canton and was intended to stimulate regional economic development.

Although we do not know the reasons that motivated Henri Grandjean to dedicate his life to politics, his activity in the ranks of the radical party and close links to the philanthropic movement paint a picture of a figure in which a liberal spirit coexisted and blended with a personal social sensibility, demonstrated by his desire—in addition to his role as the brains behind and backer of the new working-class neighborhood—to found a soup kitchen for the town's working class, as expressed in his last will (Rossinelli, 2023, pp. 110–113).

Giovanni Pedrazzini: a returning migrant, part politician, part businessman

Giovanni Pedrazzini (1855–1922) was one of the principal backers of Locarno's Quartiere nuovo (Varini, 2012, pp. 155–157). Born in Locarno, he was descended from an important family of emigrants from the Valmaggia, active in international trade in Germany since the late 17th century (Chiesi Ermotti, 2019). After studying in Italy, in 1875, he left for the United States, where, like his fellow countrymen, he earned his living from different jobs for several years—coffee boy, wagoner, fruit seller, miner, etc.—which took him from one city to another, from New York as far as California. After returning to Ticino temporarily in 1886, he left again a few years later for Mexico, where he took over the running of several gold and silver mines before buying them outright and subsequently accumulating considerable wealth as a result (Bianconi, 1973).² Keen to give a future to his sons and daughters in their homeland,³ Giovanni returned to Ticino in 1900. Although we have been unable to find any information about his economic plans, they took shape quickly; in addition to the building of a luxury villa in an eclectic style (Villa Moresca) that showed off his acquired upper-middle-class status, Giovanni Pedrazzini instigated various entrepreneurial initiatives for the good of his city. A few years after returning home, he promoted the founding of the Banca Svizzera Americana to receive the savings of Ticinese migrants in California and make their transfer home easier (Nosetti, 2018, pp. 205–219).⁴ In Ticino, the bank helped fund the Società Elettrica Locarnese, founded in 1904 by Pedrazzini (who became its first president), who had recently acquired the concession to exploit the waters of the Maggia River. Along with Francesco Balli—who also descended from a family of emigrants from Valmaggia—he was also one of the promoters of the Valmaggia railway, which opened in 1907 (Broggini, 2007), and the architect of the construction of the Madonna del Sasso funicular, opened in 1906. Alongside his business and social activities,⁵ Giovanni also took on several political roles: between 1914 and 1916, he was mayor of Locarno, while between 1906 and 1922, he was a member of the Parliament of the Canton of Ticino.

2 On the subject of the wealth accumulated by Giovanni Pedrazzini, see the article “Ticinesi in California,” published in the newspaper *Gazzetta Ticinese*, 14 September 1897, p. 831.

3 As early as 1894, he informed his sister that: “[...] In November I had to go to New York on very important business, or better said, to try to place my mines with a consortium of capitalists,” because “at the sight of my growing angels I feel an imperious duty to return sooner or later to my homeland or other civilised lands to devote myself to their education” (Bianconi, 1973, p. 253).

4 The bank was based in Locarno and had an agency in San Francisco until 1909. Giovanni Pedrazzini was also one of the founders of the Banca del Ticino and participated in the foundation of the Banque Franco-Suisse in Paris.

5 In the funeral eulogy dedicated to him and published in the daily newspaper *Popolo e Libertà*, 13 March 1922, p. 2, we read: “There is no financial or patriotic or charitable institution that does not bear its name at the top of its head: from the electric company to the real estate, from Pro Locarno to the Hospital and the climate care.”

TWO REAL ESTATE PROJECTS FOR TWO NEW URBAN NEIGHBORHOODS

The Quartier du progrès in Le Locle

The Quartier du progrès in Le Locle came about against a backdrop of economic ferment, fueled by the thriving watchmaking industry but also by the issue of the lack of accommodation and constant rent increases. The idea for a new neighborhood with accommodation intended for workers in the watchmaking sector gained traction precisely in response to a social demand to improve their living conditions. (Faessler, 1960; Rossi, 1996). With this in mind, in 1855, Henri Grandjean and Edouard Thévenaz presented a wide-ranging real estate project aimed at the local working class to the Le Locle municipal council. Motivated by philanthropic intentions imbued with paternalism and religious spirit,⁶ the project aimed to protect the town's principal manufacturing sector by ending the housing shortage that was limiting the watchmaking workforce's local settlement. The announcement published in the *Feuille d'Avis des Montagnes* on 3 and 10 November 1855 emphasized that "if we want to avoid displacing the industrial population, the moment has come to focus seriously on a social project to build salubrious and modest houses to create homes with a cost that will not exceed two to three hundred Swiss francs" (Jung, 1973, p. 9).⁷

To this end, a few months later, in November 1855, a real estate company, the Société Immobilière du Locle, was formed with the initial capital of 500,000 Swiss francs, to be collected by the subscription of 5,000 shares worth 100 Swiss francs each (Rossinelli, 2023, p. 110). The triweekly *Le National Suisse* described the initiative as follows:

Rising rents and a lack of housing: this is the general situation [in the town of Le Locle] [...]; in Le Locle, the company founded by Henri Grandjean, inspired by the finest ideas of practical socialism, has laid the foundations for the new neighborhood. There is a real rush to build [...]. The money will come out of the pockets of private individuals for the construction companies only if they are offered benefits rather than warnings about a kind of socialism inspired by the heart but less effective in substance. Our thoughts turn first and foremost to the interests of the workers but also to those of the capitalists whose capital, especially in the mountains, has been earned through hard work and with the frugality of a sober and orderly life. And when we invite private individuals to participate in this construction movement, we believe we are right in saying that the private individuals will

6 ACL, G300: letter from Henri Grandjean and Edouard Thévenaz to the City Council of Le Locle, 25 August 1855 (see Rossinelli, 2023, p. 111.)

7 The argument was repeated in the same bulletin on 7 June 1856.

earn a profit—a large profit—by participating in a project that benefits all the inhabitants. No one is unaware that investing in building in the mountains is an excellent use of their money.⁸

The company's first act proved positive; by August 1856, it had already bought 36 plots of land and had signed the purchase of 41 homes, while the number of shares sold exceeded the initial forecasts.⁹ In the same month, 18 properties comprising 54 apartments had almost been completed. At the same time, the definitive real estate project, approved by the municipal authorities, included the construction of 98 residential properties in five different sizes, with the apartments priced between 215 and 360 Swiss francs.¹⁰ The economic crisis that struck shortly afterward slowed down progress on the project, which remained partially incomplete. Regardless, in 1860, 63 buildings housed 192 families (for a total of 787 residents), almost all directly linked to the watchmaking sector (Rossinelli, 2023, p. 112; Jeanneret, 2009, pp. 99–103).¹¹

The Quartiere nuovo project in Locarno

The origins of the Quartiere nuovo project in Locarno date back to 1883, when the municipality acquired a total surface area of 70,000 square meters in the area known as Prati Boletti, recently the site of reclamation work following the canalization of the Maggia River (Giacomazzi et al., 1991, pp. 56–59). After being divided into lots, part of this area was sold off in 1894 to facilitate building and relaunch commercial activity in the city through lake traffic (Giacomazzi, 1998, p. 69). Two years later (1896), the municipality purchased from the *Corporazione dei Borghesi di Locarno* a further surface area of 350,000 square meters in the Saleggi area south of Prati Boletti. This purchase was followed in 1898 by the drawing up of a master plan to define the road network within the area, with its subdivision into plots to be sold as building land and a part kept aside for public use.¹² The master plan was laid out on an orthogonal chessboard in which the streets defined the various plots earmarked for building. The first public auction, held in April 1899, had little success, however—so much so that it led the municipal authorities to relax the requirements of the master plan and grant exemptions on building on the most valuable plots along the lake (Giacomazzi et al., 1991, p. 58). The measures must have had the desired effects because almost

8 "Le logement dans le Jura," in *Le National Suisse*, 29 April 1857, p. 1. (translated by the authors).

9 In August 1856, the Company had 192 non-owner shareholders who had subscribed for 676 shares of 100 Swiss francs each, while 41 other owner shareholders had subscribed for shares with a total value of 972,200 Swiss francs. In addition to this, the Company had received private loans for a total of 53,814 Swiss francs.

10 "Fête du travail. Au Locle," in *Le National Suisse*, 9 November 1856, p. 2.

11 ACL, G300: Association immobilière du Locle. Assemblée générale des actionnaires du 5 mai 1860 (p. 2). In addition, there were several ateliers housing various watchmaking craftsmen.

12 Archivio Comunale di Locarno, Risoluzioni dell'Assemblea comunale, vol. 7.

all the plots were sold in the following years. In just the autumn of 1908, 24 plots were sold for an overall surface area of approximately 88,000 square meters, which brought the municipality of Locarno roughly 100,000 Swiss francs.¹³

Through the Società Immobiliare Ticinese, which he founded in 1905, Giovanni Pedrazzini provided the initial impetus for developing the new neighborhood in Locarno. It was some years before it actually came to life, however, thanks in particular to the construction of various small apartment blocks and houses, to which buildings were added in the western section for the establishment of various commercial and industrial activities (including a soap factory, a precious stone processing company, and a hat factory) as well as some houses for workers. The strip closest to the lake was instead reserved for a series of luxury homes belonging to the wealthy local bourgeoisie and emigrants who had returned home after making their fortunes abroad (Giacomazzi, 1998, p. 70, 80). In 1916, a local daily newspaper described the neighborhood as follows:

This extremely modern neighborhood offers curious contrasts: monumental public buildings follow on from elegant, gleaming villas; buildings with harsh lines and a grandiose bulk alternate with industrial plants, hangars, workshops, etc. and workers' houses that are as big as barracks. Together, it forms a picturesque chessboard of white buildings and green gardens, bordered by the glaucous lake and suffused by the gentle sylvan poetry emanating from the solemn consistory of poplars gathered in the Bosco Isolino [...]. The Società Immobiliare has given the greatest and most effective impetus to this radical metamorphosis, to this creation from scratch of an entire neighborhood built according to a complete and rational master plan. It has recently even completed a grandiose four-story residence that may be the largest and most modern construction of this latest period of building. Other houses and villas are underway, while the foundations are being laid for others still [...].¹⁴

It is worth adding that while Giovanni Pedrazzini was developing his real estate project in Locarno, Giuseppe Soldati, an emigrant from Lugano, was developing a wide-ranging entrepreneurial activity that included the building sector in Argentina. Indeed, he promoted the urban expansion of Buenos Aires and, through speculative land transactions, the building of two new neighborhoods (Villa Lugano and Villa Soldati) on the southern outskirts of the city (Daguerre, 1998, p. 56–61). Although there are no indications of a relationship between the two personalities, the two real estate projects show the Ticino emigration world's interest in real estate and the building industry.¹⁵

13 The data are published in the newspaper *Popolo e Libertà*, 14 December 1908, p. 2, and 14 September 1908, p. 2.

14 *Popolo e Libertà*, 22 August 1916, p. 2.

15 See also the example of some Luganese emigrants in Trieste where, in the 19th century, they worked as building entrepreneurs (Cattaneo et al., 2012, p. 188–199).

MIGRATION, ENTREPRENEURSHIP AND REAL ESTATE INVESTMENT

Although succinct, the information presented so far allows us to develop two lines of thought: the first relates to emigration's ability to remain a resource even once it has ended or after the emigrant has returned home. The second questions the conditions that turn real estate investment from a "self-centered" repercussion—in other words, for the direct use and benefit of the person (or family group) at its origin—to an "exo-centered" repercussion regarding a wider circle of reference, the contours of which are outlined by the degree of rivalry and excludability of the goods or services that generate it.

An apprenticeship in the capitalist economy: two distinct paths

The two real estate projects outlined above are closely linked to two figures whose migration experiences coincided with two different phases in the history of Swiss emigration overseas: for Henri Grandjean, the "late pioneering" of the first decades of the 19th century that helped integrate Swiss trade into the economy of other countries; for Giovanni Pedrazzini, the mass emigration of the second half of the 19th century, not infrequently fueled by poverty and the mirages of easy wealth.

In the mountains of Neuchâtel, the mobility of people and goods was one of the characteristic features of Switzerland's economic penetration into international markets (Veyrassat, 2014, p. 267). From this perspective, Henri Grandjean's migration can be seen as a building block in the story of Swiss capitalist expansion into the trade circuits of the international colonial economy (Veyrassat, 2018). His emigration was part of an economic framework already structured between the coordinates of proto-industrial capitalism interwoven with the network of international trade in which emigration was the driving force behind its expansion. However, this observation needs to be more precise. If, on the one hand, the end of his time in Brazil did not mark a breakdown in Henri's relations with countries on the other side of the Atlantic—he would make several further trips to American soil to consolidate and expand his trade and business network—on the other, his experience seems to have remained largely impermeable to transnational influences. His sense of belonging focuses on identity, social practices, and relationship networks; he also focuses on the local (Le Locle) and regional (the Canton of Neuchâtel) settings. Like many other Neuchâtel watchmakers, he remained far from the cosmopolitan culture of the "Internationale du négoce et de la finance" favored by the elite of his canton (Scheurer, 1994). His trajectory did not make him a "marchand-banquier," and his economic initiatives remained anchored in the network of local affairs. In other words, Henri followed the "proto-industrial mentality" of the Jura Mountains, simultaneously highlighting one of the paradoxes of the globalization of that era. Despite being a part of a globalized economy, his entrepreneurial spirit remained far from

international capitalism, anchoring itself to the economic and cultural practices of the regional setting (Veyrassat, 2014, pp. 275–276).

Giovanni Pedrazzini's migration, on the other hand, is part of the history of the great European exodus to the American continent. An exodus that led approximately 50,000 Ticinesi to leave their homeland between 1850 and 1913 for overseas countries (Lorenzetti, 2007). Among the thousands of stories that have faded into anonymity (and sometimes poverty), occasionally trajectories marked by surprising entrepreneurial success emerge and—as in the case of Giovanni Pedrazzini—by the attainment of huge economic wealth. On the one hand, this achievement marked the end of Giovanni's overseas adventure and his return home. On the other, it did not end his business links with Mexico, which he entrusted to Antonio Pedrazzini.¹⁶

From this perspective, the two sequences of events reflect two different emigration stories. Henri's story was grafted onto an entrepreneurial framework that was already structured but, at the same time, dependent on its commercial logic. In other words, its entrepreneurial culture is entirely built within the local society, and emigration only plays an instrumental role concerning the investment logic focused on the family business. On the other hand, Giovanni's migration experience gave rise to entrepreneurial skills that he developed in various economic sectors, free from family constraints. Two different ways of transposing the migration experience onto an origin context through specific economic and social projects are revealed. To put it another way, the two migration trajectories brought about two different forms of social repercussion,¹⁷ whose forms and impact depended on the means of their transmission and characteristics of the transnational links from which "senders" and "recipients" drew.

While his time in Brazil lived on in Henri Grandjean through his business network, there seems to be no trace of a link between the public roles he took on in the canton and his emigrant past. No explicit trace appears to link his years in South America with his urge for philanthropy, the origins of which can likely be found in the debate about the social role and responsibilities of the bourgeoisie toward the working classes that ran through early 19th-century Neuchâtel society (Christ, 2009). In other words, Henri Grandjean reflects a transnationalism limited to the business network and impermeable to the sociocultural sphere.

In the case of Giovanni Pedrazzini, the consequences of his migration experience on the direction of his life after his return home appear, to some extent, more immediate. Giovanni Pedrazzini experienced first-hand the boom in European overseas emigration in the second half of the 19th century, coming into direct contact with the ethnic and cultural melting pot on the American continent and assimilating its pioneering soul and spirit of initiative. In Mexico, he married Dolores Palacio, with

16 Antonio Pedrazzini, was called to Mexico by Giovanni Pedrazzini himself, who entrusted him with increasingly important tasks until he was appointed director of his mines in 1903.

17 By social remittances we mean the ideas, behaviors, identities, and social capital that flow through migration from destination countries to countries of departure (Levitt, 1998).

whom he had ten children; six were born in Mexico, and four were born after his return home to Locarno. At the same time—as for other European and Ticinese emigrants at that time—Giovanni Pedrazzini’s experience overseas represented a genuine apprenticeship in capitalism and its financial tools (Ceschi, 1998, p. 320), which, once he had returned home, he translated into a series of initiatives in different entrepreneurial fields, from energy to transport, and banking to real estate. This is evidenced by the letters he sent home in the years preceding his return. In May 1884, for example, he wrote to his sister Maria, “In addition to being the director of all my affairs with more than 100 men in my service, I am often forced to be a businessman, engineer, lawyer, doctor, and judge at the same time. In addition to significant work in my mines on an extension of more than five kilometers, I am currently extremely busy finishing and perfecting my machine plant, building vast warehouses, a school, and a chapel for Roman Catholic worship, of course” (Bianconi, 1973, p. 252). The discovery of new silver seams led him to “spend huge amounts to supply my company with machinery, factories, and utilities, etc. for land purchases and hydraulic works, etc.” (Bianconi, 1973, p. 258). As he expanded his business, he also widened his contacts and ties with the banking world and began to organize the flow of remittances through a widespread network of financial intermediaries. It could be said that it was precisely due to these experiences that his processes of identification, activities, and relationships converged toward an “integrated transnationalism” that his return home did not completely eliminate (Ambrosini, 2009, pp. 687–688).

Two real estate projects and two perspectives on society

The two new neighborhoods of Le Locle and Locarno were based on different projects reflected in the roles played by the two real estate companies behind them. Real estate companies emerged on the Swiss urban development landscape in the mid-19th century, rapidly becoming key stakeholders and, not infrequently, replacing public authorities when it came to designing and building new neighborhoods (Lüthi, 2010). In the town of Neuchâtel, in particular, in the space of a few months (between May 1858 and July 1859), as many as five real estate companies were founded that obtained the financial support of the municipality, which saw them as a potential income generator and a means through which to promote the town’s urban development (Piguet, 2010). In the second half of the 19th century, in Neuchâtel, as in other towns in the confederation, real estate companies shifted the act of building from something with political and social power to a representation of economic power and a form of high-yield investment (Lüthi, 2010, p. 127), not without a speculative component. In fact, as F. Walter recalls, the latter was one of the drivers behind Swiss urbanization, in turn, “steered” by real estate companies that, by buying and selling or improving urban infrastructure, obtained a high added value on their initial investments (Walter, 1994, pp. 66–67).

That said, it is important to remember that the real estate companies of the second half of the 19th century seem to have been motivated by a range of objectives, from those more closely linked to the requirements of the upper classes to others more attentive to the social and philanthropic dimension. It would, however, be wrong to see an incompatibility between these two perspectives (Lüthi, 2010, pp. 131–132, 136). In the eyes of their promoters, the Société Immobilière du Locle was, at the same time, a savings bank for the working class and a mortgage fund for capitalist investors who saw it as an opportunity to make a profit. For Henri Grandjean, in particular, the Quartier du progrès real estate project was the opportunity to give shape to a republican and liberal cooperativism that, for its shareholders, meant keeping their capital returns below 4%¹⁸ and which at the same time proposed to “create as many owners as possible,” encouraging residents to participate directly in the financing (Hauser & Barbey, 1991, p. 141). The project, therefore, represented “The implementation of a major association system in which all the forces are brought together to arrive at the same goal, the moralization of men through enjoyable work and a wise economy.”¹⁹ In other words, the Quartier neuf project was a philanthropic alternative to real estate speculation and departed from bourgeois projects to “tame” the working classes through housing individualism. At the same time, it moved away from the visions and housing community projects championed by Charles Fourier and Jean-Baptiste André Godin’s utopian socialism (Hauser & Barbey, 1991, p. 143).

However, the real estate company behind Locarno’s Quartiere nuovo came about thanks to a very different premise. Giovanni Pedrazzini operated within an entrepreneurial perspective that combined a business mind—that never forgot the interests of his home valley²⁰—with the ideals of modernizing his city. His interest in real estate investment dated from 1904 when, together with Augusto Spieler, he founded a “simple partnership” for purchasing, selling, and improving real estate and erecting buildings and renting them out in Monti della Trinità, Locarno.²¹ A few weeks earlier, Giovanni Pedrazzini had demonstrated his interest in the Quartiere nuovo real estate project launched by the municipality of Locarno, buying, through the intermediary Alessandro Ghezzi (future director of his real estate company), two lots in the area put up for auction by the city for a total sum of 34,090.74 Swiss francs.²² In October of the same year, he signed the purchase of two further lots for

18 “Quetion des loyers” in *Le National Suisse*, 7 December 1856, pp. 1–2.

19 “Etat de situation, au 20 août 1856, de l’Association immobilière du Locle,” in *Le National Suisse*, 31 August 1856, p. 3.

20 Although he no longer resided in Valmaggia, after his return to Ticino Giovanni Pedrazzini undertook several purchases and sales in his home valley.

21 ASTi, Fondo notarile, Distretto di Locarno, Respini Giuseppe, sc. 655, Locarno, 27 Jun 1904.

22 These are lot A of 3964.21 sq. m at 5.90 Swiss francs per sq. m and lot C of 3567.30 sq. m at 3.00 Swiss francs per sq. m. See ASTi, Fondo notarile, Distretto di Locarno, Volonterio Luciano, sc. 728, Locarno, 27 May 1904.

23,955.30 Swiss francs.²³ In the wake of these purchases, the following year (1905), he founded the Società Immobiliare Ticinese with a share capital of 500,000 divided into 1,000 bearer shares of 500 Swiss francs each. His principal goals were selling and trading in land and buildings in Ticino (in the Locarno region in particular), selling and managing real estate as an intermediary, building on his plots, and constructing roads and any other infrastructure aimed at increasing the value of the social real estate assets.²⁴

Despite the rapid tourism development in the city that, in addition to several hotels, saw the construction of the first holiday homes, Giovanni Pedrazzini's expectations were met with a rather lackluster demand for real estate that slowed the development of the new neighborhood considerably.²⁵ In late 1908, given the sale of all the available lots in the area planned for the new neighborhood, the shareholders' meeting decreed the dissolution of the Società Immobiliare Ticinese.²⁶ It was, however, re-founded four years later, again by Giovanni Pedrazzini, with the name Società Immobiliare Locarno,²⁷ which was more speculative, to the extent that several buildings were built without the presence of a specific client (Baer, 2007, pp. 297–298; Concheiro, 2016, p. 6). In 1915, there were assorted vacant apartments and several small houses and apartment blocks still without buyers in the Quartiere nuovo.²⁸ Moreover, by 1914, the weak demand for real estate had led the Società Immobiliare Locarno to refocus its activity. Instead of applying to build small individual houses for each lot, it submitted requests to the municipality to construct a large building,²⁹ which, in addition to ensuring adequate tax revenue for the city, would provide it with adequate profits from renting the apartments. Diversification from the original residential vocation of the Quartiere nuovo was consolidated in the years that followed with the establishment of various industries, not without provoking discontent on the part of the local population, who believed it would damage the tourism sector.

23 These are lot P of 6649.50 sq. m and lot O of 1335.60 sq. m, both for 3.00 Swiss francs per sq. m. See ASTi, Fondo notarile, Distretto di Locarno, Franzoni Cesare, sc. 382, Locarno, 8 October 1904.

24 See *Foglio ufficiale svizzero di commercio*, 382, 23 (1905), p. 126. Giovanni Pedrazzini assumed the function of president of the Board of Directors.

25 The purchase that Pedrazzini himself made of a plot in the Quartiere nuovo previously purchased by his real estate company is symptomatic. See ASTi, Fondo notarile, Distretto di Locarno, Modini Ignazio, sc. 517, Locarno, 18 May. In the same year, the municipal authorities approved the construction of a small villa designed by architect Ghezzi and a building with an adjoining workshop designed by a certain Quirici (see *Popolo e Libertà*, 25 January 1907, p. 2). Subsequently, Giovanni Pedrazzini's real estate company made only one real estate sale, in 1914. See ASTi, Fondo notarile, Distretto di Locarno, Franzoni Giacomo, Locarno, 16 January 1914.

26 FU, 1920, n. 90. 9 November, p. 1467. However, it was not until 1920 that it was removed from the trade register.

27 See FU, 1912, August 99, 10 December 1912, p. 1394.

28 See the article "Locarno e Muralto," in *Popolo e Libertà*, 25 June 1915, p. 2.

29 See "Nel campo edilizio," in *Popolo e Libertà*, 20 March 1914, p. 2.

CONCLUSION

The stories of Henri Grandjean and Giovanni Pedrazzini and the construction projects they promoted highlight countless (and surprising) analogies. At the same time, they indicate the different weight their migration experiences had on their lives once they ended.

Both Grandjean and Pedrazzini laid the foundations for their economic success in the Latin-American markets, with which they maintained relations even once they had definitively returned home; they both embarked on a political career in their respective cantons and the municipalities in which they lived; they both undertook business activities that touched on different fields (including railways and finance); they both promoted and supported a real estate project involving the building of a new neighborhood in their town; they both redesigned the perspectives of “turning money into stone,” transforming real estate into “goods” that were part of a market economy based on the creation of surplus value; they both started their project by founding a real estate company based on shareholders; both projects eventually came about thanks to a precise entrepreneurial strategy that, for Henri Grandjean, was about defending his interests in the watchmaking industry and, for Giovanni Pedrazzini, about promoting broad-based entrepreneurial activity.

However, these many similarities were accompanied by several differences. While the Quartier du progrès designed by Henri Grandjean was based on liberal philanthropy and his proposals to improve the living conditions of the working classes, the development of the Quartiere nuovo supported by Giovanni Pedrazzini reflected his faith in modernizing forces as the foundation of social progress, yet still as part of a profit-oriented entrepreneurial project.

At the same time, the two projects respond to distinct “urban demands.” The Quartier neuf in Le Locle stems from a social demand from the working-class world. On the other hand, the Quartiere nuovo in Locarno is conceived as a driver for the economic and tourist growth of the city, which the municipal authorities seek to promote by favoring the establishment of housing and production activities.

Finally, in addition to reflecting the migration history of two different generations and distinct economic contexts, the stories behind these two real estate projects show that the act of turning money into stone generated by emigration did not exclusively produce “self-centered” repercussions but also “exo-centered” ones. In both cases, these repercussions were explained within entrepreneurial initiatives that, through real estate, expressed different degrees of excludability (from the moderation of social housing in the working-class neighborhood of Le Locle to the more marked upper-middle-class residential construction in the new neighborhood in Locarno). With this in mind, we can grasp the different entrepreneurial perspectives that motivated the promoters of the two projects: Henri Grandjean’s focus on redistributive dynamics and Giovanni Pedrazzini’s favoring of utilitarian logic.

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ABBREVIATIONS

ASTi – Archivio di Stato del Cantone Ticino, Bellinzona

ACL – Archives communales du Locle, Le Locle

FU – Foglio Ufficiale del Cantone Ticino

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POVZETEK

POVRATNE MIGRACIJE IN NEPREMIČNINSKI PROJEKTI: DOBRODELNOST ALI ŠPEKULACIJA? PRIMERA ŠVICARSKIH KRAJEV LE LOCLE IN LOCARNO OD SREDINE 19. STOLETJA DO 20-IH LET 20. STOLETJA

Luigi Lorenzetti, Fabio Rossinelli

Naložbe v gradbeništvo so bile dolgo povezane s premalo dinamičnimi gospodarskimi okoliščinami, ki niso bile sposobne ustvariti dinamike rasti. Vendar pa je bila z novejšimi zgodovinskimi analizami ta teza zavrnjena, saj sta bili izpostavljeni proticiklična funkcija gradbeništva na trgu dela ter vloga tega sektorja pri podpiranju agregatnega povpraševanja in, natančneje, nekaterih gospodarskih sektorjev (Mocarelli, 2008).

Ta analitična perspektiva se je večinoma osredotočala na urbana okolja, za katera so bile značilne faze širitve oziroma znatno povpraševanje po stanovanjih s strani višjih razredov (Yates, 2021). Vendar pa številni znaki kažejo, da se je smiselno posvetiti tudi podeželju, kjer so lahko kljub temu, da je bilo stanovanjsko vprašanje pogosto odraz gospodarstva »omejenih dobrin«, migracije ustvarjale finančne tokove, povezane z nakazili ali repatriacijo kapitala (Warnecke-Berger, 2021), ki so spodbujali gradbeništvo z gradnjo stanovanj. Slednja je bila poleg tega, da je bila najpogostejši način porabe prihrankov in da je otrokom migrantov zagotavljala »varno premoženje«, zaščiteno pred inflacijo ali negotovimi finančnimi naložbami, tudi simbol uspešnosti migranta ter njegovega osebne in družinskega vzpenjanja po lokalni družbeni hierarhiji (Ceschi, 2000; Lorenzetti, 2017).

V migrantskih okoljih obstajajo nešteti primeri bivališč, ki so bila zgrajena s prihranki migrantov in so zlasti od druge polovice 19. stoletja dalje preoblikovala lokalno arhitekturno in naselbinsko podobo ter obenem uveljavljala modele in načine življenja, ki so odražali transnacionalno dinamiko, katere nosilci so bili migranti (Cricenti, 1993; Daguerre, 1998). Od sredine 19. stoletja naprej se je ta dinamika odražala v pojavu novih elit, katerih pogosta značilnost je bila kozmopolitska kultura, odraz podjetniškega in relacijskega znanja, ki ga je bilo mogoče s pridom izkoristiti v njihovih izvornih okoljih. V tem pogledu avtorja prispevka pokažeta, da naložbe v gradbeništvo niso odražale zgolj »konservativnih« strategij, povezanih z reprodukcijo družine, temveč tudi na druge logike, povezane z strategijami naložb, bodisi materialnih ali nematerialnih.

Avtorja v prispevku analizirata dva nepremičninska projekta, izvedena v dveh švicarskih mestih Le Locle in Locarno, pri čemer pokažeta, da odražata dve različni migracijski izkušnji, povezani z osebnostmi njunih nosilcev. Na splošno pa oba primera ponujata vpogled v to, kako je na podjetniške odločitve obeh (ter na njuno vlogo v obeh nepremičninskih projektih) vplivala transnacionalna kultura, pridobljena v obdobju izseljenstva.

Č L A N K I A R T I C L E S

ANALIZA PRISELJEVANJA V SLOVENIJO IZ (IN PREKO) DRŽAV NEKDANJE SFRJ Z UPORABO EKLEKTIČNEGA MODELA MEDNARODNIH MIGRACIJ

Aleš Bučar Ručman¹

COBISS: 1.01

IZVLEČEK

Analiza priseljevanja v Slovenijo iz (in preko) držav nekdanje SFRJ z uporabo eklektičnega modela mednarodnih migracij

Avtor v prispevku predstavi analizo priseljevanja v Slovenijo iz in preko držav na ozemlju nekdanje SFRJ. Izhodiščno ogrodje analize predstavlja eklektični model teorije migracij, ki vključuje sintezo in nadgradnjo obstoječih migracijskih teorij. V središče modela avtor postavi teorijo svetovnih sistemov, ki jo nato nadgradi z ugotovitvami drugih ključnih teorij migracij. S pomočjo analize statističnih podatkov, intervjujev/pogovorov s strokovnjaki in praktiki v Sloveniji in BiH ter sodelovanja v skupini za pripravo Strategije Vlade Republike Slovenije na področju migracij avtor preveri ugotovitve eklektičnega modela na primeru priseljevanja v Slovenijo iz (in preko) nekdanje SFRJ.

KLJUČNE BESEDE: eklektični model teorije migracij, SFRJ, Slovenija, teorija migracij

ABSTRACT

An Analysis of Immigration to Slovenia From (and Through) Countries of the Former SFRY With the Use of the Eclectic Model of International Migration

The article presents an analysis of immigration to Slovenia from (and through) the countries of the former SFRY. The framework of the analysis is an eclectic migration theory model, which synthesizes and upgrades existing migration theories. At the center of the model, the author places the world-systems theory, which is upgraded with findings of other key migration theories. Through the analysis of statistical data and interviews/conversations with experts and practitioners in Slovenia and Bosnia and Herzegovina, as well as through the participation in the group for the preparation of the Slovenian Immigration Strategy, the author verifies the findings of the eclectic theoretical model on the case of immigration to Slovenia from (and through) the former SFRY.

KEYWORDS: eclectic migration theory model, SFRY, Slovenia, migration theory

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UVOD

Kljub temu, da se meje med tradicionalnimi vlogami držav v migracijskih procesih brišejo in da države prevzemajo vloge tako izvornih kot ciljnih in tranzitnih držav, lahko v slovenskem prostoru po drugi svetovni vojni, natančneje od 1970-ih let dalje, prepoznamo obdobja izrazitega priseljevanja iz drugih delov Socialistične federativne republike Jugoslavije (SFRJ).¹ Pri tem je šlo za specifično notranje, a obenem med-narodno priseljevanje v Slovenijo iz drugih republik (Bučar Ručman, 2014; Dolenc, 2005; Josipovič, 2006). Drugo, še obsežnejše priseljevanje je potekalo po letu 2000 in je doživelo vrhunec med letoma 2004 in 2009 ter po letu 2017 (SURs, 2024a). V vmesnem obdobju 2009–2017 se je priseljevanje zmanjšalo predvsem zaradi vpliva globalne gospodarske recesije na slovensko gospodarstvo ter posledičnega skokovitega porasta brezposelnosti in zmanjšane potrebe po (tujih in domačih) delavcih.² V vmesnem obdobju, ko je postalo jasno, da recesije v Sloveniji ne bo hitro konec (2011–2017), se je poleg zmanjšanja priseljevanja povečalo odseljevanje državljanov Slovenije v tujino – zlasti v Avstrijo in Nemčijo (SURs, 2024b). Z okrevanjem gospodarstva po letu 2017 se je zaradi potreb na trgu dela in izboljšanja socialnih razmer priseljevanje vrnilo na raven pred recesijo in jo po končanju omejitev za preprečevanje širjenja koronavirusa celo preseglo. V celotnem obdobju priseljevanja od 1970-ih let dalje pa imajo posebno mesto v migracijskem sistemu Slovenije države, nastale na ozemlju nekdanje SFRJ, od koder prihaja večina priseljencev.³

Slovenija je bila od osamosvojitve vključena tudi v večja migracijska gibanja beguncev. S pričetkom vojne na Hrvaškem in v BiH je v Slovenijo prišlo večje število beguncev (med 70.000 in 100.000) in nato še manjše število ob vojni v Srbiji in na Kosovu. Najmočnejše pa so slovenski družbeno-politični prostor in javni diskurz zaznamovale begunske migracije večinoma sirjskih beguncev, ki so v obdobju

1 Josipovič (2006, str. 132–133) navaja podatke, da je v Sloveniji še sredi 1950-ih prevladovala emigracija nad imigracijo, kar je vplivalo na negativen selitveni prirast. Emigracija je prevladovala celo še v 1960-ih letih, navkljub drugačnim podatkom v popisih prebivalstva – ti so namreč vse do leta 1991 vključevali zdomce kot prebivalce Slovenije, čeprav so ti že več let (in vedno bolj očitno celo za stalno) bivali v tujini.

2 Leta 2008 je bilo v Sloveniji brezposelnih 43.000–52.000 ljudi oz. 4,1–5,1 % delovno aktivnega prebivalstva, na vrhuncu recesije v obdobju 2013–2014 pa se to je število več kot podvojilo in je celo preseglo 110.000 (11,1 %). Z okrevanjem gospodarstva se je število brezposelnih v Sloveniji zmanjšalo in je v letu 2024 doseglo najnižje vrednosti (34.000 oz. 3,4 %) (SURs, 2024e).

3 V letih 2004–2023 je največ priseljencev vsako leto prišlo iz BiH, nato sledijo Srbija, Kosovo, Severna Makedonija. Delež priseljenih iz držav nastalih na ozemlju nekdanje SFRJ (glede na državljanstvo priseljencev) je bil v tem obdobju med 56 in 76 %. Te migracije so v prvi vrsti povezane s potrebami na trgu dela, predvsem v fizično intenzivnih poklicih, kar je razvidno tudi iz razmerja med priseljenimi moškimi in ženskami. Iz Srbije je prišlo 3,7 krat, iz BiH 3,2-krat, iz Kosova 2,1-krat in Severne Makedonije 1,9-krat več moških kot žensk. Poleg gospodarskih razmer se pri priseljevanju vidi tudi vpliv družbenopolitičnih razmer in vojne. Vojna v Ukrajini je prisilila ljudi v beg in begunci iz Ukrajine so po letu 2022 prišli tudi v Slovenijo in med skupinami priseljenih prebivalcev leta 2022 zavzeli drugo mesto po številu priseljenih, takoj za priseljenci iz BiH (SURs, 2024c).

2015–2016 prehajali skozi Slovenijo. Razmere so bile v EU prikazane kot nekakšno izredno stanje. Priče smo bili sekuritizaciji begunskih migracij in moralni paniki. Slovenija je prevzela vlogo polperifernega stražarja jedrnih držav EU, za katere je opravljala »umazano delo« (Bučar Ručman, 2018).

Prikazani opis kaže na raznolikost migracij v našem prostoru, k njim pa je treba dodati še številne druge oblike migracij (npr. združevanje družin, študijske migracije, napotitve delavcev v tujino, neregularne migracije). Slovenija ima očitno aktivno vlogo v sistemu mednarodnih migracij, pri čemer vstopa vanj v vseh treh vlogah: kot država, v katero se ljudje priseljujejo, kot država, od koder se ljudje odseljujejo, in kot tranzicijska država. V pričujočem prispevku se osredotočamo na vprašanja priseljevanja v Slovenijo in iščemo odgovore na sledeče raziskovalno vprašanje: Kako lahko z obstoječimi migracijskimi teorijami in njihovo smiselno integracijo v eklektični model pojasnimo priseljevanja v Slovenijo iz (in preko) prostora nekdanje skupne države SFRJ?

RAZISKOVALNE METODE

Pri iskanju odgovorov smo posegli po raziskovalnem pristopu inference, ki ga Barakso et al. (2014) opišejo kot analizo in uporabo že zbranih podatkov in dejstev, na osnovi katerih so oblikovana nova spoznanja in ugotovitve. V našem primeru ustvarjanje novega predstavlja povezovanje migracijskih teorij, ki so bile preverjene in oblikovane na osnovi migracij v drugih okoljih. Po vzoru Masseyeve analize migracij med Mehiko in ZDA (Massey, 2015) analiziramo migracije v Slovenijo iz (in preko) držav na ozemlju nekdanje SFRJ. Za analizo uporabljamo deskriptivno inferenco, s katero predstavljamo značilnosti teh migracij, kot tudi kavzalno inferenco, s katero skušamo s pomočjo eklektičnega modela pojasniti vzroke za te migracije. Podatki, ki jih vključujemo v našo analizo, obsegajo različne statistične podatke in poročila o migracijah, znanstveno literaturo, vezano na migracijske teorije, ter zaključke sestankov (pogovori oz. intervjuji), ki jih je avtor opravil v BiH – sestankov s predstavnikom IOM (24. oktobra 2022), predstavniki UNHCR (24. oktobra 2022) in predstavnico nevladne organizacije INTERGreat (22. oktober 2022) ter sestankov delovne skupine vlade za pripravo Strategije Vlade Republike Slovenije na področju migracij (v obdobju 2022–2024) in srečanja strokovnjakov s področja migracij (predstavnikov Policije, Inštituta za slovensko izseljenstvo in migracije ZRC SAZU, Pravnoinformacijskega centra nevladnih organizacij in Delavske svetovalnice), ki je bil organiziran 17. 10. 2023. Zapisnike sestankov hrani avtor prispevka.

V prispevku bomo kritično ovrednotili obstoječe teorije in jih po vzoru pristopa De Haasa (2021) in Massey (2012; 2015) nadgradili v celostni oz. eklektični model migracij (Bučar Ručman, 2014). Migracijske teorije z vidika različnih znanstvenih disciplin (sociologije, ekonomije, geografije, demografije, zgodovine, politologije, psihologije itd.) pojasnjujejo migracijske tokove, vzroke in posledice. Izhodiščno

razumevanje za oblikovanje modela je zaključek Josipoviča (2006), da nobena migracijska teorija ne uspe v celoti razložiti migracij, ki so, kot navaja Lukšič Hacin (1999, str. 144), kombinacija »spleta različnih dejavnikov, kjer eden od njih lahko prevladuje, prav gotovo pa se vzajemno dopolnjujejo«. Massey (2015) predlaga celostni pristop, ki vključuje: 1) pojasnilo strukturnih dejavnikov v izvornih državah, ki ustvarjajo populacijo, pripravljeno na migracijo; 2) strukturne dejavnike v državah prejemnicah, ki ustvarjajo stalno povpraševanje po migrantskih delavcih; 3) analizo motivacije in odločitev ljudi, ki se odzivajo na te strukturne dejavnike z migracijo; 4) pojasnilo delovanja transnacionalnih struktur in organizacij, ki se vzpostavijo v podporo migracijskim tokovom; 5) analizo vladnih politik posameznih držav na področju mednarodnih migracij in oceno doseganja zastavljenih ciljev v praksi.

OBLIKOVANJE EKLEKTIČNEGA MODELA

Izhodišče modela: teorija svetovnih sistemov

Pregledi migracijskih teorij, ki so jih opravili različni avtorji (npr. Klinar, 1975; Massey et al., 1993; Massey, 1990; 2012; 2015; Gombač, 2005; Josipovič, 2006; Castles & Miller, 2009; Bučar Ručman, 2014; De Haas, 2021), predstavijo številne partikularne teorije migracije in dejavnikov, ki vplivajo nanje, ne uspejo pa narediti sinteze in združiti ugotovitev. Prav slednje je cilj tega prispevka, pri čemer sledimo ugotovitvi Van Heara, da je raznolikost pristopov različnih migracijskih teorij prednost (Van Hear, 2010). Naš model ne predstavlja poskusa oblikovanja ene vseobsežne migracijske teorije, temveč gre za združevanje in oblikovanje eklektičnega modela, ki ga shematsko prikazujemo na Sliki 1 spodaj. V model tako smiselno vključujemo ugotovitve partikularnih teorij in jih nadgrajujemo z medsebojnim povezovanjem ter vključevanjem njihovih kritik.

Partikularne teorije mednarodnih migracij je treba primarno osvetliti in umestiti v perspektivo dogajanja v globalnem prostoru, zato v središče analize mednarodnih migracij postavljamo teorijo svetovnih sistemov. Slednjo vidimo kot izhodišče za model, v katerega nato vključimo posamezne specifične migracijske teorije. Osnovna značilnost današnjega sveta je globalnost, življenje v svetovni družbi, kjer se nobena država ne more več zapreti pred drugimi (Beck, 2003, str. 24) in kjer so države medsebojno soodvisne, dogajanje na enem koncu sveta pa vpliva na dogajanje na drugem koncu. V takšnih razmerah je nujno preučevati svet kot celoto, oziroma povedano z Wallersteinovimi besedami, enota analize morajo biti svetovni sistemi, in ne več nacionalne države (Wallerstein, 2006, str. 25). Soodvisnost na gospodarskem področju se v današnjem globalnem ekonomskem sistemu najbolj nazorno kaže v primerih gospodarskih kriz, ki v primeru nacionalnega gospodarstva velike države v centru za seboj potegnejo celoten svet (zadnji zelo nazoren prikaz takšnih razmer je bila globalna recesija leta 2008). To vpliva tudi na migracije – v gospodarstvih v recesiji

se poveča odseljevanje (domačih in tujih delavcev) in iskanje zaposlitev v tujini, sočasno pa se na drugi strani zaradi zmanjšanja potrebe po delovni sili zmanjša priseljevanje tujih delavcev v te države. Podobno soodvisnost predstavljajo ekološki problemi, globalne klimatske spremembe, zdravstvena tveganja (najbolj očitno s pandemijo koronavirusa in bolezni covid-19). Nadalje na dogajanje po vsem svetu vplivajo politični in geostrateški interesi ter posledični varnostni izzivi, konflikti in vojne. Posledice vseh naštetih dejavnikov in procesov so vidne tudi na področju mednarodnih migracij.

Skladno z zaključki teorije svetovnih sistemov so mednarodne migracije v številnih primerih posledica globalnega kapitalizma, ki deluje tako, da omogoča uresničevanje ciljev transnacionalnih gospodarskih subjektov in držav centra (gl. Stiglitz, 2006). Wallerstein (2006) pokaže, da je treba svet razumeti z vidika delitve na jedro in periferijo. Jedrne države posedujejo ekonomski kapital, ki jim prinaša politično moč (in po potrebi tudi vojaško dominacijo), periferija pa jedru zagotavlja surovine, delovno silo in nove trge. Massey (1990) pravi, da težnje po akumulaciji kapitala vodijo v posege na trgih v državah v razvoju, kar uničuje njihove tradicionalne skupnostni in strukture in ustvarja pogoje za oz. potrebe po iskanju rešitev izven domačega okolja, tj. emigracijo, ki jo vzpodbudi načrtno rekrutiranje jedrnih držav (slednje danes poteka kar po spletu in socialnih omrežjih). Integralni del delovanja globalnega kapitalizma je tudi promocija idealizirane množične potrošnje, kar še dodatno ustvarja emigracijske imperitive v državah v razvoju. Še več, poleg ekonomskih razlogov so na delu tudi demografski izzivi, ki v starajočih se zahodnih družbah vodijo v to, da slednje aktivno novačijo delavno silo po vsem svetu, pri čemer pa želijo sočasno vzpostaviti selekcijske mehanizme za preprečevanje vstopa nezaželenim migrantom. V jedrnih državah ob tem prevladuje pričakovanje, da bodo delavci migranti prišli zgolj za določen čas (dokler bodo lahko prispevali z delom) in se nato vrnili domov. Znotraj EU je to opredeljeno kot t. i. krožne migracije. A kot pokaže analiza imigracij v Zahodno Nemčijo v 1960-ih 1970-ih, je realnost drugačna. Navkljub začetni zamisli o njihovi začasnosti so te migracije hitro postale stalne (tudi na zahtevo nemških delodajalcev, ki se niso hoteli odpovedati že usposobljeni in vpeljeni delovni sili) (Bade, 2005).

Nemčija in njena imigracijska politika, spremenjena poleti 2024, je nazoren primer jedrnega novačenja delavcev in sedaj iskalcev zaposlitve z delovnimi izkušnjami. Privabljajo jih z debirokratizacijo in priznavanjem izkušenj v domovini (Bundesregierung, 2024). Pri tem industrijsko razvite države medsebojno tekmujejo za delovno silo na globalnem in regionalnem trgu dela (Nemčija npr. računa, da bo letno privabila do 50.000 delavcev iz držav Zahodnega Balkana, ki so sočasno vir rezervne armade delavcev za slovensko, avstrijsko in hrvaško gospodarstvo).

Teorija svetovnih sistemov podaja pomemben vpogled v globalno dinamiko in delovanje politične ekonomije, vendar spregleda vlogo in pomen posameznikov ter njihovih družin pred in v migracijskem procesu. Kot pokaže Bakewell (2010), je širša družboslovna dilema o tem, kakšen vpliv imajo družbene strukture (angl. *structure*)

in posameznikovo delovanje (angl. *agency*), prisotna tudi med raziskovalci migracij. Ne glede na to, kateri pristop se nam zdi prepričljivejši, nikakor ne smemo spregledati vloge in pomena posameznika in družin v migracijskem procesu. Tudi Massey et al. (1993) opozarjajo ravno na to, da na eni strani ne smemo spregledati vpliva strukturnih dejavnikov na posameznikove odločitve, na drugi strani pa zanikati vpliva in zmožnosti samostojnega delovanja posameznika.

Teorija dejavnikov odbijanja in privlačevanja

Lee (1966) zaključuje, da v državah delujejo različni dejavniki, ki so za nekatere ljudi dejavniki odbijanja oziroma privlačevanja, sočasno pa so lahko drugi ljudje do njih indiferentni ali pa ti dejavniki na njih delujejo celo nasprotno. Kljub temu je mogoče zaključiti, da določeni dejavniki (npr. ekonomske krize, brezposelnost, nedostopnost osnovnih storitev, brezperspektivnost, korupcija, kriminaliteta, različne oblike nasilja, vojne, konflikti, okoljske in naravne katastrofe ipd.) veliko večino ljudi odbijajo, na drugi strani pa nekateri večino privlačijo (dober družbeni standard, visoka kakovost življenja, mir in varnost, dobre zaposlitvene možnosti, višji relativni dohodki, možnost osebnega uspeha in razvoja itd.). Lee je v vmesno polje med dejavnike privlačevanja in odbijanja umestil intervencijske ovire. Slednje v odločitev za migracijo vpeljejo dodatne premisleke in iskanje rešitev ter prikazujejo, da »odločitev za migracijo ni mehanična kalkulacija, ki bi nastala ob upoštevanju prisotnosti negativnih dejavnikov v emigrantski in pozitivnih dejavnikov v imigrantski družbi, temveč je treba upoštevati tudi vmesne moteče ovire« (Klinar, 1975, str. 19). Te ovire so lahko geografska razdalja in s tem povezani finančni stroški, izguba časa, nevarnosti na poti ipd. V ciljni državi so lahko sočasno prisotni dejavniki privlačevanja in odbijanja (npr. boljše zaposlitvene možnosti za priseljence, večja priseljska skupnost, vendar sočasno težavna pot do ciljne države, porast nestrpnosti in nasilja).

Teorija dejavnikov odbijanja in privlačnosti je bila deležna številnih kritik, ki so ji očitale predvsem poenostavljanje in pomanjkanje potrditve z empiričnimi podatki. De Haas (2021) zaključuje, da ta teorija temelji na intuiciji in da ni zmožna pojasniti migracijskih procesov oziroma celo več, da je pri tem zavajajoča. Po njegovem mnenju zgolj niza številne dejavnike, ki sicer imajo določeno vlogo pri migracijah, ne poda pa razlage njihovih medsebojnih povezav in pojasnila o vplivu družbenih procesov, ki vplivajo na migracije. Bučar Ručman (2014) navaja, da bi na osnovi te teorije pričakovali, da se za emigracijo odloči večina ljudi v deprivilegiranih družbah, ki bi jih razmere potisnile v selitev, pri čemer pa empirični podatki kažejo drugače. V raziskavi med slovenskimi priseljenci na Švedskem je Lukšič Hacin (1999, str. 144–15) zaključila, da za odločitev o odselitvi ni dovolj le nezadovoljstvo v domovini (dejavnik odbijanja), temveč mora biti posameznik kot osebnost takšen, da si upa narediti ta korak. Dejavnike na ravni posameznika omenjena teorija popolnoma spregleda.

Neoklasična makro- in mikroekonomska teorija migracij

Neoklasična makroekonomska teorija migracij predpostavlja, da so mednarodne migracije posledica razlik na trgu dela, predvsem v višini plač med posameznimi državami. Ključen dejavnik, ki ljudi motivira k migraciji, so slabe plače doma in dobre v tujini. Uporabnost te teorije v oblikovanem modelu je še bolj nazorna z razširitvijo z neoklasično mikroekonomsko teorijo. Ta predpostavlja, da posameznik racionalno pretehta odločitev za migracijo, pri čemer upošteva oteževalne dejavnike (stroške potovanja, življenjske stroški v tujini, vprašanje realne možnosti pridobitve zaposlitve, napore pri učenju novega jezika) in jih primerja s prednostmi, ki jih prinaša migracija (pričakovani višji dohodek, možnost zaposlitve itd.) (Massey et al., 1993).

De Haas (2021) navaja, da funkcionalistični pristop neoklasične teorije sicer razmeroma dobro pojasni migracije visoko usposobljenih migrantov, medtem ko je za manj usposobljene in relativno revne migrante – katerih regularne možnosti selitev so pogosto zelo omejene – ta teorija neustrezna in je njihove migracije mogoče bolje pojasniti s konfliktnimi in neomarksističnimi teorijami. Goss & Lindquist (1995) pokažeta na še eno težavo tega pristopa, in sicer, da razume priseljence zgolj kot delovno silo, pri tem pa spregleda politične in druge strukturne ovire mobilnosti. Ravno slednje imajo velik vpliv na mednarodne migracije in zmožnost vključevanja priseljencev na trg dela v deželah gostiteljicah. Strukturni dejavniki, na katere ključno vplivajo nacionalne države, gospodarstvo (delodajalci), mednarodne organizacije (npr. UNHCR, IOM) »aktivno oblikujejo migracijske procese in oblikujejo nove migracijske vzorce« (De Haas, 2021, str. 7; poudarek v izvirniku). Podobno kritiko te teorije predstavi tudi Kurekova (2009), ki izpostavi, da ta pristop izključuje vpliv političnih odločitev in politik na migracije, da ne uspe pojasniti, zakaj (številni) ljudje v okoliščinah, ki jih opisuje ta teorija, ne migrirajo, in da spregleda tudi težave na trgu dela. Ugotovitve o vplivu strukturnih dejavnikov na emigracijo Kurekova (2013) analizira tudi na konkretnem primeru, kjer pokaže, da sta imela restriktivna socialna politika in neuspešno reševanje brezposelnosti v državah srednje in vzhodne Evrope pomembno vlogo pri spodbujanju emigracije iz teh držav.

Ugotovitve teorije nove ekonomije migracij (Stark & Bloom, 1985; Taylor, 1999) so prinesle pomembno dopolnitev in zaključile, da odločitve za migracijo niso sprejete na ravni posameznika, temveč vključujejo družinske člane in gospodinjstva. Migracija je strategija družine. Poleg dviga absolutnega dohodka priseljenca na migracije vpliva tudi relativna deprivacija, ki jo gospodinjstvo odpravi s pošiljanjem družinskega člana na delo v tujino. Denar in druge oblike pomoči, ki jo migranti pošiljajo domov, tako niso znak altruizma, ampak realizacija dogovora v družini (Stark & Taylor, 1989). Dodatno so migracije uporabljene za zmanjšanje ekonomskega tveganja ob povečanju brezposelnosti doma (Stark & Bloom, 1985). Ob tem se pogosto zgodi, da na začetku načrtovana začasna emigracija po vzpostavitvi trdnih družbenih vezi v novem okolju, uspešni vključitvi na trg dela, združitvi družine ali

oblikovanju družine v novem okolju postane stalna. Pri tem moramo upoštevati tudi kulturne specifike posameznih družb, kjer ni nujno, da je odločitev znotraj družine sprejeta soglasno oz. s privolitvijo osebe, ki odhaja oz. ne sme oditi v tujino. Kot pokaže Gombač (2005), so v Istri v patriarhalnih družinah o migracijah družinskih članov odločali očetje.

Teorija migracijskih mrež in teorija migracijskih sistemov

Migrante, nekdanje migrante in nove potencialne migrante povezujejo v izvornih in ciljnih državah različne neformalne vezi, ki tvorijo njihov socialni kapital. Teorija migracijskih mrež poudarja, da ima socialna mreža ključno vlogo pri pridobivanju zaposlitev za nove migrante, poleg tega pa vpliva na zmanjšanje stroškov migracij in zmanjšanje tveganja (Massey et al., 1993). (Naj)večje breme migracije prevzemajo prvi migranti. Ti si morajo v novih okoljih zagotoviti namestitev in zaposlitev ter ugotoviti, kako delujejo birokratski sistem, nadzor, transport, oskrba s hrano, zdravstvena oskrba itd. Z drugimi besedami, zagotoviti si morajo vse potrebno za življenje. Novim migrantom, ki imajo vzpostavljene vezi s sorodniki, prijatelji, znanci, ki so te težave že premostili, je bistveno lažje. Socialna mreža jim pomaga z informacijami o samem poteku migracije in o pasteh na poti, z nastanitvijo, pridobivanjem zaposlitve in drugimi nasveti za lažje življenje v novem okolju, dodatno pa potencialnim migrantom pomaga tudi s finančno pomočjo (npr. posojilom za plačilo potnih stroškov) (Koser, 2007). Migracije tako sčasoma postanejo proces, ki dobi svoj zagon in reproducira vzorce (De Haas, 2021), zato jih je po prekoračitvi določene točke s klasičnimi ukrepi na kratek rok skoraj nemogoče ustaviti.

Sha (2021) predstavi kritičen pogled na teorijo migracijskih mrež. Poudarja, da je poleg vseh pozitivnih vplivov migracijskih mrež na prihajajoče migrante treba poznati tudi negativne. Med njimi navaja izključevanje tistih, ki ne pripadajo »naši« skupini, pritisk na člane »naše« skupine priseljencev in omejevanje svobode, preprečevanje integracije v gostujočo družbo, oviranje dostopa do virov, omejevanje dostopa do trga dela v gostujoči družbi, izkoriščanje novih priseljencev, zlasti, če so ti v novi državi neregularno, širjenje lažnih informacij in predstavljanje popačene slike o življenju v tujini.

Teorija migracijskih sistemov razširi vpogled v migracijske procese in vanje vključi makrosociološke dejavnike. Migracije potekajo med državami, ki so že povezane z različnimi vezmi – kolonizacijo, političnim sodelovanjem, trgovino, investicijami, kulturnimi vezmi (Castles & Miller, 2009, str. 27). Migracije torej ne potekajo med dvema naključnima državama, temveč med državama, ki sta na določen način že povezani. Pomembnejše kot geografska bližina so vezi med njima. Migracijski tokovi namreč odražajo politične, družbene in ekonomske odnose, in ne fizične povezanosti (Massey et al., 1993).

Teorija dvojnega trga dela

Vprašanje vključevanja migrantov na trg dela pojasnjujejo nekatere že opisane teorije, dodatne, tudi nasprotujoče razlage pa je mogoče najti v teoriji dvojnega trga dela. Ključna predpostavka te teorije je, da mednarodne migracije niso posledica racionalnih odločitev posameznikov, temveč izhajajo primarno iz potrebe po poceni »delovni sili« v industrijsko razvitih državah. V ospredju niso dejavniki odbijanja v državah izvora, temveč dejavniki privlačenja v ciljnih državah (Massey et al., 1993). Castles & Miller (2009) in Massey (2015) pravijo, da ta teorija ugotavlja, da so migracije posledica strukturnih dejavnikov, ki delujejo v sodobnem kapitalizmu. Delodajalci si prizadevajo pridobiti čim cenejšo delovno silo, in v primerih, ko se srečajo s pomanjkanjem interesa med domačimi delavci za delo v določenih poklicih, ne posežejo po ukrepih, ki bi slednje pritegnili (npr. višje plačilo in druge bonitete), temveč aktivno novačijo delavce v tujini, ki so se pripravljene vključiti na trg dela tudi za nižje plače. Utemeljitelj teorije dvojnega trga dela, Michael J. Piore (2008), pokaže, da se domači delavci srednjega razreda večinoma zaposlujejo v poklicih na t. i. primarnem trgu dela, kjer opravljajo zahtevnejša dela, za katera sta potrebna znanje in usposobljenost, revnejši delavci – med katerimi so pogosto priseljenci in njihovi potomci – pa so na drugi strani zaposleni v poklicih, ki vključujejo fizično zahtevna, naporna in začasna dela. Zanje ni treba imeti posebnih znanj oz. se jih lahko hitro priučijo. Dodatno Piore (2008) poudari, da delodajalci s pomočjo diskriminacije omejujejo delavcem vstop na primarni trg dela, s čimer povečujejo obseg delovne sile, ki deluje na sekundarnem trgu dela, in preprečujejo rast njihovih plač. Imigrantski delavci so tudi lažje zamenljivi, v primeru gospodarske stagnacije in finančnih težav pa so prvi, ki jih delodajalci odpustijo (Massey et al., 1993).

V kritiki te teorije Kurekova (2009) izpostavlja pristranski pogled na vloge držav gostiteljic, ki izključuje razumevanje dejavnikov odbijanja v izvornih državah in pripisuje prevelik pomen formalnemu novačenju delavcev. Prav tako ta pristop ne more pojasniti razlik v obsegu migracij v različnih ekonomsko razvitih državah s podobnimi ekonomskimi razmerami. Kritike te teorije so tudi metodološke, saj Kurekova pravi, da je razlikovanje med primarnim in sekundarnim sektorjem največkrat arbitrarno, kar vodi v težave pri empiričnih ocenah.

Neomarksistična in druge konfliktne teorije migracij

Neomarksistične teorije poudarjajo vlogo velikega kapitala in držav, ki zastopajo njegove interese, pri oblikovanju in upravljanju mednarodnih migracij. Migracije – tako prostovoljne kot prisilne – zagotavljajo poceni delovno silo, ki jo je mogoče izkoriščati. Vzpostavljane različnih statusov, določanje posebnih pogojev za vstop na trg dela, pomanjkanje nadzora nad kršitvami delavskih pravic in neustrezna zakonodaja so odraz neenake družbenopolitične moči in omogočajo uresničevanje interesov in ciljev kapitala (Bučar Ručman, 2014; Kanduč & Bučar Ručman, 2016).

Največjo korist od migracij in prihoda poceni delovne sile (regularnih kot tudi neregularnih delavcev migrantov) ima veliki kapital. Neomarksistične teorije vidijo v migracijskih pravilih, protipriseljenskem političnem diskurzu, managementu migracij in nadzoru mej spektakel (Andersson, 2014), ki daje občutek nadzora, dejansko pa gre za zagotavljanje pogojev za »ustvarjanje« poceni delovne sile z minimalno možnostjo zaščite pred izkoriščanjem.

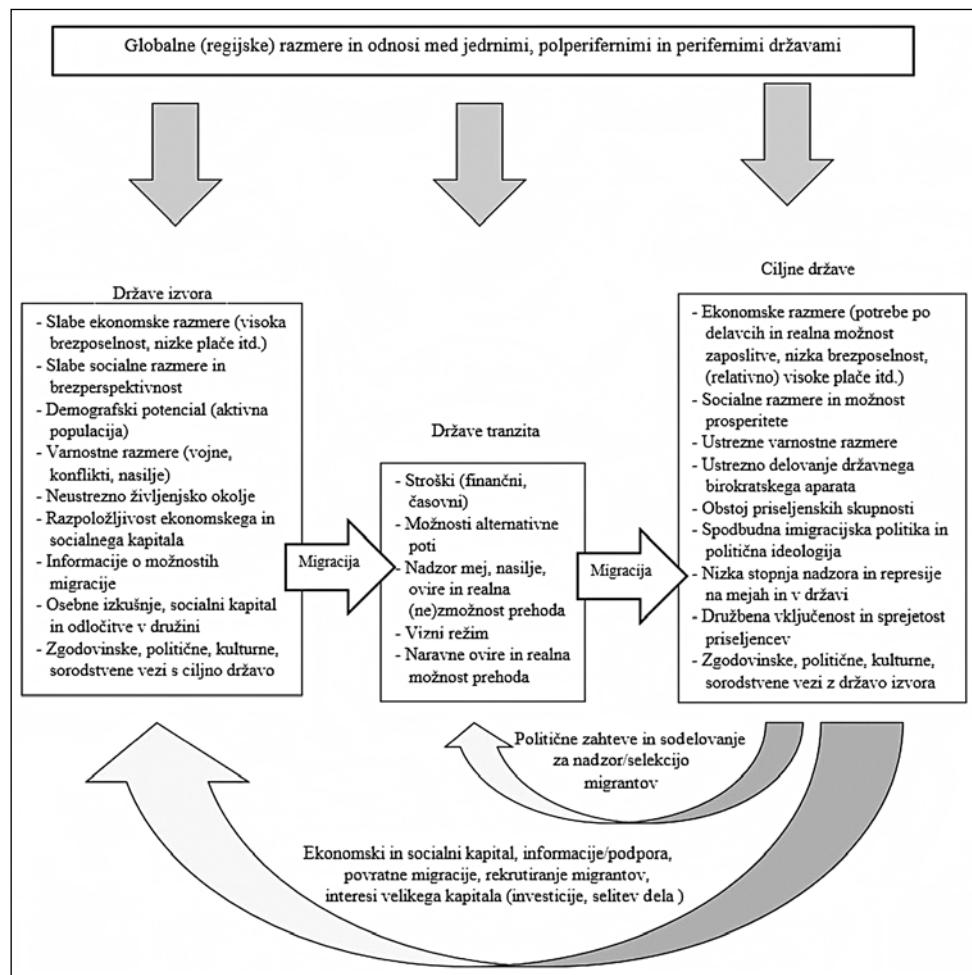
Kritičen pogled na te teorije izpostavlja predvsem pomanjkanje razumevanja vloge posameznika in družin pri migracijah, pa tudi to, da lahko priseljenci z migracijo sebi in potomcem zagotovijo boljše pogoje in višjo kakovost življenja. Nazoren primer takšne migracije opisujejo Gêdeshi et al. (2024), ki pokažejo, da se več kot polovica zdravnikov, ki so emigrirali iz Albanije, ne želi vrniti nazaj v domovino. Vzroki za takšno odločitev le delno izhajajo iz višine dohodka, v večji meri pa nanjo vplivajo slabi delovni pogoji, nezmožnost napredovanja v karieri in razširjenja korupcija.

Teorija prisilnih migracij

Posebno obliko migracij predstavljajo prisilne migracije, ki se od drugih razlikujejo predvsem po tem, da pri njih dejavniki odbijanja prevladujejo nad dejavniki privlačevanja (Klinar, 1993, str. 615). Pri teh migracijah se ljudje v skupinah ali posamično odločijo za selitev – oziroma so vanjo prisiljeni – zaradi reševanja svoji življenj ali preprečitve ogrožanja zdravja, preganjanja, ujetništva, trpinčenja, mučenja. Mandić (2022) pravi, da so prisilni migranti razseljeni zaradi nasilja, ki je lahko selektivno (npr. pregon, etnično čiščenje) ali splošno (npr. vojna, anarhija). V te kategorije po njegovem mnenju spadajo civilni in vojni ujetniki, žrtve trgovine z ljudmi v vojnah, begunci, prosilci za azil in notranje razseljene osebe. Mandić zagovarja, da je treba pri prisilnih migracijah v ospredje postaviti (človeško) prisilo, zato vanje ne vključuje drugih oblik migracij, kjer so ljudje prisiljeni zapustiti določeno ozemlje. Barbič (1992) pravi, da pri begunskih migracijah »na neki način gre za fizično prisilo, da zapustijo svoje domove in si drugje poiščejo zatočišča«. Mežnarič (2003) razširi ta pogled in poleg človeškega dejavnika med vzroke za prisilne migracije vključi tudi naravo. Skladno s tem pogledom med prisilne migracije – poleg že omenjenega bega pred nasiljem, vojno ali oboroženimi spopadi –v eklektični model vključimo tudi migracije v primerih naravnih in okoljskih katastrof (npr. jedrski nesreči v Černobilu in Fukušimi, izbruhi vulkanov, cunamiji, poplave, suše, potresi, dvig gladine morja itd.).

V primerih, ko je vzrok za prisilno mednarodno (meddržavno) migracijo vezan na »utemeljen strah pred preganjanjem, osnovanem na rasi, veri, narodni pripadnosti, pripadnosti določeni družbeni skupini ali določenem političnem prepričanju«, so begunci (formalno) zaščiteni s Konvencijo o statusu beguncev in Protokolom h konvenciji o statusu beguncev (UNHCR, 2010). Vendar se pogoji za dodelitev statusa begunca v državah EU v zadnjih desetletjih vedno bolj zaostrejujejo. Države uvajajo nova pravila in omejitve (npr. enostranska razglasitev varnih izvornih držav ali celo varnih delov držav; pravilo varne tretje države) (Bade, 2005; Andersson, 2014; Jones,

2016) – tako je EU za varne tretje države razglasila sosednje države, v katere so vrnjeni potencialni prosilci za azil, ki so prišli iz oziroma preko njihovega ozemlja. Pri tem države EU tesno sodelujejo z državami, v katerih so pogosto kršene človekove pravice (Andersson, 2014). Leta 2022 se je jasno pokazala izjema, pri kateri je postalo jasno, da lahko države EU in tudi nekatere druge (npr. Japonska, Velika Britanija) ravna drugače, tj. begunci iz Ukrajine.



Slika 1: Shema eklektičnega modela teorije migracij.

Analiza prisilnih migracij odpira tudi kritičen pogled na družbeno-politično prakso, saj načenja tudi vprašanje diferenciacije med prisilnimi in prostovoljnimi migracij. Kot je že pred desetletji zapisal Klinar (1975, str. 41), »prostovoljne [ekonomske] migracije niso tako prostovoljne, kot se to navidezno kaže«, saj se poleg dejavnikov privlačevanja »pojavi tudi pomembni dejavniki potiskanja iz emigrantske družbe, ki odsevajo določene neprostovoljne pritiske«. De Haas (2021) pravi, da je treba

razlikovati med sledečimi koncepti prisilne mobilnosti: zavestnim dejanjem bega pred zunanjimi grožnjami in nasiljem, begom pred ogrožanjem preživetja in revščino ter dobesedno prisilno emigracijo v obliki deportacije, izselitve, zaslužnjenja. V prvem primeru imajo begunci še vedno možnost odločanja o svojih dejanjih, medtem ko v slednjem te možnosti nimajo. Ob tem pa velja upoštevati še ugotovitev Jonesa (2016, str. 35), da je »v sedanjem sistemu [...] begunec, ki beži pred političnim pregonom, bolj upravičen do zaščite in pomoči kot migrant, ki beži pred življenjem v umazanem, prenapolnjenem, z boleznimi okuženem in nevarnem slumu, kjer nima druge možnosti, kot da v izkoriščevalskih razmerah dolge ure dela za mizerno mezdo«. Njegovo avtonomno dejanje (dejansko neregularni odhod) namreč spodkopava red globalnega kapitalističnega sistema in njegove trenutne distribucije moči.

APLIKACIJA EKLEKTIČNEGA MODELA ZA ANALIZO MIGRACIJ V SLOVENIJO IZ TER PREKO DRŽAV NEKDANJE SFRJ

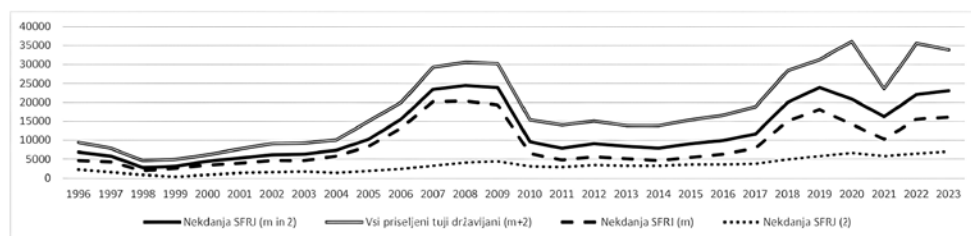
V migracijskem gibanju v Sloveniji vse od 1970-ih let prevladuje priseljevanje nad odseljevanje – selitveni prirastek je bil negativen zgolj v letih 1991–92, 1998, 2010 in 2014 (SURS, 2024g). Priseljenci so v veliki večini prihajali iz drugih republik oz. po letu 1991 držav nekdanje SFRJ. Z nastankom novih držav se je spremenil tudi formalnopravni status priseljencev. Pred osamosvojitvijo so bile to notranje migracije in migranti so imeli vse formalne pravice svoje domovine, v obdobju po osamosvojitvi in vstopu Slovenije v EU pa so migranti iz istih delov nekdanje skupne države SFRJ postali tujci in z besedami EU »državljeni tretjih držav« (z izjemo Hrvaške po letu 2008, ko se je pridružila EU). Zanje so dolga leta veljala drugačna pravila že pri prehajanju državne meje (vize za vstop v EU so bile za državljane BiH odpravljene leta 2010, nazadnje, leta 2024, pa še za državljane Kosova), vsi pa se soočajo z drugačnimi pogoji pri vstopu na trg dela in pridobitvi pravice do bivanja.

Slovenija kot manjša država v globalnem prostoru šele pričenja s tekmo za globalno rezervno armado delavcev, a v odnosu do držav na teritoriju nekdanje SFRJ, zlasti BiH, Srbije, Kosova, in Severne Makedonije, si je že ustvarila pozicijo regionalne jedrne države. O razlikah v delovanju gospodarstva pričajo različne stopnje brezposelnosti. Ta je bila v Sloveniji v času recesije nižja kot v najboljših obdobjih v BiH, Severni Makedoniji in na Kosovu. V drugih državah nekdanje SFRJ je stopnja brezposelnosti 2–3 krat višja kot v Sloveniji (World Bank, 2024). Iz teh držav v Slovenijo prihajajo nizko kvalificirani delavci, študenti in tudi strokovnjaki. Na srečanju strokovnjakov s področja migracij (2023) so bile izpostavljene ugotovitve, vezane na teorijo svetovnih sistemov. Ena izmed sogovornic je poudarila:

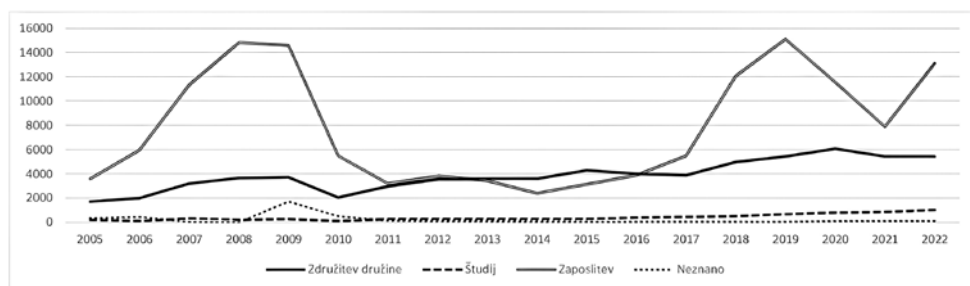
Slovenija v globalnem prostoru zaseda mesto polperiferije, ki v »jugoslovanskem« prostoru rekrutira ljudi od strokovnjakov do nekvalificiranih sektorjev, od katerih smo odvisni. V Sloveniji se o tem pogovarjamo, kot da smo dobra država, ki pomaga pri razvoju

manj razvitih prostorov Jugoslavije, v resnici pa gre za zadovoljevanje potreb našega gospodarstva. (Strokovnjakinja in raziskovalka mednarodnih migracij, 17. 10. 2023)

O vlogi držav na območju nekdanje SFRJ v migracijskem sistemu Slovenije pričajo podatki SURS o priseljevanju. Kot je razvidno iz Grafa 1 spodaj, pri priseljevanju v Slovenijo velik delež vseh priseljencev zavzemajo ravno državljani teh držav (njihov delež znaša v zadnjih 20 letih 56–76 % vseh priseljencev). Podatki tudi nazorno kažejo, da med priseljenimi prevladujejo moški, porast njihovega priseljevanja pa je povezan z ekonomskimi razmerami in potrebami slovenskega gospodarstva po delovni sili. Iz Grafa 2 je razvidno, da so razlogi za največji delež migracij ekonomski (zaposlitve). Število priselitev z namenom združevanja družin je navadno 3–4-krat manjše, zaposlitvene vzroke pa je preseglo zgolj na vrhuncu recesije v Sloveniji (2013–2015). Dve obdobji razcveta slovenskega gospodarstva (2004–2008 in po letu 2017) sta vodili v veliko potrebo po delovni sili. Slovenski delodajalci so v teh obdobjih aktivno novačili delavce v državah nekdanje SFRJ. Po podatkih SURS (2024d) je bilo maja 2024 v Sloveniji skoraj 946.700 delovno aktivnih oseb (brez kmetov), pri čemer je bil delež tujih državljanov 15,8 % (malo manj kot 146.400 oseb), kar predstavlja najvišje število in najvišji delež od začetka merjenja tega podatka. Več kot polovica delovno aktivnih tujih državljanov je bila zaposlenih v gradbeništvu in predelovalnih dejavnostih. Največ moških delovno aktivnih tujcev je opravljalo poklice v kategoriji voznikov težkih tovornjakov in vlačilcev (približno 16.200), pri tujih državljankeh pa so bil najpogostejši poklici v kategoriji čistilk, strežnic in gospodinjskih pomočnic v uradih, hotelih in drugih ustanovah (nekaj manj kot 5.000) (SURS, 2024e). Podobno pomembno vlogo imajo države na tleh nekdanje SFRJ pri migracijah študentov v Slovenijo. Iz podatkov SURS (2022) je razvidno, da Slovenija v največjem deležu privlači študente iz teh držav. Leta 2022 je bilo v Sloveniji glede na državo državljanstva 8.553 tujih študentov. Ti so prihajali iz več kot 120 držav, pri čemer močno izstopajo štiri države, iz katerih je bilo na študiju v Sloveniji vpisanih po več kot 1.000 študentov. Vse izmed njih so bile del nekdanje SFRJ: Bosna in Hercegovina (18 % vseh tujih študentov), Hrvaška (18,4 %), Severna Makedonija (17,9 %) in Srbija (17,7 %). Kot je prikazano na Grafu 2, število študentov iz držav nekdanje SFRJ narašča in je v zadnjih letih na letni ravni 4–5 krat višje kot pred 20 leti.



Graf 1: Priseljevanje v Slovenijo (vir: SURS, 2024c).



Graf 2: Priseljenci v Sloveniji iz nekdanje SFRJ (brez Severne Makedonije zaradi nedostopnosti podatkov) glede na namen priselitve (vir: SURS, 2024f).

Kljub temu, da uradni podatki priseljavanja do leta 2022 (SURS, 2024b) ne kažejo upada priseljavanja iz nekdanje SFRJ, je več strokovnjakov (tako na posvetu leta 2023 kot na sestankih skupine za pripravo Strategije Vlade RS na področju priseljavanja) izpostavilo, da se delavci iz držav na ozemlju nekdanje SFRJ vedno bolj odločajo za zaposlovanje v Avstriji in Nemčiji, Slovenija pa je vedno bolj le tranzitna država. Po mnenju sogovornikov so imele pri tem pomembno vlogo neustrezna politika na področju priseljavanja in birokratske ovire, spregledati pa ne smemo tudi drugih dejavnikov, ki zadevajo področja neoklasične makroekonomske teorije (npr. razlike v višini plač, višji standard življenja), izboljšanje transporta in prometnih povezav, obstoj široke mreže priseljencev v teh državah, aktivno novačenje držav znotraj iste skupine potencialnih migrantov ter negativne izkušnje delavcev migrantov z zlorabami delodajalcev v Sloveniji. Sogovornik je na posvetu strokovnjakov izpostavil, da globalni tokovi zagotavljanja delovne sile intenzivno opravljajo svoje delo. Največji preskok se kaže pri delavcih iz Indije in Bangladeša, na Hrvaškem tudi iz Filipinov. Sedaj so številke nizke, vendar je mogoče napovedati trend rasti, ki ga bomo v naslednjih letih zaznali tudi pri nas. Sogovornik je nazorno opisal poseben položaj indijskih delavcev:

Indijski delavec mora v povprečju plačati 10.000 dolarjev, da lahko sploh pride v Slovenijo in začne tu delati. Delujejo agencije z dobrimi povezavami na Hrvaškem, kar se raztegne do Slovenije. Dodatno se plača posredniku na Hrvaškem in posredniku v Sloveniji. Tudi ta »ekonomski model« se bo eksponentno povečal zaradi vedno večjega števila takšnih delavcev. Ti ne morejo iti nazaj, ker nimajo kam iti. Indijski delavci se tudi ne obrnejo na institucije, ko gre za kršitve. Tiha ekonomija v transportu, v skladiščih, v restavracijah, gostilnah. Ti delavci grejo pogosto naprej, na primer na Portugalsko. (Strokovnjak s področja dela delavcev migrantov, 17. 10. 2023)

Posebno potrditev predpostavk teorije svetovnega sistema lahko najdemo v zaključkih razprave posveta strokovnjakov (2023), kjer je bilo poudarjeno, da je globalni ekonomiji uspelo uzakoniti kapitalu ustrezen in vsečen način obravnave ljudi in migracij. Izkoriščanje ekonomske neenakosti in socialnih stisk ljudi v izvornih

državah je zakonsko dovoljeno, tolerirano in celo spodbujano, saj predstavlja temelj delovanja današnjega kapitalističnega sistema. Ob tem ni presenečenje, da so ravno najranljivejše kategorije delavcev migrantov izpostavljene največjim izkoriščanjem, ki se po svoji intenziteti le še stopnjujejo. Če smo se pred leti zgražali nad praksami izkoriščanja delavcev migrantov v gradbeništvu (Medica et al., 2011; Bučar Ručman, 2014; Frangež & Bučar Ručman, 2017), smo v preteklih letih dobili nadgradnjo in prve znane primere tovarn potilnic (angl. *sweatshop*) pri nas – npr. predelovalnica rib, v kateri so delavci prebivali in delali v nemogočih pogojih (Carl, 2022), in izkoriščanje delavcev v avtopralnici (Ponudič & Luzar, 2022).

Razumevanje migracij z vidika teorije svetovnih sistemov je bilo izpostavljeno tudi na sestankih delovne skupine vlade za pripravo Strategije Vlade Republike Slovenije na področju migracij (2022–2024). V ospredje diskusij in tudi v besedilo končnega dokumenta je prišla potreba po tujih delavcih, kjer je bilo izpostavljeno, da Slovenija ne more več računati zgolj na novačenje delavcev v državah Zahodnega Balkana, temveč mora poiskati nove države. Podobno je že storila Hrvaška. Tudi Strategija Vlade RS na področju priseljevanja (Vlada RS, 2024, str. 17) navaja, da »bo za zagotovitev vzdržnega zagotavljanja ustrezne delovne sile v prihodnosti treba razširiti krog držav, iz katerih se priseljujejo tuji delavci, tudi zunaj regije Zahodnega Balkana«, kot potencialne države pa so omenjeni Filipini, Argentina, Turčija.

Ekonomске teorije podajajo omejen vpogled v vzroke za migracije in jih je treba dopolniti. Njihova izhodiščna težava je, da predpostavljajo racionalno odločanje posameznika za migracijo, to pa je pogojeno z zelo dobro obveščenostjo potencialnih migrantov o razmerah v potencialni emigrantski družbi. Danes je z razvojem sodobnih informacijsko-komunikacijskih tehnologij, interneta in družbenih omrežij informiranje o razmerah v potencialni ciljni državi že pred odhodom in tudi na sami poti bistveno lažje in hitrejše, kot je bilo v preteklosti (Frouws et al., 2016). Ti zaključki so bili izpostavljeni na sestankih delovne skupine vlade za pripravo Strategije Vlade Republike Slovenije na področju migracij (2022–2024), sestanku strokovnjakov s področja migracij (2023) kot tudi na sestankih v BiH (sestanek s predstavnikom IOM, s predstavniki UNHCR ter s predstavnico nevladne organizacije INTERGreat, vse v letu 2022). Internet je postal tudi pomembno sredstvo za novačenje in spodbujanje priseljevanja – tako regularnih kot neregularnih migracij. Objave na socialnih omrežjih lahko sprožijo verižno reakcijo na področju migracij (npr. sebek nekdanje nemške kanclerke Angele Merkel s prosilci za azil in njegovo množično deljenje).

Prostor nekdanje SFRJ je vse od razpada države v začetku 1990-ih letih intenzivno povezan z begunskimi migracijami. Vojne na ozemlju nekdanje SFRJ so vodile v najboljše begunske migracije v evropskem prostoru konec prejšnjega stoletja. V obdobju 1991–1995 in nato leta 1999 je prišlo do emigracij več kot 3,7 milijona ljudi, napetosti med narodi pa so se sprevrgle celo v etnično čiščenje in genocid, ki je še dodatno spodbudil beg ljudi (gl. Bučar Ručman, 2020). Poleg beguncev iz nekdanje Jugoslavije v 1990-ih letih je prostor nekdanje države zaznamoval tudi prehod beguncev iz Sirije, Iraka in Afganistana. Od druge polovice leta 2014 dalje je

število sirskih beguncev v Evropi preseгло 930.000. Od oktobra 2015 do marca 2016 je v tem gibanju prešlo Slovenijo nekaj manj kot pol milijona ljudi (Bučar Ručman, 2018). Največ prošenj za azil v evropskih državah je bilo vloženih v Nemčiji (0,5 milijona) in na Švedskem (0,1 milijona) (UNHCR, 2017). Pot beguncev in drugih migrantov v severno-evropske države je vključevala tihotapce, ki so s čolni prevažali ljudi iz Turčije na grške otoke, ti pa so potem nadaljevali pot preko Grčije, Severne Makedonije, Srbije in Madžarske. Ko je slednja vzdolž celotne meje s Srbijo in nato Hrvaško postavila ograjo ter zaostрила nadzor in sankcije, se je pot preusmerila preko Hrvaške v Slovenijo in od tukaj proti severu. Postalo je očitno, da begunci sicer lahko pridejo v Evropo, vendar morajo najprej tvegati življenje na morju, nato pa se na naslednjih več tisoč kilometrih prebijati po cestah, ostajati v negotovosti in prestajati ponižanja na nadzornih točkah. V tistem času smo bili priče nedvoumnemu primeru sekuritizacije in militarizacije upravljanja (begunskih) migracij, kar je na koncu povzročilo moralno paniko in spremenilo razumevanje begunskih migracij v Sloveniji in Evropi (Bučar Ručman, 2018).

Ruska agresija na Ukrajino in vojna, ki je sledila, sta sprožili več milijonov beguncev, ki iščejo zatočišče v državah v regiji (in tudi širše), in še večje število notranje razseljenih oseb. Po podatkih Eurostata (2024) je bilo leta 2024 v EU registriranih 4,2 milijona beguncev iz Ukrajine. Aprila 2024 je bilo v Sloveniji 8.990 ukrajinskih beguncev z začasnim zatočiščem. Odprtost mej za ukrajinske begunce, reakcije držav in politična retorika, ki soglasno kliče k humanitarnosti, pomoči, podpori, so v primerjavi z razmerami izpred nekaj let popolnoma drugačne. Sirski begunci so lahko prešli čez mejo in nato potovali skozi državo samo znotraj vojaško in policijsko nadzorovanega koridorja, medtem ko imajo ukrajinski begunci odprte meje, policisti pa popolnoma drugačna navodila. Prevoz ukrajinskih beguncev skozi državo je oproščen plačila cestnine. Na meji jih ne pričakajo pripadniki posebnih policijskih enot in vojaki z dolgocevnim orožjem, meja, s katere prihajajo, tudi nima bodeče žice (Bučar Ručman, 2022). Otroci z začasno zaščito imajo pravico do vrtca (v določenih primerih brezplačnega), učenci imajo pravico do brezplačne malice, kosila in prevoza, dijaki prav tako do brezplačne malice. Odraslim osebam so omogočeni vstop na trg dela, denarna pomoč za zasebno nastanitev, denarna pomoč ali žepnina, (nujna) zdravstvena oskrba, združevanje družine itd. (Vlada RS, 2022).

Predstavnica nevladne organizacije v Sarajevu, ki nudi oskrbo ljudem na t. i. Balkanski poti, je v pogovoru (22. 10. 2022) pojasnila, da je v letu 2022 pot ljudi proti EU potekala preko Turčije, Bolgarije, Srbije, Bosne in Hercegovine, Hrvaške, Slovenije in nato proti severu. Velika večina ljudi je prihajala iz Afganistana, tem pa so se pridružili tudi ljudje, ki so prišli zakonito in brez viz neposredno v Srbijo (npr. iz Kube, Indije), nato pa so nadaljevali pot proti EU. Predstavniki nevladne organizacije in tudi predstavniki UNHCR so potrdili, da je bila pretekla praksa številnih nezakonitih prisilnih vračanj (angl. *pushbacks*) iz Hrvaške v BiH prekinjena oz. se je bistveno zmanjšala, kar je razvidno tudi iz poročila organizacije Danish Refugee Council (2024). IOM (2024) v poročilu za Zahodni Balkan navaja, da je bilo januarja 2024 med 2.178 osebami, ki so bile vključene v njihovo raziskavo, največ oseb iz Sirije (43 %),

Afganistana (22 %) in Maroka (16 %). Med ciljnim državami vseh anketirancev je bila na prvem mestu Nemčija (57 %), sledile so Italija (14 %), Francija (8 %) ter Nizozemska, Belgija in Avstrija (po 4 %) (IOM, 2024). O poteku poti preko Hrvaške (in pred tem drugih držav na Balkanu) v Slovenijo in nato proti severu pričajo tudi podatki slovenske policije o neregularnih migracijah. V letu 2023 je bilo na vseh notranjih mejah evidentiranih 60.587 neregularnih vstopov, od tega 96 % na meji s Hrvaško. Med obravnavanimi osebami so bili najpogostejše državljani Afganistana (30 %), Maroka (15 %), Pakistana (9 %), Bangladeša, Rusije in Sirije (po 6 %), Turčije (5 %) ter Indije (3 %) (Uprava uniformirane policije, 2024). Glede na države izvora in tudi podatke IOM lahko vidimo, da po tej poti potekajo globalne migracije oseb, ki drugače ne morejo regularno vstopiti v EU, pri tem pa nekateri prihajajo iz držav z vojnami in konflikti, drugi pa iz držav z veliko ekonomsko neenakostjo, slabimi socialnimi razmerami in brez upanja za izboljšanje svojega položaja doma.

Po letu 2015 se v Sloveniji povečuje število vloženih prošenj za azil (leta 2023 jih je bilo 7.261), a kot je navedeno v Strategiji Vlade RS na področju priseljevanja (Vlada RS, 2024, str. 7), je Slovenija glede na statistične podatke predvsem tranzitna država za osebe, ki pri nas prosijo za zatočišče (izjema so begunci iz Ukrajine). Izrazito visok delež prosilcev za mednarodno zaščito namreč Slovenijo po nekaj dneh zapusti. V letu 2023 so 79 % vseh vloženih prošenj vložili državljani Maroka, sledili so državljani Alžirije, Pakistana in Indije. V obdobju med letoma 2002 in 2015 je bilo povprečno 25 ugodenih prošenj za azil na leto, v obdobju 2016–2022 pa povprečno 117 (SURS, 2023). Glede obravnave begunskih migracij v Sloveniji je bilo na sestanku strokovnjakov s področja migracij (17. 10. 2023) izpostavljeno, da imamo v Sloveniji težavo, ker v trenutnih razmerah – tlakovanih tudi z ustvarjanjem moralne panike ob prehodu beguncev leta 2015 – nobena lokalna skupnost ni pripravljena sprejeti tujcev. Spomladi 2024 se je to nazorno pokazalo tudi v protestih lokalnih skupnosti, kjer naj bi bile urejene namestitve prosilcev za azil. Posledično država ni sposobna izpolnjevati svojih osnovnih dolžnosti za zaščito beguncev. Med prosilci za azil so pogosto tudi t. i. ekonomski migranti, osebe, ki ne dobijo statusa begunca ali zaščite, je pa njihovo regularno bivanje v EU nemogoče. Takšne razmere izkoriščajo organizirane kriminalne združbe, ki profitirajo s tihotapljenjem ljudi čez meje, kar pa se lahko konča tudi s trgovino z ljudmi. Ljudje na dnu, brez zaščite in v strahu pred vrnitvijo domov pa iščejo različne možnosti preživetja. To je razvidno tudi iz naslednjih besed strokovnjakinje:

Slovenija sistemsko postavlja mehanizem, ki z vidika družbe predstavlja problematične situacije, ki ustvarja revščino, ki ljudi postavlja v statuse, zaradi katerih se ne morejo integrirati v delovne kroge. Iz ljudi delamo odvisne in produciramo revščino – takšne mreže ustvarjajo subproletariat. Sledi prestop v kriminal ali druge oblike upora. In ne samo, da postavljamo sistem strukturnega ustvarjanja revščine, temveč tudi sistem strukturnega ustvarjanja nezakonitosti. Ne razmišljamo o zakonitih poteh, ki bi sistemsko reševale problematiko. (Strokovnjakinja in raziskovalka mednarodnih migracij, 17. 10. 2023)

ZAKLJUČEK

S pomočjo oblikovanega eklektičnega modela migracij lahko pojasnimo (večino) migracij v Slovenijo. Model je oblikovan tako, da združuje ugotovitve ključnih teorij migracij (in omogoča tudi nadgradnjo). Pri analizi vzrokov za migracije je treba najprej opredeliti makrosociološke dejavnike ter identificirati vpliv najširših strukturnih (ekonomskih, političnih, kulturnih in okoljskih) dejavnikov. Na posameznike in njihove družine vpliva niz različnih dejavnikov, ki spodbujajo oziroma otežujejo odločitve za migracije. Prostor nekdanje skupne države predstavlja za jedrne države Evrope (pol)periferijo, ki ima v povezavi z mednarodnimi migracijami dvojno vlogo: 1) deluje kot bazen rezervne armade delavcev (tako nizko- kot visokokvalificiranih), ki jo jedrne države po potrebi vključijo v sedentarne dejavnosti svojih gospodarstev in jim tako omogočijo pridobitev poceni delovne sile; 2) deluje kot tamponska cona in filter za nezaželene migracije v jedrne države Evrope.

Najpogostejši vzroki za migracije v Slovenijo so povezani z ekonomskimi razmerami –migracije so posledica neenake gospodarske razvitosti držav, kar se kaže v različnih možnostih zaposlitve, razlikah v plačah itd. Te razlike so posledica različnega gospodarskega razvoja in različne vključenosti držav v globalne tokove kapitalističnega sistema. Slovenija je uspela v regiji vzpostaviti jedrno pozicijo napram državam nekdanje SFRJ, ki ji (še) omogoča novačenje delovne sile. K temu poleg ekonomskih dejavnikov pripomorejo še posebne zgodovinske, politične in kulturne vezi med Slovenijo in drugimi državami nekdanje SFRJ. Vse te povezave omogočajo, da slovenska podjetja pridobivajo delavce za panoge, v katerih ni dovolj domačih delavcev za ponujeno plačilo. Tuji delavci se zaradi birokratskih ovir, neustrezne delovne zakonodaje oz. nadzora in odsotnosti sankcioniranja kršitev delavskih pravic, počasnega odzivanja državne birokracije (upravnih enot), novih zahtev in zaostrovanja pogojev (npr. znanje jezika), pomanjkanja državnih programov za integracijo itd. znajdejo v podrejenem položaju in postanejo žrtve izkoriščanja. Te pomanjkljivosti in težave lahko v prihodnje ključno vplivajo na odločitev potencialnih migrantov za migracijo v druge države. Ob negativnih demografskih trendih lahko to predstavlja veliko težavo za delovanje slovenskega gospodarstva, socialnega sistema in celotne družbe.

Preko držav na ozemlju nekdanje SFRJ poteka t. i. Balkanska pot, po kateri v jedro Evrope prihajajo begunci in neregularni migranti. Največje število oseb je po tej poti prešlo Slovenijo leta 2015. Države EU so se na prihod sirskih, iraških in afganistanskih beguncev takrat odzvale z militarizacijo in sekuritizacijo mejnega nadzora, ki se v primeru Slovenije najbolj nazorno kaže s postavitvijo bodeče žice vzdolž celotne meje z drugo članico EU, tj. Hrvaško. Jedrne države EU si prizadevajo nezaželene migracije ustaviti oz. jih omejiti na območju Balkana, pri čemer od držav nekdanje SFRJ pričakujejo, da bodo opravile vlogo mejnega stražarja. Ker je meje nemogoče neprodušno zapreti, pri tem iščejo načine, kako te prehode čim bolj omejiti, na drugi strani pa politični odločevalci ravno nadzor migracij uporabljajo

kot spektakel, sredstvo za mobilizacijo politične podpore in demonstracijo moči države. To je dvorezen meč, saj tak pristop prispeva k dvigu nestrpnosti v državi in k zaostrenemu odnosu do vseh priseljencev in njihovim potomcem ter vodi celo v pojav ekstremističnih vigilantskih skupin (npr. delovanje t. i. vard, pojav skupine obritoglavcev, ki so po socialnih omrežjih širili posnetek iz Ljubljane tik pred volitvami v Evropski parlament leta 2024, na katerem so priseljence vezali na stebre, jim natikali zanke okoli vratu in nato izvedli množičen pohod po Ljubljani). Vendar vsi begunci niso nezaželeni. Obravnava ukrajinskih beguncev v državah EU in primerjava tega pristopa z obravnavo sirijskih in afganistanskih beguncev razkriva, da je humanitaren in civiliziran pristop pri obravnavi beguncev stvar politične volje, te politične odločitve pa so prežete tudi s predsodki in (neo)rasizmom.

ZAHVALE IN DRUGI PODATKI

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SUMMARY

AN ANALYSIS OF IMMIGRATION TO SLOVENIA FROM (AND THROUGH) COUNTRIES OF THE FORMER SFRY WITH THE USE OF THE ECLECTIC MODEL OF INTERNATIONAL MIGRATION

Aleš Bučar Ručman

The article presents an analysis of immigration to Slovenia from and through the countries of the former SFRY. The framework of the analysis is an eclectic migration theory model, which synthesizes and upgrades existing migration theories. At the center of the model, the author places the world-systems theory, which is upgraded with findings of other key migration theories. Through the analysis of statistical data and interviews/conversations with experts and practitioners in Slovenia and Bosnia and Herzegovina, as well as through the participation in the group for the preparation of the Slovenian Immigration Strategy, the author verifies the findings of the eclectic theoretical model on the case of immigration to Slovenia from and through the former common state.

The research employs an inferential approach, analyzing and utilizing pre-existing data to form new insights. Inspired by Massey's (2015) analysis of Mexico–US migration, the study examines migration to Slovenia from the former SFRY, using descriptive and causal inference to present migration characteristics and explain their causes. Data sources include statistical reports, scientific literature on migration theories, and meeting records from discussions with various stakeholders, including IOM, UNHCR, and the Slovenian government working group.

Slovenia, as a smaller global player, has positioned itself as a regional core state relative to the former SFRY countries, particularly Bosnia and Herzegovina, Serbia, Kosovo, and North Macedonia. The analysis reveals that a significant share of immigrants to Slovenia comes from these countries, where migration is driven primarily by economic reasons. Despite official data showing continued immigration from the former SFRY, experts exposed a growing trend of workers preferring to work in Austria and Germany instead of Slovenia. This preference is also the result of inappropriate immigration policies and bureaucratic hurdles.

The paper also discusses the Balkan route used by refugees and irregular migrants, highlighting the EU's response and the impact on Slovenia's immigration system. In 2015, the largest number of refugees passed through Slovenia via this route. The EU countries responded to the arrival of Syrian, Iraqi, and Afghan refugees with the militarization and securitization of migration control, which in the case of Slovenia was most visibly demonstrated by the placement of a razor wire fence along the entire border with another EU member, Croatia. The core EU countries aim to stop or limit unwanted migration in the Balkans, expecting the countries of the former SFRY to act as their guards. However, not all refugees are unwanted. The treatment of Ukrainian refugees in EU countries reveals that a humanitarian and civilized approach in dealing with refugees is a matter of political will.

A CONCEPTUAL FRAMEWORK FOR MULTI-WAY INTEGRATION (MUWI) WITH A FOCUS ON RESIDENTS' MULTIPLE IDENTITIES AND INTERSECTIONALITIES

Claudia Schneider¹

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ABSTRACT

A Conceptual Framework for Multi-Way Integration (MUWI) With a Focus on Residents' Multiple Identities and Intersectionalities

Conceptual frameworks on integration have moved from one to two-way integration, focusing on all residents in integration processes. This paper advocates a conceptual framework for "multi-way integration" (MUWI), which focuses explicitly on residents' multiple identities and intersectionality to enhance connectivity and mutual understanding between all residents. The discussion also addresses factors impacting this connectivity, including social structures, social mechanisms, artifacts, and environments. The above dimensions and interconnections are not only relevant for researching integration processes but also for developing effective integration strategies.

KEYWORDS: connectivity, migration, social mechanisms, artifacts, structures, environments

IZVLEČEK

Konceptualni okvir za večsmerno integracijo (MUWI) s poudarkom na večplastnih identitetah in presečnostih prebivalcev

Konceptualni okviri integracije so se premaknili od enosmerne k dvosmerni integraciji, pri čemer se osredotočajo na vse prebivalce v procesih integracije. Avtorica se v prispevku zavzema za konceptualni okvir za »večsmerno integracijo« (angl. *multi-way integration*, MUWI), ki se izrecno osredotoča na mnogovrstne identitete prebivalcev in njihovo presečnost, z namenom večje povezanosti in medsebojnega razumevanja med vsemi prebivalci. Pri tem obravnava tudi dejavnike, ki vplivajo na to povezanost, vključno z družbenimi strukturami, socialnimi mehanizmi, artefakti in okoljem. Navedene dimenzije in medsebojne povezave niso pomembne le za raziskovanje procesov integracije, temveč tudi za vzpostavljanje učinkovitih strategij integracije.

KLJUČNE BESEDE: povezanost, migracije, socialni mehanizmi, artefakti, strukture, okolja

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INTRODUCTION

Over the past two decades, integration scholars have moved from one-way assimilationist to two-way models of integration which focus on all residents (Ager & Strang, 2008; Strang & Ager, 2010; Penninx & Garcés-Masareñas, 2016; Spencer & Charsley, 2016; Spencer & Charsley, 2021; Ndofor-Tah et al., 2019). However, explicitly or implicitly, these approaches analyze social actors mainly in the context of the binary distinction and social constructs of migrants/non-migrants, insiders/outsideers, and newcomers/existing society. These dichotomies potentially perpetuate inequalities and exclusion in integration processes and contradict the aims of connecting all people (Foroutan, 2019). This paper argues that a multi-way integration (MUWI) framework, which emphasizes multiple identities and intersectionalities of all residents in integration processes, would address these contradictions and offer new opportunities for integration projects and research.¹ It contributes to Klarenbeek's (2021, p. 902) dimension of "integration with each other," which she views as under-researched.²

A few authors have explicitly discussed multiple identities and intersectionalities in migration and integration (e.g., Kaushik & Walsh, 2018; Manzi & Benet-Martinez, 2022). However, they mainly apply the above concepts to migrants rather than residents' integration with each other.³ Although intersectionality was initially developed in the context of gender, it is applied here to relational processes associated with interconnections of categories such as migration background, heritage, gender, class, age, and disability (Anthias, 2013; Collins & Bilge, 2020). Intersectionality is often reflected as a value-laden concept associated with multiple disadvantages and inequalities, whereby multiple identities are seen as a "positive politics of recognition" (Werbner, 2013, p. 403). Both intersectionality and multiple identities are applied in this paper as *a priori* neutral analytical concepts which highlight the interrelations of residents with diverse migration, heritage class, gender, age, and disability backgrounds (intersectionalities), and the associations with the above categories at an individual level of residents (multiple identities). Processes of interconnecting people with multiple identities and intersectionalities occur in the wider social context, which is reflected by Bunge's (2003) framework of structures, social mechanisms, artifacts, and environments.

The article aims to present and discuss an analytical framework that emphasizes concepts and analytical connections that have not been (explicitly) addressed by previous integration frameworks. The discussion highlights gaps in primary research

1 The term multi-way integration was developed by the author for a workshop with community leaders in England (Schneider, 2020).

2 However, Klarenbeek (2021) applies her notion of "integrating with each other" to the limited binary of "insiders" and "outsiders."

3 The concept of residents does not relate to a legal definition of "resident" but refers to all people residing in a country for a shorter or longer period.

and practice regarding the role of multiple identities and intersectionalities in integration processes and their connections with artifacts, mechanisms, structures, and environments. The article, therefore, aims 1) to start a discussion of moving multiple identities and intersectionality into the center of integration research and practice and 2) to identify areas for further exploration by academics, practitioners, and policymakers. Following a review of integration frameworks in the context of multiple identities and intersectionalities, the paper develops the multi-way integration (MUWI) framework. The final section discusses the application of MUWI in the context of practice and research, followed by recommendations for multi-way integration strategies.

ANALYSIS OF EXISTING INTEGRATION FRAMEWORKS

This section will look at conceptual frameworks of integration developed by Ager & Strang (2008), Strang & Ager (2010), Penninx & Garcés-Mascreñas (2016), Ndofo-Tah et al. (2019), and Spencer & Charsley (2016; 2021). They will be analyzed in the context of residents' multiple identities and intersectionalities, social structures, social mechanisms, artifacts, and environments, and inform the development of the MUWI framework further below.

Social actors and their multiple identities and intersectionalities

As the introduction outlines, most integration frameworks use a binary understanding of social actors, focusing on labels such as migrants/non-migrants and outsiders/insiders. These binaries are problematic as they reflect exclusive categories and labeling processes that potentially contradict the process of bringing people together (Anthias, 2013; Foroutan, 2019). A recent framework developed by Ndofo-Tah et al. (2019) started to critique the dichotomy:⁴

Integration is a process of “mixing” through interaction between people who are diverse in multiple ways, not only on the basis of ethnicity or countries of origin. This framework *does not* assume the existence of a homogenous society in which a minority group may be “inserted.” (Ndofo-Tah et al., 2019, p. 20, emphasis in original)

Spencer & Charsley (2021) have also amended their original framework (2016) in their latest publication to focus on individuals in general. Although both Ndofo-Tah et al. (2019) and Spencer & Charsley (2021) try to avoid the migrant/non-migrant binary, they do not incorporate more explicit aspects of individuals' multiple identities and intersectionalities into their frameworks. They continue to associate specific

4 Ndofo-Tah et al.'s (2019) framework is based on Ager & Strang's (2008) original framework.

analytical dimensions with migrants or non-migrants. For example, Ndofor-Tah et al. (2019) use Ager and Strang's (2008) concept of facilitators (i.e., language, cultural knowledge, safety and stability, and digital skills) and associate these facilitators with migrants.⁵ However, these facilitators are relevant for all residents to engage in integration processes. For example, Ager and Strang's facilitator of safety and stability can be associated with sufficient and continuous financial means for appropriate living standards. This aspect is relevant for all residents in integration processes as it might be linked, for example, to tolerance and openness. Paas & Halapuu (2012) argue that higher income levels are a potential factor for tolerance and openness (see discussion further below).

The emphasis on the agency of migrants is further reflected by the authors' discussions of "superdiversity" (Strang & Ager, 2010). Superdiversity is applied to migrants, while it is not acknowledged and discussed in the context of those labeled non-migrants. The acknowledgment of superdiversity, reflected in multiple identities and intersectionalities across all residents, is an important aspect of understanding how people connect to each other and which potential opportunities and barriers exist for these interconnections. Ager & Strang (2008) distinguish between social bridges and social bonds in integration processes. Social bonds are defined as social relations with family and co-ethnic, co-national, and co-religious groups, while social bridges reflect actors' relations with "other" communities. Applying concepts of multiple identities and intersectionalities can offer new opportunities for creating social bonds and bridges in the context of integration, which will be discussed in the framework below.

Linking actors with wider structures, social mechanisms, artifacts, and environments

The role of actors' multiple identities and intersectionalities needs to be embedded into the wider societal context of structures, social mechanisms, artifacts, and environments to analyze their enhancing or limiting effects on residents' connectivity. Although *structures* are mentioned in existing integration frameworks, they are mainly referred to as macrostructures (e.g., the labor market, education systems, and the housing market) and are primarily associated with the "receiving society" (Ager & Strang, 2008; Strang & Ager, 2010; Spencer & Charsley, 2016; Ndofor-Tah et al., 2019; Spencer & Charsley, 2021). Macro structures such as the media (print, broadcast, and online) and the arts are generally not discussed, although they play a crucial role in integration processes by enforcing or reducing stereotyping and discrimination (Van Doorslaer, 2021).

Penninx & Garcés-Mascreñas (2016) focus on institutional structures in their framework:

5 Digital skills are added to the 2019 framework.

The first are the general public institutions of the receiving society in the three dimensions: institutional arrangements of the political system; institutional arrangements in the labour market, housing, education, and public health; and institutional arrangements for cultural and religious diversity. Laws, regulations, and executive organizations, but also unwritten rules and practices, are part of these institutions. [...] The second type of institution that is particularly relevant for immigrants' integration is institutions specifically "of and for" immigrant groups, such as certain religious or cultural ones. (Penninx & Garcés-Mascreñas, 2016, pp. 17–18)

Penninx & Garcés-Mascreñas (2016) apply a binary distinction of "immigrant" and "receiving society" to their institutional analysis. Emphasizing the role of multiple identities and intersectionalities in these organizations can enhance integration research and practice. They offer a comprehensive discussion of the link between structures and social actors, mentioning explicitly the impact of institutions and organizations on individuals and *vice versa*:

Institutions and organizations, in turn, together create the structure of opportunities and limitations for individuals. Conversely, individuals may mobilize to change the landscape of organizations and may even contribute to significant changes in general institutional arrangements. In view of the uneven distribution of power and resources noted above, such examples are scarce, but they are not non-existent. (Penninx & Garcés-Mascreñas, 2016, p. 18)

This paper argues that the link between actors and structures is important for social integration research and policies. MUWI's focus is not only on "bringing people together" but also on residents' development, maintenance, and change of structures and how structures reflect barriers and opportunities for all residents in the integration process. These points will be discussed further in the context of the MUWI framework.

Although the integration literature does not explicitly discuss the concept of social mechanisms, it mentions several of them in different frameworks. Bunge (2004) does not view causation as the only mechanism but also identifies spontaneity, random processes, goals, and utility as potential mechanisms. He emphasizes that "most mechanisms are non-mechanical," especially in the context of the social sciences (Bunge, 2004, p. 203). Pickel (2004) emphasizes mechanisms at the sociopsychological level and critiques Bunge's (2004) view of mechanisms as solely existing at the structural level. MUWI explicitly addresses mechanisms both at the structural and the sociopsychological level. Some particular social mechanisms are mentioned in integration frameworks. Spencer & Charsley (2016; 2021) cite, for example, the social mechanisms of responsibility, transnationalism, racism, and discrimination in integration processes. Power is discussed by Penninx & Garcés-Mascreñas (2016), who highlight the imbalance of power which favors the "receiving society." Social

mechanisms are often discussed as negative factors impacting integration, and the role of positive mechanisms, such as tolerance and openness (Shady & Larson, 2010), will be discussed further below.

Artifacts are another dimension that Bunge (2003) highlights in social processes. He defines them as man-made objects, which refer to a wide range of objects in the context of private and public spaces, including signs, sculptures, clothes, food, and buildings. Many integration projects in communities focus on exhibitions of artifacts and, especially, objects associated with different migration and heritage backgrounds (Migration Museum, n.d.). It is, therefore, surprising that none of the conceptual frameworks for integration mention the role of artifacts. Miller (1987) argues that “the human subject cannot be considered outside the material world within which and through which it is constructed” (1987, p. 86). Another underrepresented area in integration frameworks is the influence of local, regional, national, and international environments on integration processes. They will be discussed further in the context of the MUWI framework.

A FRAMEWORK FOR MULTI-WAY INTEGRATION PROCESSES



Figure 1: A conceptual framework for multi-way integration (MUWI) processes

At the center of Figure 1 is connectivity between residents via their multiple identities and intersectionalities. Multiple intersectionalities refer to the interrelations of residents with diverse migration, class, gender, age, disability, and heritage backgrounds, whereas multiple identities refer to residents' associations with the above categories at an individual level (Anthias, 2013; Manzi & Benet-Martinez, 2022). Although intersectionality is often discussed in the context of inequalities, Anthias (2013, p. 4) argues that "[a]t a very broad level, and put simply, intersectionality posits that social divisions interrelate in terms of the production of social relations and in terms of people's lives." The focus on residents' multiple identities and intersectionalities offers opportunities for increased connectivity between residents, which can enhance mutual understanding and reduce prejudice and exclusion. For example, integration events can specifically focus on connectivity by bringing people together across different classes, genders, or age divisions, whereby migration becomes one of many aspects relating to residents' identities and intersectionalities, which are reflected in residents' dialogues. Connectivity is here understood as connections and meaningful social interactions between residents. The MUWI approach, therefore, reflects intergroup contact theory, which argues that increased contact and meaningful encounters between people reduce prejudice (Pettigrew & Tropp, 2013). Pettigrew & Tropp (2013) argue that increasing knowledge, reducing anxiety, and encouraging perspective-taking and empathy can mediate the link between contact and reducing prejudice.

By focusing on multiple identities and intersectionalities, MUWI addresses several shortcomings in the literature and in practice. Firstly, it avoids the sole emphasis on the migrant/non-migrant binary, which reflects limited and divisional integration processes and contradicts integration processes focusing on connectivity. Secondly, by emphasizing residents' multiple identities, MUWI increases opportunities for residents' connectivity across similar and/or different identities. The wider focus on multiple identities aims to enhance residents' engagement in integration processes, as it speaks to residents who do not necessarily emphasize the migration/non-migration categories in their identities and/or are keen to focus on other identities with which they associate. Thirdly, MUWI goes beyond individual associations with different identities and aims to develop and enhance social relations between all residents by emphasizing their intersectionalities across different social categories. By encouraging social relations that reflect multiple intersectionalities between residents, MUWI aims to offer more opportunities for contact and meaningful encounters between residents. These contacts can improve mutual understanding and reduce prejudice, as advocated by intergroup contact theory. However, "meaningful" contact needs to be carefully organized to avoid potential conflict in encounters (Pettigrew & Tropp, 2013), as discussed in the context of practice examples below.

By going beyond the migrant/non-migrant dichotomy, MUWI addresses questions such as: to what extent can integration strategies, which emphasize multiple

identities of all residents, enhance residents' motivation to engage in integration processes? How does contact among residents that emphasizes multiple identities and intersectionalities improve mutual understanding and reduce prejudice between all residents?

Figure 1 highlights that the processes of enhancing residents' connectivity are linked to the wider social context represented by social structures, social mechanisms, artifacts, and environments. Social structures offer opportunities and barriers to residents' agency and social interaction and are developed, maintained, and changed by residents. Authors focus, in particular, on macro structures and discuss, for example, migrants' access to the employment market and the education system (Coletti & Pasini, 2023; Sandberg et al., 2023). Migrants' access to structures is an important dimension of integration. However, further investigation into how macro structures impact residents' connectivity could highlight further opportunities and barriers in integration processes. Relevant structures in integration processes relate not only to macro structures but also to organizational, normative, and power structures. Structures within schools, workplaces, and governmental and non-governmental organizations play a crucial role in enhancing or limiting connectivity between residents. Mechanisms for organizational change are relevant in this context. Dacin et al. (2002, p. 49) highlight, for example, that new personnel or "agents of change" who question existing interpretations and justifications of organizational practices may trigger organizational change at the micro level. Increased workforce diversity also impacts change (Dacin et al., 2002, p. 49), and the reflection of multiple identities across organizations is an important aspect of developing MUWI. These processes can positively impact normative structures, defined as longstanding behavior patterns and norms (Wiener, 2008). In particular, the media (especially social media) and the political debate play a crucial role in creating normative structures that divide or bring people together (Van Doorslaer, 2021). The author is aware that, in a political climate of an increasing influence of the far right, MUWI approaches will potentially encounter numerous critiques and barriers, and conducting evidence-based research into effective strategies to address these barriers will be crucial in developing MUWI. Ideas about integration are a key aspect of normative structures influencing integration processes. Recent studies in schools and communities have shown that ideas about one-way integration and assimilation are widely held by teachers and representatives of governmental and non-governmental organizations (Hellgren, 2016; Schneider & Arnot, 2018; Schneider, 2020).

In the context of social interaction and change, MUWI is interested in identifying social mechanisms that can enhance or limit residents' interconnectivity. Social mechanisms are reflected at the individual and the structural level (Bunge, 2004; Pickel, 2004). As mentioned above, Pettigrew & Tropp (2013, p. 11) relate meaningful contact to different social mechanisms such as increasing knowledge, reducing anxiety, and encouraging perspective-taking and empathy. Shady & Larson (2010) highlight the role of openness in integration processes, which plays an important

role in MUWI. They introduce three aspects of fostering openness: “(1) tolerance, a neutral openness to the other’s position; (2) empathy, a complete absorption of the other’s position; and (3) inclusion, genuine dialogue about one’s own position and the other’s” (Shady & Larson, 2010, p. 81). Key strategies for enhancing openness and tolerance at an agency level, which potentially changes normative structures regarding integration, include, for example, the transfer of information regarding individuals’ experiences to increase mutual understanding, the reduction of misinformation (especially via social media), and contact and dialogue between diverse groups (UNDP, n. d.; Up2Europe, 2016). The school context is particularly relevant, and Vižintin (2022) has developed and analyzed concrete strategies for schools to enhance tolerance and openness among staff, parents, and pupils via intercultural education. Integration means openness toward difference and finding sameness, e.g., common humanity, common experiences, and commonalities (Balint, 2011). MUWI’s rejection of having the migrant/non-migrant binary in the center of integration and its focus on multiple identities and intersectionalities create new opportunities for residents to find these commonalities, as illustrated further in the context of MUWI strategies outlined below.

Figure 1 highlights the importance of analyzing the role of artifacts in integration processes. How can artifacts enhance or hinder the connectivity of residents and reflect their multiple identities and intersectionalities? There is a lack of research that analyzes the impact of artifacts on integration. Following Miller (1987), human interaction cannot be analyzed outside the material world, and artifacts have a relevant role in MUWI. However, artifacts should not just be associated with migrants or non-migrants, as is often seen in exhibitions and events. Instead, MUWI emphasizes using artifacts to find commonalities and represent a shared humanity, using themes that potentially apply to all residents (e.g., childhood memories, different hobbies). The current discussion regarding the association of certain sculptures with colonialism, racism, and inequality reflects the significance of artifacts in integration processes (Goes, 2022). Ghanbari (2019) and Meriç (2023) have recently researched the role of architecture and music in the context of bringing residents with diverse backgrounds together.

Wider environments (cultural, political, legal, historical, etc.) at the local, regional, national, and international levels are relevant to understanding residents’ connectivity. There is a clear gap in the literature to research the impact of environments in the context of MUWI. The few studies on integration and the environment exclusively focus on migrants’ experiences and perspectives. For example, Phillips & Robinson (2015) investigate the impact of the local neighborhood on integration processes, whereas De Coninck & Solano (2023) analyze the impact of different national contexts on local integration. The former research is important. However, MUWI adds another focus and raises questions about the extent to which such wider environments enhance or limit the interconnectivity between all residents.

AN EVALUATION OF EXISTING INTEGRATION PROJECTS IN THE CONTEXT OF MUWI

Before discussing how the MUWI framework (Figure 1) can be transferred into practice, this section will briefly overview existing integration projects and to what extent they already reflect aspects of MUWI. A specific example relating to the educational context will be examined in more detail. Most integration projects implemented worldwide emphasize advice, language training, and employment and focus exclusively on migrants (see Schneider, 2020). Increasingly, integration projects go beyond the focus of migrants and emphasize dialogue between all residents. For example, projects that focus on bringing young people with and without a refugee background together in the context of theatre, hobbies, and leisure (Cherri, 2019) or projects that connect longer-term residents with newly arrived refugee families (Bee4change e.V., 2023). However, the above projects are characterized by the migrant/non-migrant binary. Projects which are not explicitly structured around the binary are less frequent. For example, the “Walking School Bus” in New Zealand, where parents and pupils walk together to school, offers potential opportunities for connectivity between parents with multiple identities and intersectionalities (NZ Transport agency Waka Kotahi, 2023).⁶ Libraries and museums are also increasingly used to connect residents across multiple identities and intersectionalities at the local level (Council of Europe, 2025; Staatliche Museen zu Berlin, 2016). Various longitudinal projects have researched strategies to enhance school integration (Evans et al., 2020; Vižintin, 2022). The following is an in-depth analysis of a school program that reflects several aspects of MUWI.

The Schools Linking Programme in England connects pupils across different schools in their location to enhance meaningful encounters between pupils with multiple identities and intersectionalities (Akhtar et al., 2017).

The structured year-long Schools Linking Programme brings together pairs of classes or groups who would otherwise not meet, and in so doing, contributes to integration in the local area. This process supports integration by facilitating meaningful encounters between people from different backgrounds to one-another (Akhtar et al., 2017. p. 40).

Pupils participating in the program explore four key questions with pupils from another school.

- Who am I? Exploring identity, including faith, as part of multiple identity
- Who are we? Celebrating diversity, including exploring similarity and difference, developing awareness

⁶ Thank you to Ana Gonzalez-Quintero who identified several of the international projects on integration as part of a small, university-funded research project.

- Where do we live? Promoting community, broadening perspectives, and a sense of belonging for all, locally, nationally, globally
- How do we all live together? Championing equality, challenging prejudice in all its forms and promoting active citizenship and empathy (Akhtar et al., 2017, p. 41).

The above questions encourage meaningful contact between pupils, focusing on multiple identities, prejudice, community, and environments. The program's qualitative and quantitative evaluation highlights increased interaction and understanding: "a positive impact on many aspects of pupils' skills, attitudes, perceptions and behaviours, particularly their respect for others, their self-confidence and their self-efficacy, as well as broadening the social groups with whom pupils interact" (Akhtar et al., 2017, p. 40).

The authors emphasize the careful planning of organizing meaningful contact, involving additional teacher training and a safe, neutral place, which is used for the first encounter between pupils of different schools to address the "deep dynamics of power and belonging that can come up in exchanges" (Akhtar et al., 2017, p. 42). These considerations are necessary to avoid increased contact, which could lead to conflict (Akhtar et al., 2017, p. 42). The program explicitly addresses social mechanisms, such as increasing knowledge and perspective-taking, to foster the avoidance of prejudice from an early age. The project reflects many elements of MUWI, and the next section further discusses its implementation.

MUWI IN PRACTICE AND RESEARCH

The key focus of MUWI is to enhance meaningful connectivity (in-person and digital) between residents, emphasizing their multiple identities and intersectionalities. The online sphere already offers opportunities for connectivity, e.g., via Google meet-up groups and neighborhood support groups. However, online networks often reflect and reinforce divisions regarding class, gender, and age (Wessels, 2015). Implementing MUWI would involve connectivity across different age, gender, class, heritage, and other divisions, whereby migration is potentially one dimension of many characterizing residents' social identities and intersectionalities, which are reflected in residents' dialogues and conversations. In-person and meaningful interaction of residents across divisions will be especially difficult to organize due to barriers, including residents' availability at a specific time, travel and cost to reach the location, and potential stereotypes. MUWI might, therefore, focus on places that residents with diverse backgrounds already frequent, e.g., schools, employment, and leisure facilities. To emphasize human commonality and to motivate all residents to engage with each other, generic themes relating to hobbies (e.g., fishing, gardening, photography, crochet), stories of kindness, and "arriving at a new place" can be focused on,

rather than themes which relate explicitly to the migration/non-migration binary (Van de Vyver & Abrams, 2017; Schneider, 2020).

As analyzed further above, MUWI is not only interested in the connectivity between residents but also highlights its links to social structures, social mechanisms, artifacts, and environments. How macro structures can have enhancing or limiting effects on connectivity and residents with multiple identities and intersectionalities potentially maintain or change these macro structures is a key aspect of further primary research related to MUWI. At a more concrete level, MUWI should address organizational structures (e.g., schools, employment, leisure, and health and social care) and how such structures can enhance residents' connectivity and represent their multiple identities. MUWI challenges normative structures, especially those produced by the media and political and public debate, which continue to reflect integration as a one-way process whereby migrants should adapt or assimilate into the receiving country (Ehrkamp, 2006). Normative structures incorporate different social mechanisms, and MUWI actively encourages social mechanisms, such as openness and tolerance. Intergroup contact theory has shown that meaningful dialogue between people can enhance these social mechanisms (Pettigrew & Tropp, 2013). Artifacts also play an important role in enhancing social interaction, mutual understanding, and commonalities. Focusing on "migrant" objects or "local history" is relevant but risks reinforcing the binary between "migrants" and the "existing community." Rather than one group "displaying" their objects and the other "observing," artifacts that relate to all residents could be used in community exhibitions to encourage social interaction between residents who normally might not interact. The effective role that artifacts can play in connecting residents with diverse backgrounds was reflected in an integration project organized for the Being Human Festival 2019 (Schneider et al., 2019.; Hardin et al., 2023). Residents with diverse backgrounds were invited to exchange stories of "arriving at a new place" (at a new school, workplace, or country). They were encouraged to bring an object representing their arrival to initiate their conversation. The speed with which residents with multiple identities began in-depth dialogues, reflecting personal and emotional aspects relating to their object and their experiences of arrival, was genuinely surprising for the participants and the researchers: *I was worried that talking to a person I didn't know wouldn't work, but it worked very well. If you talk to anybody, you will always find a connection* (Participant). The project not only highlights the facilitative role of artefacts in integration processes but also the increase of residents' mutual understanding via a relatively brief encounter.

Integration processes involving social actors, social structures, social mechanisms, and artifacts take place in the closer or wider social, political, media, economic, historical, and geographical environment. In practice and research, these environments must be considered when connecting people with multiple identities and intersectionalities. The Schools Linking Programme has shown that these environments could be, for example, incorporated into participants' dialogues with other

residents so that they can reflect upon environmental impacts on their identities and connectivity (Akhtar et al., 2017). However, this area of MUWI requires further exploration, as there is a lack of existing primary research.

Overall, the MUWI approach reflects a holistic approach to integration, addressing dimensions relating to social actors' multiple identities and intersectionalities and their link to social structures, social mechanisms, artifacts, and environments. Research and community projects might focus on the holistic aspects of the framework or look at specific areas of the framework in the context of connectivity of all residents.

RECOMMENDATIONS

Reflecting the above discussion, the following will summarize a range of recommendations for implementing and researching MUWI processes and strategies:

- Encouraging connectivity (digitally and in-person) across different age, gender, class, heritage, etc. divisions, whereby migration is potentially one dimension of many characterizing residents' social identities and intersectionalities, which are reflected in residents' dialogues and conversations.
- Enhancing structures (e.g., macro, organizational, normative, and power structures) to increase residents' connectivity and offering opportunities for residents with multiple identities and intersectionality to influence these structures.

At a more practical level, the following strategies are recommended:

- Using existing places of social interaction for MUWI projects (e.g., schools, workplaces, sports centers, libraries, care homes, allotments) to overcome potential problems of bringing diverse residents together.
- Developing projects that emphasize shared themes of humanity that all residents can potentially relate to, e.g., different hobbies, childhood memories, stories of kindness, and arriving at a new place.
- Implementing smaller integration events, focusing on multiple identities and intersectionalities across different localities in communities throughout the year.
- Schools play an important role in establishing MUWI in communities, and MUWI could become part of teacher training.

CONCLUSION

The paper advocates the concept of multi-way integration (MUWI), which explicitly addresses residents' multiple identities and intersectionalities and their interconnections with social structures, social mechanisms, artifacts, and environments. Multiple identities and intersectionalities go beyond the migration category and relate to dimensions such as class, gender, age, heritage, and disability at the individual and relational level. The paper argues that the emphasis on the above aspects addresses potentially exclusionary processes relating to the migrant/non-migrant binary, which is widely used in integration research and practice. MUWI aims to increase opportunities for contact and connectivity between all residents to enhance mutual understanding and reduce prejudice in integration processes. Connectivity between residents occurs in the wider context of social structures, social mechanisms, artifacts, and environments. The MUWI framework raises questions about how the above dimensions can enhance or limit the connectivity of residents with multiple identities and intersectionalities and how residents may develop, maintain, or change these aspects. Overall, opportunities and barriers, which are associated with the connectivity of residents with multiple identities and intersectionalities, need to be targeted more explicitly in integration research, practice, and policy.

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POVZETEK

KONCEPTUALNI OKVIR ZA VEČSMERNO INTEGRACIJO (MUWI) S Poudarkom na večplastnih identitetah in presečnostih prebivalcev

Claudia Schneider

Avtorica v prispevku vzpostavi analitični okvir za raziskovanje in izvajanje procesov integracije, ki izpostavlja priložnosti večplastnih identitet in presečnosti prebivalcev v teh procesih. V zadnjih dveh desetletjih so raziskovalci integracije prešli od enosmer-
nih asimilacijskih k dvosmernim modelom integracije, ki se osredotočajo na vse prebivalce (Ager & Strang, 2008; Spencer & Charsley, 2016; Spencer & Charsley, 2021; Penninx & Garcés-Mascareñas, 2016; Ndofor-Tah et al., 2019). Vendar pa ti pristopi, bodisi eksplicitno ali implicitno, obravnavajo družbene akterje predvsem z vidika binarnega razlikovanja in družbenih konstruktov »migranti/nemigranti«, »insajderji/avtsajderji« ter »prišleki/obstoječa družba«. Takšne dihotomije potencialno ohranjajo neenakosti in izključevanje v procesih integracije in so v nasprotju s cilji povezovanja vseh ljudi (Foroutan, 2019). Avtorica v prispevku zagovarja stališče, da bi s prenehanjem razlikovanja med migranti in nemigranti ter poudarjanjem večplastnih identitet in presečnosti vseh prebivalcev v procesih integracije lahko odpravili ta protislovja ter omogočili nove priložnosti za strategije in raziskave integracije.

Zato avtorica zagovarja koncept večsmerne integracije (angl. *multi-way integration*, MUWI), ki izrecno upošteva raznolike identitete in presečnosti prebivalcev ter njihovo prepletenost s strukturami, družbenimi mehanizmi, artefakti in okoljem. Večplastne identitete in presečnosti presegajo migracijske kategorije in poudarjajo dodatne vidike v procesih integracije na individualni in relacijski ravni, kot so razred, spol, starost, nasledstvo in invalidnost. V prispevku zagovarja tezo, da se je mogoče s poudarkom na navedenih vidikih izogniti potencialno izključevalnim procesom, povezanim z binarnima kategorijama migrant/nemigrant, ki sta pogosto uporabljani v raziskavah in praksi na področju integracije. Cilj koncepta MUWI je omogočiti več priložnosti za povezovanje med vsemi prebivalci z namenom bolj-
šega medsebojnega razumevanja in zmanjšanja predsodkov v procesih integracije. Povezavo med smiselnimi stiki, večjo odprtostjo in zmanjšanjem predsodkov zagovarja teorija medskupinskih stikov (Pettigrew & Tropp, 2013). Prebivalci se povezujejo v širšem kontekstu družbenih struktur, mehanizmov, artefaktov in okolij. Koncept MUWI opozarja, da lahko navedeni vidiki krepijo ali omejujejo povezanost prebivalcev z raznolikimi identitetami in presečnostmi ter da lahko prebivalci te vidike razvijajo, ohranjajo ali spreminjajo. Na splošno je treba v praksi, politiki in raziskavah na področju integracije konkretnije nasloviti priložnosti in ovire na področju povezanosti prebivalcev z večplastnimi identitetami in presečnosti. Namen tega konceptualnega okvira je spodbuditi razpravo o pomenu in povezavah med zgoraj opisanimi koncepti za procese integracije ter spodbuditi nadaljnje raziskave posameznih vidikov predstavljenega okvira.

SEEKING CARE IN THE NEIGHBORING COUNTRY: AN INSTITUTIONAL ANALYSIS OF TRANSNATIONAL CARE FOR OLDER PEOPLE BETWEEN SLOVENIA AND CROATIA

Majda Hrženjak¹

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ABSTRACT

Seeking Care in the Neighboring Country: An Institutional Analysis of Transnational Care for Older People Between Slovenia and Croatia

Using the concepts of care gap, transnationalization of care, and retirement migration—and based on interviews with stakeholders and an institutional analysis of care provision for older people in Slovenia and Croatia—the article examines retirement care migration between the two countries. It shows that the marketization of care in Croatia matches the care gap in public provision in Slovenia, which establishes “precarious hybrid transnational care.” Older people use two strategies—citizenship rights and the market—to access cheaper residential care across the border, though of lower quality than in Slovenia. The study shows that transnational care can arise out of specific national institutional configurations of care.

KEYWORDS: care for older people, care gap, transnationalization of care, retirement migration, hybrid transnational care

IZVLEČEK

Iskanje oskrbe v sosednji državi: institucionalna analiza transnacionalne oskrbe starejših ljudi med Slovenijo in Hrvaško

Avtorica prispevka s pomočjo konceptov skrbstvene vrzeli, transnacionalizacije oskrbe in upokojske migracije ter na podlagi intervjujev z deležniki in institucionalne analize oskrbe v Sloveniji in na Hrvaškem predstavi skrbstvene mobilnosti iz Slovenije na Hrvaško. Pokaže, da marketizacija oskrbe na Hrvaškem dopolnjuje skrbstveno vrzel v javnih storitvah v Sloveniji, s čimer prihaja do »prekarne hibridne transnacionalne oskrbe«. Starejši ljudje uporabljajo dve strategiji – pravice iz naslova državljanstva in trg – za dostopanje do cenejše institucionalne oskrbe onkraj meje, čeprav je ta slabše kakovosti kot v Sloveniji. Avtorica pokaže, da lahko transnacionalizacija oskrbe izhaja iz specifične institucionalne konfiguracije oskrbe na nacionalni ravni.

KLJUČNE BESEDE: oskrba starejših ljudi, skrbstvena vrzel, transnacionalizacija oskrbe, upokojska migracija, hibridna transnacionalna oskrba

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INTRODUCTION

"I was paying €1,080 a month all year round in a residential care in Brežice and €570 a month in Croatia," said a Brežice resident whose mother is in Bregana: "My mother has a farmer's pension of €200. You can write down the reason we send parents to Croatia." In the seven counties along the border with Slovenia, there are 169 residential care facilities, which can take up to 20 care receivers each and are classified by the Croatian state as out-of-institutional care, and hundreds of Slovenians are living in them. (Zore, 2018)

A series of articles has been appearing continuously since 2014 in the Slovenian media reporting on Slovenian citizens seeking old-age care in Croatia. Cross-border care can be seen from a wider perspective as a symptom of the care gap faced by countries in the Global North because of the aging populations and the neoliberal economization of care costs. The challenges of the care gap cross national borders. People experience them in many ways: as a high cost of care that exceeds the available income of older people, insufficient coverage of public services, and inequalities in access to services; care workers shortages; overburdened family members when care is delivered at home; the alignment of care with institutional rationales instead of focus on individuals' needs (Bettio & Verashchagina, 2010; Spasova et al., 2018).

The transnationalization of care as the outsourcing of the labor, time, and cost of care to poorer countries is becoming an important strategy that countries, families, and individuals use to face old-age care gaps. Concerning the lack of staff, one of the most common responses of the states has been to facilitate the migration of caregivers from low-income countries. Germany, for instance, is implementing the Triple Win program, i.e., the systematic recruitment of care workers from peripheral European countries by setting up nursing schools and providing elaborate integration programs (Mosuela, 2020). Through its public care homes, the Norwegian welfare state acts as a global employer, collaborating with a nursing college in Latvia and brokering recruitment agencies (Widding Isaksen, 2012). Slovenia also tries to compensate for the shortfall of care workers by recruiting care workers from "third countries" through the activation of migrant networks and bilateral employment agreements (Hrženjak & Breznik, 2023). Families increasingly rely on privately paid caregivers who often work irregularly within a circular migration pattern and provide 24/7 care in older people's households. In the European Union, these are mostly migrant care workers from Eastern European countries (Aulenbacher et al., 2024). A series of important concepts, such as "global care chain" (Hochschild, 2000), the "international division of reproductive labor" (Parreñas Salazar, 2001), the "global nursing care chain" (Yeates, 2009), and "circular care migration" (Triandafyllidou & Marchetti, 2013), have been developed at the intersections of migration, gender, and care research to articulate this transnational division of care, in which class and race play out within gender hierarchies.

The research on care labor migration has left the impression that traveling care workers are the mobile ones, while care receivers are perceived as sedentary, as “belonging,” and as those who are recruiting “strangers” into their homes and services (Widding Isaksen & Näre, 2019). However, in contrast to the strategy of “moving care work in,” another more recent cross-border care migration strategy refers to establishing residential care in other countries, catering to specific national groups of people in need of care. This is the strategy of “moving care work out,” whereby older people and their care needs are shifted to other countries. These developments have been observed as older people from Germany, Switzerland, and Japan migrating to residential care established in Southeast Asia (mainly Thailand) and Eastern Europe (mainly Poland and Slovakia) (Toyota & Xiang, 2012; Horn et al., 2015; Schwiter et al., 2020; Großmann & Schweppe, 2020). This strategy reverses the directionality of care migration, in what Hochschild (2000) has termed the global care chain, by sending older people needing care to countries where care is less expensive (Schwiter et al., 2020). So far, the migration of older people who pursue affordable care has only been given scant research attention.

Both strategies of coping with the care gap call attention to the transnational dimension in understanding changes in care for older people. Here, transnationalization is understood in terms of people having professional and private ties to institutions and individuals in various countries simultaneously. In contrast to understanding migration as a unidirectional and permanent movement of people, the analysis from a transnational perspective highlights migration as an unfinished multidirectional process, circular back-and-forth movements, daily commuting, and maintaining cross-border ties and obligations (Amelina & Lutz, 2019, p. 35). While methodological nationalism (Anderson, 2019) cannot be entirely abandoned, a critical distance from it is necessary even when analyzing nation-state-bounded policies and institutions such as the welfare state. It enables the understanding of social structures, relations, identities, and practices that stretch across national terrains and redirects analytical focus to the diverse and complex ways in which socio-institutional formations and practices are materially connected across distant and proximate territories. Focusing on care from a transnationalization perspective reveals how social organization, institutions, relations, and welfare practices are being stretched and structured across national borders (Yeates, 2011, pp. 1116–1117).

The transnationalization of care for older people between Slovenia and Croatia is intense and takes place in both directions, especially in places along the Slovenian–Croatian border. As of 2018, Croatian citizens no longer need work permits and enjoy the labor rights of European Union citizens in the Slovenian labor market. Although Croatia faces a major staff shortage in care, many of the country’s care workers commute daily to work in Slovenia (Bađun, 2024). Due to the proximity of the border, the linguistic affinity, and the higher salaries resulting from the economic differences between the two countries, they choose to work in Slovenia and reside in Croatia. The media also regularly report the emigration of older people from

Slovenia to Croatia for residential care due to lower prices and shorter waiting lists, especially in Croatian family residential care facilities, representing a specific deregulated, market-based, low-cost form of residential care for older people. Indeed, the phenomenon sits at the intersection of migration and mobility, as it involves both a change of residence driven by care needs and more fluid, temporary, cross-border movements characteristic of mobility. Dwelling in a residential care facility in Croatia is related to transnational life as it demands frequent cross-border traveling for family visits, sustaining social networks, and medical care (Hrženjak, 2019).

In this article, we analyze the nationally and internationally under-researched aspect of the transnationalization of care, i.e., the migration of older people from Slovenia to Croatia for more affordable care. The study focuses on the institutional configuration that drives older people's cross-border mobility and the marketization of care. We aim to contribute to a better understanding of how the co-effect of two neighboring national welfare states, which in past decades have been caught up in transitional neoliberal reorganization, results in the transnationalization of care for older people.

First, we outline how the migration of older people for care has been discussed in an international research framework on retirement migration. We then present the methods used to collect the empirical evidence and outline how older people migrate for care in Slovenia. The analysis is intended to provide an institutional analysis that enables an understanding of the structural factors driving the transnationalization of older people between Slovenia and Croatia. Therefore, in the following, we provide an institutional analysis of the Slovenian and Croatian care systems, focusing on identifying the push and pull factors and their interaction that drive this migration between these neighboring countries.

RETIREMENT MIGRATION

The migration of older people for care is mainly discussed in studies on international retirement migration (IRM) emerging since the 1990s at the intersection of demography, sociology, geography, anthropology, and gerontology (Williams et al., 1997; King et al., 1998). Although IRM is a relatively small-scale phenomenon, its conceptual relevance is significant as it relates to broader societal changes such as aging populations, globalization, hypermobility, and individualization. The presumed declining reliance on personal networks of family and enhanced opportunities for bridging physical distances have made IRM a viable option in the changing imagination of old age in late modernity (Savaş et al., 2023). IRM has been reflected as a multifaceted topic. One strand of studies comes from transnational family research. It explores the mobility of older people seasonally visiting or permanently joining their emigrated kin, often children, to provide intergenerational support or receive care and support themselves (Baldassar, 2007). Studies of return migration discuss

the experiences of migrants who move to their countries of origin after retirement. One of the issues they face is the portability of their social protection rights across borders (Levitt et al., 2023, pp. 144–146).

A dominant topic in the IRM research is amenity-led or lifestyle migration, which has been debated as something between tourism and migration (Janoschka & Haas, 2013; Bender et al., 2014). Interest in this form of retirement migration centers on how relatively affluent older people navigate and negotiate their identities, aspirations, and social positions through mobility, thereby challenging traditional binaries between tourism and migration and illuminating the interplay between agency and structural conditions in migration processes (Benson & O'Reilly, 2009; O'Reilly & Benson, 2016). This type of IRM is generally related to the movement of older people from high-income to low-income countries with better climatic conditions and lower cost of living. It is fueled by a motive to raise the quality of life in pension by leisurely lifestyle, pleasurable activities, new interests, and protecting health (Levitt et al., 2023, pp. 135–136). It involves the relatively wealthy and well-educated retirees, sometimes referred to as “privileged migrants” or “long-stay tourists” (Croucher, 2012), who typically integrate into communities with co-ethnics coming from similar national and linguistic backgrounds and interact with the local population to a limited extent (Gavanas, 2017). By moving from richer to poorer countries, they capitalize on their superior purchasing power while maintaining ongoing ties with the home nation (Yeates, 2011).

Recently, Iorio (2020, pp. 198–200) has observed the entrance of new actors in IRM, e.g., Italian pensioners in precarious economic situations relocating to Bulgaria, the poorest country of the European Union, as an emerging destination. Moving to Bulgaria, where the cost of living is lower compared to Italy, enables the Italian pensioners to recoup a living standard that is no longer possible at home after the 2008 economic crisis, its reduction in public spending, and the rising cost of living. This phenomenon has been well documented in earlier studies on British retirees in Spain and Italy (King & Patterson, 1998; O'Reilly, 2000). Recent trends, however, suggest a reconfiguration of the European periphery, with Eastern and Southeastern Europe increasingly emerging as attractive retirement destinations. The free movement inside the European Union with entitlements to residence, work and health services for European Union citizens, and the difference in the cost of living between the East and West, makes “Eastern periphery” interesting and affordable for Western retirees facing financial constraints in their home countries.

Some countries purposefully put in place policies to attract migrant retirees because governments see them as potentially profitable. Moreover, Yeates (2011, pp. 1117) argues that poorer countries compete for a larger share of expanding international markets for wealthy retirees. In Bulgaria, Iorio (2020, pp. 199–200) found various internet sites promoting the country as a retirement destination for Italians, including web agencies assisting pensioners in finding a property to rent or purchase and in the administrative requirements related to relocation. Many

countries in Southeast Asia (for example, Malaysia, Thailand, and the Philippines), in Latin America (for example, Costa Rica, Panama, Ecuador, and Mexico), and in Europe (Portugal, Malta) have established government programs to promote IRM by facilitating visas or residence permits, and by offering tax benefits to foreign older people who settle in the country. Toyota & Xiang (2012, pp. 710–712) conceptualized these developments as “the transnational retirement industry,” which refers to business operations that are related to the international relocation of foreign retirees and has been led by three sectors: tourism, real estate, and care provision. They found out that the retirement industry in Asia has been endorsed and promoted by states as part of their national development strategies. IRM is welcomed, marketed, and brokered because it is believed to create lucrative opportunities for the retail, tourism, and healthcare sectors.

An emerging strand of studies points to a new type of IRM that concerns retirees needing care who seek an alternative to the precarious and expensive old-age care options in their home countries. It can be described as retirement care migration, and it refers to older people who need care, many of whom are frail or suffer from forms of dementia. Their care needs are complex, extensive, and expensive, and they can no longer arrange their care for themselves. Family members often decide to place them in a care home abroad (Schwiter et al., 2020). This type of IRM has been observed in older people from Germany and Switzerland who emigrated to live in residential care in Eastern Europe and Southeast Asia (Bender et al., 2020). Certain places, such as Thailand, are especially attractive for the affordable, intensive, and high-quality care they provide. Many care facilities in Thailand cater specifically to German-speaking countries and are marketed as built to “German or Swiss norms” (Schwiter et al., 2020). They offer individualized, 24-hour, one-to-one care arrangements, with an individual team of three caregivers available around the clock, with a high emphasis on care according to individual medical, social, and emotional needs, at prices that are generally much lower than in Germany and Switzerland (Bender & Schweppe, 2019).

Ormond & Toyota (2016) discussed the economic precariousness of retirees in combination with their growing care needs as a push factor for IRM. They argue that outsourcing care services toward peripheral areas is essentially driven by a decrease in the purchasing power of pensions within the national territory and is, therefore, a result of the restrictions imposed by the national welfare systems in the global North. Similarly, Toyota & Xiang (2012, pp. 712) point out that the cost of social and medical care is a common motivator for retirement care migration of Japanese retirees across socioeconomic status who relocate to Southeast Asia. The aging population in Japan creates a demand for intensive long-term care, which puts financial strains on the state and the families. Japan also faces a severe shortage of care labor. Japanese retirement care migration indicates the complex relationship between the national and the transnational. While the nation-bound welfare model seems unsustainable due to the aging demographic and economic stagnation, state

welfare—through its well-established national pension scheme, which provides retirees with relatively stable consumption capacity—is a precondition for developing the international retirement industry. The recruitment agencies in Malaysia, Thailand, and the Philippines systematically target countries with well-developed pension schemes. With the development of old-age care markets comes the redirection of purchasing power and other forms of economic activity, as well as substantial relocations of social and healthcare costs to the destination country (Yeates, 2011).

Although lower cost of care seems to be the primary motivation for retirement care migration, studies show that it is not the only one. The appeal of care facilities designed for retirement migrants in peripheral countries also stems from a good staffing situation, including high staff ratios and qualified staff. Accordingly, the facilities promote high-quality care, paying special attention to individualized, flexible, and professional care in a familial atmosphere. Integrated care concepts are implemented that, in addition to good medical care, also include the social and emotional components (Bender et al., 2014). These care markets seem to systematically appropriate the Western ideals of “good care” and address the structural constraints and weaknesses faced in the Global North, such as the lack of time and staff, institutional logic of care, high prices, etc. However, available, affordable, and extensive care is provided due to lower wages and lower cost of living in the periphery, while the poverty-driven provision of emotional labor counters emotional and intimate limitations. These high-end facilities are often beyond the reach of local older people who are offered scarce old-age services, if any (Schwiter et al., 2020; Levitt et al., 2023).

METHODS

Retirement care mobility from Slovenia to Croatia has yet to gain recognition in research and policy debates. Since the phenomenon has not yet been researched, our approach was exploratory. Our empirical evidence is based on individual interviews conducted in 2023 and 2024 in several small towns in the border region of both countries in question (for reasons of anonymity, we do not disclose the towns). We conducted interviews with a range of diverse actors to illuminate the phenomenon from multiple perspectives—state, social work, professional expertise, care home management, and care workers with experience on both sides of the border. We aimed to capture a broad spectrum of views, encompassing policy and systemic aspects, procedural issues, and concrete experiences. Due to the diversity of the interviewees, each possessing distinct knowledge about the phenomenon, we employed semi-structured interviews, tailoring the interview guides to each participant. The thematic scope of the interviews included the institutional arrangements of care for older people in both countries, the scale and types of care mobilities, specific procedures of relocation and placement, daily care routines, cost of care, cooperation with families, and the role of the border in structuring care practices.

In Slovenia, individual semi-structured interviews were conducted with three care home managers and a social worker in a hospital; two nurses daily commuting from Croatia for work in care homes in Slovenia, both with experiences in care homes in Croatia; a representative of the Association of Social Institutions of Slovenia, and a policymaker at the Ministry of Labor, Family, Social Affairs and Equal Opportunities (MDDSZEM). In Croatia, we interviewed an expert on the care system for older people, who also runs a placement agency, and a manager of a private residential care facility close to the Slovenian border, who has long-term experience with the placement of older people from Slovenia. Interviews lasted between 30 and 65 minutes and were recorded and transcribed upon the interviewees' informed and signed consent and thematically analyzed. The institutional analysis was informed by both primary data from interviews and secondary sources, including our own previous research, existing academic literature, and national and international studies.

AN OUTLINE OF THE RETIREMENT CARE MOBILITY FROM SLOVENIA TO CROATIA

The interviewed expert from Croatia said there are many Slovenian citizens in Croatian residential care, especially near the border, and there is a particularly high demand for care for people with dementia. Although the facilities are advertised on local radio stations, this is unnecessary because of high demand. The residential care facility in Croatia where we interviewed the manager has a capacity of 50 residents, 14 of whom are Slovenian citizens. According to the director, residents come not only from the border regions but also from the interior of Slovenia, including Ljubljana.

Media coverage frames this care mobility as a critique of the Slovenian care system, citing high prices and long waiting lists. In contrast, Croatian residential care is portrayed as significantly more affordable—costing about half as much as Slovenia—and immediately available (Držaj, 2017; Zore, 2018; Čeh, 2019). The media also highlights positive aspects of Croatian residential care, such as a sense of homeliness, community, and family. The small size of Croatian residential care facilities and the involvement of users in everyday activities such as working in the kitchen, in the fields, in the vineyards, and participating in the preparation of meals are said to contribute to this (Kramberger, 2016; Srpčič, 2018).

However, our interviews conducted on both sides of the border reveal a different picture, highlighting inadequate treatment of residents, unsuitable spatial arrangements for users with reduced mobility, and insufficient medical care. They point out that accommodation in Croatia is substandard and that “Residential care in Croatia cannot compare with services in Slovenia” (MDDSZEM). Users from Slovenia keep their family doctor in Slovenia, where they undergo medical check-ups and receive medications, as Croatian residential care does not include health care services. Residential care managers on the Slovenian side pointed out, “Users who need more

complex medical care return to Slovenia from Croatian facilities.” In emergencies, they can be treated in Croatian hospitals using the European Health Insurance Card (EHIC) and supplement payment. Transport to Slovenia by ambulance is very expensive because the EHIC does not cover cross-border transport. The Slovenian social worker from the hospital told us, “Croatian residential care facilities discharge a person whose health deteriorates seriously, put them in a car, and send them to Slovenia. We often admit people from Croatia with extremely deteriorated health conditions.” One residential care manager said that they had admitted users from Croatia: “One lady, I remember, was immobile and was on the second floor in a house without a lift; basically, the standard is quite unsuitable for care. We received two ladies in poor condition, with wounds.” The director of a Croatian residential care facility reflected critically on the situation in Croatia:

You have quite a lot of family residential care facilities that take up to 20 users, which unfortunately don't have the conditions; they don't have the staff. Even though it was a nice idea for the family to be involved in this business, you as a family cannot take care of twenty old and helpless people. You must have a nurse because these people need medical care.

Rather than assessing the extent or quality of care mobility of older people from Slovenia to Croatia, our analysis aims to use institutional analysis for a clearer understanding of these dynamics and to reveal the interplay of the push and pull factors that sustain this form of transnational care.

INSTITUTIONAL ANALYSIS OF CARE FOR OLDER PEOPLE IN SLOVENIA AND CROATIA AND THEIR CO-EFFECT

In Slovenia, the population aged 65+ was 21.4% in 2023. Besides family care, the central pillar of care is the public/private network of residential care, which provides placement for 4.8% of older people (Skupnost socialnih zavodov Slovenije, 2022). Residential care facilities offer integrated services, including access to family doctors on-site, physical and occupational therapy, and various social activities. They strive to engage with their local communities through cultural events, intergenerational cooperation, and the promotion of voluntary work (Mali, 2008).

In the 1990s, a mixed economy of services was introduced, and the number of private residential care facilities has increased rapidly since then. They are included in the public network and are subject to the same quality standards as public residential care but charge up to 30% higher prices to recoup their investment (Hrženjak, 2019).

The cost of residential care is individualized as only 30% of funding comes from the public health care budget. In comparison, 70% is paid by the users and their families, who are legally bound to co-payment. Because of a high poverty rate among

older people, in particular women (Leskošek, 2019), working and middle-class families often cannot afford to pay for residential care. The municipality subsidizes costs for users if they have no relatives or those they do have cannot pay; however, these subsidies are later recovered from the inheritance. This further complicates the situation as older people and their families do not opt for a subsidy to avoid losing property (Hrženjak, 2019).

While the state promotes aging in place, it offers little support for its implementation. Public home care services are 50% subsidized, but they remain underdeveloped. Only 1.8% of older people receive home care services on an average of 3.5 hours per week (Kovač & Petrič, 2023). Due to insufficient capacity, waiting lists exist for both residential care and home care services. Furthermore, low wages and high workloads contribute to high turnover rates and staff shortages, so providers are often forced to decline new users (Skupnost socialnih zavodov Slovenije, 2024).

In such a situation, family members, primarily women, are pushed into providing most of the care. However, a dual-breadwinner full-time employment regime places Slovenia among the countries with high labor intensity put on women, which makes family care unsustainable. The Long-Term Care Act, prepared by successive governments since 2002 and finally adopted in 2023, exemplified the long-standing political marginalization of senior care and the deflection of responsibility for population ageing onto families. Inadequate policies create a huge care gap. While the informal care market is booming, another strategy is to place older people in residential care in Croatia, which is also observed in the Social Inspection report:

In inspections in 2016–2020, providers of residential care for older people in the public network, social work centers, as well as providers who provided the service without the appropriate legal basis, reported that relatives of older persons, instead of placing them in residential care in the vicinity, placed them with individuals in the immediate vicinity or with families and providers of similar activities in Croatia and Hungary. They are often seriously ill persons or persons with dementia placed in this way by their relatives. The relatives justify their actions on the grounds that they are unable or unskilled to care for such a relative, that the public network providers are too expensive, and that they have already submitted applications for admission, but the public network placements are full.

In 2016–2019, relatives also expressed their dissatisfaction and distrust in exercising the right to the care allowance and the right to exemption from payment for social care services. This was due to their poor financial and property situation and concerns with the municipality's right to register a lien on the property in the Land Register in the case that the municipality covers part of the costs of care and later makes a claim against the beneficiaries to recover these funds (Socialna inšpekcija, 2021, p. 21).

The Ombudsman's press release (Varuh človekovih pravic RS, 2018) suggests that this transnationalization of care is systemic: "It often occurs that relatives of applicants for accommodation, residential care facilities, and social work centers in extreme need are looking for a solution in accommodation in residential care for older people outside Slovenia, most often in Croatia. They also send older people there who can no longer pay the care fees."

In Croatia, 22% of the population is older than 65 years. Care relies heavily on informal family care provided by women. Home care services are only available in a few bigger cities and are afforded by about 0.5% of older people (OECD, 2023). Like Slovenia, Croatia is facing a significant shortage of care workers. The number of formally employed workers in long-term care reaches only 1.7 per 100 people aged 65+, compared to 3.8 for the EU-27 (Bađun, 2024).

Less than 3% of older people receive residential care compared to an OECD average of 4% (OECD, 2023). Residential care is divided into state-run or public facilities and private or market-run facilities. Six hundred eighty-one providers provided residential care in 2023. Only three were state-run, 54 were established by local authorities, and 624 were privately run (Gradonačelnik.Hr, 2023). The government only subsidizes placement in public residential care, but subsidies are given under non-transparent criteria and are not means-tested. This causes extremely long waiting lists in public residential care due to limited capacities (Bađun, 2024). In transition, the state has left the creation of new residential care facilities entirely to private market initiatives. To obtain a license to operate, private residential care facilities, which can provide care for 20 to 50 users, have to meet the minimum conditions for the provision of social services, while the providers themselves set the price according to market conditions (Manojlović, 2020). The state does not subsidize placement in private residential care; the user has to pay the full price, which is two or three times higher than public residential care. The expert on the system of care for older people who also runs a placement agency in Croatia said in our interview:

In public residential care in Zagreb, a single room costs €490 because it is subsidized. The waiting period for placement is between 10 to 15 years. In a new private residential care in Labin, the price is between €1,200 and €1,800, depending on the level of care. Prices for private residential care vary by region. The most expensive are in Zagreb, Split, and Istria. The rural areas, Slavonia and Croatian Zagorje, are the cheapest.

Croatia has one of the highest rates of older people living below the poverty threshold among the European Union countries, amounting to 31% (Klempić Bogadi & Podgorelec, 2024), so most older people cannot afford private residential care. The manager of a private residential care facility in Croatia said in our interview that mainly returning migrants and old people whose children have emigrated abroad and are financially supporting their parents can pay: "We have many pensioners who don't

have a Croatian pension but have an Austrian, German, Swedish, Slovenian pension that they can use to pay for private residential care. Or their children work abroad.”

The state addressed the problem of care for older people with low pensions by deregulating residential care. As Manojlović (2020, p. 110) demonstrates in her study of the Croatian system of care for older people, in 2003, the state authorized the operation of family residential care homes (Croat. *obiteljski domovi*), which are officially classified as non-institutional forms of care intended to resemble home care, but are not subject to state control. Family residential care is organized in purpose-built apartment houses and can accommodate between 5 and 20 users. The homeowner or a family member with at least a secondary vocational education can provide care. Other people may also be employed, and non-employed family members may participate in care. The facility must have a maximum of 3-bed rooms with a minimum of 4 square meters per person, heating, ventilation, and daylight, and include a food preparation and serving area (Manojlović, 2020, p. 111). The number of family residential care facilities has been increasing steadily since 2003. In 2024, there were 404, and they provided more than 6,000 placements (about 20% of all existing placements in Croatia) and employed about 2,000 persons (Udruga obiteljskih domova, 2024). Family residential care facilities are most common in small towns and rural areas, where just a few years ago, the cheapest accommodation cost as little as €150–250 (Manojlović, 2020, p. 117). Our interviews indicate that today, the average price of family residential care ranges between €400 and €600, and between €600 and €800 in better-equipped facilities. Due to high demand, the increasing number of immobile users, and rising labor costs, prices in family residential care are expected to increase rapidly. The deregulation of family residential care, combined with the absence of state oversight and care standards, allows for flexibility in pricing based on the local environment and demand.

Croatia has thus privatized residential care, leaving it to the market. By issuing work permits, two types of private residential care facilities have emerged: the slightly regulated, larger, and more expensive facilities for the wealthy and the highly deregulated, family residential care facilities for the poor. This confirms the indications from the interviews that care in family residential facilities can be precarious compared to care provided in both public and market-based facilities in Croatia, and even more so when compared to standards in residential care in Slovenia. Family residential care facilities are typically understaffed; care is de-professionalized, unsupervised, and lacks medical services. It is limited primarily to basic monitoring and accommodation in private houses, which are often not adapted to the needs of older people.

As a rule, eligibility for a nation-state’s social protection requires membership (i.e., citizenship) and residence within its territories (i.e., territoriality) (Levitt et al., 2023, p. 9). The deregulation of private residential care and its placement on the market outside the public service network is thus central to the transnationalization of care. Slovenian citizens cannot be placed in public residential care facilities

in Croatia; however, they can access private facilities, which operate not according to the logic of citizenship and territoriality but according to the logic of the market and the user's purchasing power. As we learned from the interviews, older people cared for in private residential facilities in Croatia retain their permanent residence in Slovenia, which is a prerequisite for continuing to receive health and social protection benefits. In Croatia, they declare temporary residence at the residential care facility where they receive social care services. In this arrangement, they continue to access health and social benefits in Slovenia based on the logic of citizenship and territoriality while purchasing social care in Croatia according to the logic of the market and their purchasing power. In doing so, they are generating a precarious and hybrid model of transnational care (Levitt et al. 2023, p. 4). Such care is hybrid because it uses two different logics of the access to services, i.e., citizenship and the market; it is transnational because it takes place in two countries and requires regular back-and-forth movements; and it is precarious because it is driven by necessity, and the standards of care in Croatia—particularly in family residential care—are lower than those in Slovenia (UN Women Training Centre, 2014).

Croatia, which is “solving” the care gap in its own country through the privatization and deregulation of care, has thus inadvertently, as a by-product, produced “solutions” to the care gap in its neighboring country. As Toyota and Xiang (2012) argue, transnational care is not necessarily a consequence of globalization but can emerge by chance because of the co-effect of specific institutional configurations of two or more countries. However, this institutional configuration is changing in both countries. In Slovenia, the Long-Term Care Act, intended to provide for a larger share of co-financing of care and a larger extent and diversity of public services, will fully enter into force in 2026. In Croatia, numerous reports of poor performance, maladministration and neglect have led to the decision to abolish family residential care by 2026. It will be interesting to see how these changes will affect the transnationalization of care between the two countries.

CONCLUSION

Using the concepts of care gap, the transnationalization of care, and retirement migration, and based on individual interviews with stakeholders and institutional analysis, we explored retirement care migration from Slovenia to Croatia. It is driven by geographical, language, and social proximity, which is typical of a border region. However, as the institutional analysis in both countries clearly showed, it is also driven by the co-effect of the specific institutional configuration of the two neighboring countries.

Existing research on retirement care migration highlights the motivation to find more affordable care and a better quality of care than the one available in the home country. In comparison to high costs of care, understaffing and time-pressured

working conditions, a lack of focus on older people's needs, and a dearth of individual care in services in home countries, residential care in the Global South offers high-quality, professional, holistic, and individualized care arrangements (Bender et al., 2014; Bender et al., 2018; Schwiter et al., 2020). This reflects the global inequalities because it means that average pensioners in one country can become high-power consumers in another, which is a significant driving force behind the retirement care industry. Cheaper and better quality care results from wage differentials and the lower cost of living in the destination countries. The non-affordable Western ideals of old-age care in the country of origin are shifted to lower-wage countries, thus "solving" cost burdens in rich countries by exploiting global economic inequalities. These migratory dynamics emanate from both relatively wealthier retirees and those in precarious economic situations but still having greater consumer power than locals.

Our study of retirement care migration from Slovenia to Croatia, in the specific context of the two post-transition countries on the periphery of the European Union, both facing rapid population aging and neoliberal restructuring of the welfare state, shows a different picture. Institutional analysis shows that retirement care migration from Slovenia to Croatia is fueled by the scarcity of public services, the high poverty rate in old age, and individualization of care costs, which particularly burden families in weak socioeconomic situations. The class aspect is accentuated on the European margins. The privatization and deregulation of care in Croatia have produced family residential care—a unique combination of market-based residential and informal family care. As the most affordable option, it fills the care gap for poor older Croatians who are excluded from subsidized public residential care services due to limited availability and priced out of private residential care options due to the high cost. Slovenian citizens use both types of Croatian private residential care according to their purchasing power. However, both types, particularly family residential care, provide services to significantly lower standards than Slovenian residential care regarding the qualifications and number of staff, the quality and adaptability of accommodation, health care, supervision, etc. Although retirees from Switzerland or Germany, even if from weaker economic groups, receive better-quality care for a significantly lower price in Thailand than at home (Bender et al., 2014; Bender et al., 2018; Schwiter et al., 2020), Slovenian citizens, including those from the middle class, receive significantly worse care in Croatia than at home for only a slightly lower price. Therefore, paraphrasing a concept of hybrid transnational protection (Levitt et al., 2023, p. 4), we have called the retirement care migration from Slovenia to Croatia a precarious hybrid transnational care because, as transnational care recipients, the care users partly receive old-age care in their source country according to the logic of citizenship, and partly in the country of destination in the form of services according to the logic of the market, and their purchasing power. However, this care does not align with the standards of their home country. It insufficiently addresses their health needs and is often the outcome of constrained decision-making shaped by the care gap in Slovenia.

Although the transnational extension of welfare is necessary in times of global migration, the case of retirement migration from Slovenia to Croatia shows that it can be problematic if its drivers are the neoliberal economization of welfare: the downsizing of the role of the state in providing care, privatization, and deregulation. In this scenario, individuals are no longer viewed as citizens entitled to equal rights but as consumers purchasing services in the global market. The market transforms into an increasingly important source of social welfare and reaches out to international users, too. However, the market as a source of care is highly stratified and precarious since it depends on individuals' purchasing power. The state, which in this vein maintains the public cost of care at a low rate, withdraws from regulating the services so that the market functions more efficiently and profitably. The transnationalization of care appears as the "solution" because it allows for the outsourcing of care labor either by its extraction from (in care workers migration) or by its externalization to (in retirement care migration) the women from poorer countries, whose care labor is cheaper.

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POVZETEK

ISKANJE OSKRBE V SOSEDNJI DRŽAVI: INSTITUCIONALNA ANALIZA TRANSNACIONALNE OSKRBE STAREJŠIH LJUDI MED SLOVENIJO IN HRVAŠKO

Majda Hrženjak

Upokojenska migracija je relativno novo raziskovalno področje, ki obravnava tudi emigracijo starejših ljudi, ki iščejo cenejšo in bolj kakovostno oskrbo, kot jim je dostopna v državi izvora. Avtorica z uporabo konceptov skrbstvene vrzeli, transnacionalizacije oskrbe in upokojenske migracije analizira skrbstveno mobilnost starejših ljudi iz Slovenije na Hrvaško v specifičnem kontekstu dveh sosednjih posttranzicijskih držav na obrobju Evropske unije, ki se soočata s staranjem prebivalstva in neoliberalizacijo države blaginje. K tovrstni mobilnosti prispeva geografska, jezikovna in socialna bližina, značilna za obmejno regijo. Empirični podatki, pridobljeni s polstrukturiranimi intervjuji z deležniki in institucionalno analizo, pa kažejo, da jo spodbuja tudi součinkovanje specifične konfiguracije institucionalnih vrzeli v oskrbi starejših ljudi med obema državama. V Sloveniji se skrbstvena vrzel kaže v visokih in individualiziranih stroških oskrbe, v revščini upokojenih ter v pomanjkanju javnih storitev in njihovi kadrovske podhranjenosti. Na drugi strani je Hrvaška privatizacijo in deregulacijo oskrbe slednjo prepustila trgu in sprožila nastanek dveh tipov zasebne domske oskrbe: delno regulirane, večje in dražje domove za premožne ter družinske domove, ki jih umešča v neinstitucionalno oskrbo in jih država zato ne nadzoruje. Družinski domovi so kot najcenejša oblika oskrbe dostopni revnim. Državljeni Slovenije uporabljajo oba tipa zasebnih domov na Hrvaškem glede na svojo kupno moč. Vendar oba tipa domov, zlasti pa družinski domovi, izvajata oskrbo po bistveno nižjih standardih kot veljajo v Sloveniji, in sicer tako z vidika usposobljenosti in števila osebja kot z vidika kakovosti in prilagojenosti namestitve, dostopnosti zdravstvene oskrbe, različnih aktivnosti, nadzora ipd. Tako se vzpostavlja oblika oskrbe, ki jo avtorica opredeli kot »prekarna hibridna transnacionalna oskrba«. Starejši ljudje, ki zaradi oskrbe migrirajo iz Slovenije na Hrvaško, v državi izvora še naprej prejemajo zdravstvene storitve in socialne prejemke po logiki državljanstva, na Hrvaškem pa kupujejo institucionalno oskrbo po logiki trga in svoje kupne moči. Taka oskrba je hibridna, ker uporablja dve različni logiki dostopa do storitev – državljanstvo in trg; je transnacionalna, ker poteka v dveh državah in terja redno prestopanje državne meje; in je prekarna, ker so standardi oskrbe na Hrvaškem slabši kot v Sloveniji, ker ne izpolnjujejo v zadostni meri potreb uporabnikov in ker je izbira tovrstne pogosto prisilna, torej rezultat skrbstvene vrzeli v Sloveniji.

Hrvaška, ki z deregulacijo in privatizacijo oskrbe »rešuje« skrbstveno vrzel v svoji državi, je tako nenamerno, kot stranski produkt, proizvedla »rešitve« tudi za skrbstveno vrzel v sosednji državi. Študija pokaže, da transnacionalizacija oskrbe ni nujno posledica procesov globalizacije, temveč lahko do nje pride naključno, kot posledica součinkovanja med specifičnima institucionalnima konfiguracijama oskrbe med dvema državama.

REPRESENTATIONS AND CONFIGURATIONS OF MULTICULTURALISM IN LOUIS ADAMIČ'S *THE NATIVE'S RETURN*

Darko Ilin¹

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ABSTRACT

Representations and Configurations of Multiculturalism in Louis Adamič's *The Native's Return*

In his work *The Native's Return* (1934), Louis Adamič navigates the complexities of multiculturalism, drawing on his experiences in both the polyethnic United States and the multinational Kingdom of Yugoslavia. The article explores Adamič's multicultural awareness in his writings on Yugoslavia's customs, social relations, culture, and politics. This analysis will provide insightful perspectives on Adamič's representation of Yugoslavia in the American public sphere and how his American experience influenced his views on Yugoslav cultural and political situations.

KEYWORDS: Louis Adamič, *The Native's Return*, multiculturalism, return, cultural pluralism

IZVLEČEK

Reprezentacije in konfiguracije multikulturalizma v delu *Vrnitev v rodni kraj* Louisa Adamiča

Louis Adamič v svojem delu *Vrnitev v rodni kraj* (1934) raziskuje kompleksno naravo multikulturalizma, pri čemer se opira na svoje izkušnje iz polietničnih ZDA in multinacionalne Kraljevine Jugoslavije. Avtor v prispevku raziskuje Adamičevo multikulturno zavest v njegovih delih, ki govorijo o običajih, družbenih odnosih, kulturi in politiki Jugoslavije. Njegova analiza ponuja vpogled v Adamičevo reprezentacijo Jugoslavije v ameriški javni sferi ter pokaže, kako je njegova ameriška izkušnja oblikovala njegove poglede na jugoslovanske kulturne in politične razmere.

KLJUČNE BESEDE: Louis Adamič, *Vrnitev v rodni kraj*, multikulturalizem, vrnitev, kulturni pluralizem

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INTRODUCTION

This study examines representations and configurations of multiculturalism within Louis Adamič's work, *The Native's Return*. A comprehensive exploration of the theoretical framework underpinning multiculturalism thus becomes imperative. The multicultural state, multiculturalism, and cultural diversity, far from constituting novel phenomena, are intrinsically linked to fundamental societal concepts such as nation and ethnicity. Likewise, these concepts are inherently intertwined with the binary opposition of self/other, specifically, with the notions of otherness and difference/diversity, which form the foundational basis for comprehending interpersonal relationships within society (cf. Strumska-Cylwik, 2013; Gaupp, 2021). The theoretical discourse about cultural diversity as the coexistence of distinct communities whose identities were shaped by affiliations with specific groups, nations, or religions coalesced in the 20th century. Multiculturalism, as a term, has consistently carried both theoretical and activist political connotations. Consequently, it becomes essential to address not only multiculturalism but also cultural pluralism as two interconnected theoretical frameworks. Moreover, it is crucial to examine how these frameworks aspire to manifest themselves in both an engaged and a political context.

The term "multiculturalism" is intricate and marked by ambiguity, as it can signify a tangible cultural and social reality when various ethnic communities coexist within the same state (Lukšič Hacin, 1999, p. 15). This significance is underscored at the linguistic and lexical levels in specific languages as is exemplified by distinctions, such as those, for instance, in Serbian between "*multikulturalnost*" and "*multikulturalizam*" (Mesić, 2006, p. 70). This linguistic nuance corresponds to the divergence between "multiculturality" and "multiculturalism," with the former denoting the aforementioned social situation. Stuart Hall has similarly advocated for a distinction between the adjective "multicultural," indicating social situations, and the noun "multiculturalism," representing policies and strategies governing such societies (Hall, 2000, p. 209). Therefore, multiculturalism can be understood as a normative-descriptive category (Lutovac, 2020, p. 347), seamlessly integrating both facets of its meaning at all times.

However, the term multiculturalism can be comprehended theoretically, signifying a specific relationship between different ethnic communities coexisting within the same state. Within this theoretical framework, alongside multiculturalism, other notions such as cultural pluralism, interculturalism, and transculturalism can be identified (Lukšič Hacin, 1999, p. 15). Despite the apparent similarity and frequent interchangeable use of these terms, it is crucial to recognize them as distinct concepts. They denote similar but, in many respects, different theoretical systems and worldviews concerning the possibility of the coexistence of multiple communities within the same space. Multiculturalism debuted in 1963, while cultural pluralism emerged in the early 20th century (Lukšič Hacin, 1999, p. 84). This

temporal distinction suggests that multiculturalism can be perceived as a phenomenon rooted in cultural pluralism. On the other hand, terms like intercultural and transcultural are more recent, directly emanating from the principles of multiculturalism. However, they are subject to criticism as attempts to reshape and adapt to the needs of modern times. It is essential to cautiously approach any one-sided rhetoric suggesting that multiculturalism is merely a transitional phase leading to interculturalism. This perspective overlooks the parallel development of both theoretical systems, as they borrow concepts from each other, collectively contributing to the evolution of thoughts about a society determined by pluralism and diversity.

The third dimension of understanding multiculturalism arises within the political context. For instance, in the 1960s and 1970s, countries like Canada, Australia, and Sweden adopted official plans to foster the development of a multicultural society. Consequently, multiculturalism involves formulating, implementing, and assessing multicultural policies (Lutovac, 2020, p. 347). The crux of the multicultural policy lies in achieving a sustainable balance between promoting the social integration of minority cultures and implementing anti-assimilation measures (Bašić, 2018, p. 9). In essence, the concept of multiculturalism as a social policy represents a pragmatic realization of the theoretical underpinnings of multicultural theory. This implies that multiculturalism consistently navigates between two poles: the descriptive aspect, reflecting the current societal situation, and the pragmatic and potential aspect, envisioning improvements to the present state. Thus, multiculturalism emerges as an ongoing, elusive, and fragmented concept in a perpetual oscillation between its current state and its potential evolution.

LOUIS ADAMIČ AND MULTICULTURALISM

Considering that multiculturalism as a political notion emerged only in the latter half of the 20th century, while the theory of cultural pluralism was established by Horace Cullen as early as 1915 (Lukšič Hacin, 1999, p. 84), categorizing Louis Adamič as an advocate of multiculturalism presents a methodological challenge, leading to a possible anachronism. Therefore, it appears more accurate to characterize Adamič as a proponent of cultural pluralism due to the period in which he operated. However, it is crucial to recognize that Adamič aligned with Cullen's utopian vision of a harmonious society achievable through ethnic diversity. However, he did not endorse Cullen's essentialist perspective on the inviolability of ethnic identity (Shiffman, 2005, p. 59). Adamič posited that a nation cannot construct its identity solely on a specific cultural tradition or the aggregate of its diverse traditions, as identity is an ongoing process (Žitnik Serafin, 2012, p. 79). Adamič's comprehension of identity, culture, tradition, Americanization, and integration is more nuanced and process-oriented, aligning closer to contemporary concepts influenced by postmodern relativism. That is why we will continue to use the notion of multiculturalism in the context of this paper,

even as we acknowledge the potential limitations and anachronisms of applying it retroactively. This choice allows for a more coherent exploration of Adamič's ideas within a broader, contemporary framework while remaining mindful of the historical and theoretical context in which his work was situated.

Adamič's engagement in multiculturalism studies and his pursuit of its objectives are situated within the context and tradition of the United States, constituting the central theme of Adamič's work. He focuses on the identity of the United States, arguing that the constant influx of migrants continually challenges and reshapes what it means to be American. The philosophies of the early 20th-century cultural pluralists profoundly shaped Adamič's understanding of diversity. These philosophers rejected the notion of an American race defined by Anglo-Saxon blood and culture, opting instead for a perspective that envisioned the nation as a mosaic of diverse ethnic communities speaking various languages and preserving traditions from their homelands. Together, these elements contribute to enhancing the American identity (Enyeart, 2015, p. 60). Influenced by such a stance and marked by his own migrant experience, Adamič adeptly merged the theoretical and practical dimensions of cultural pluralism.

In his most significant works, Adamič delved into the intricacies of the migrant experience, addressing this theme in his autobiographical pieces such as *Laughing in the Jungle* (1932) and his sole novel, *Grandsons* (1935). Additionally, he explored these themes in numerous essayistic works, articles, and documentary narratives published throughout his career. Adamič's interest extended to the psychological, cultural, and political dimensions of migration, contemplating how the migrant experience contributes to the collective identity of a multiethnic nation like the United States. As proponents of cultural pluralism critiqued the uncritical process of Americanization, a call emerged for a considerate and well-planned policy fostering migrant integration. While Adamič supported integration, he diverged from endorsing homogenization (Shiffman, 2005, p. 77). His perspective on emigration and migration reflected a utopian vision of equality, wherein the state would be obligated to afford all migrants identical rights and opportunities for self-realization, ensuring their inclusion in American society. Crucially, Adamič seamlessly interconnected the advocacy for labor rights with the rights of migrants, showcasing a remarkably comprehensive understanding of the challenges within American society.

At the outset of the 20th century, Adamič was not the sole advocate of cultural pluralism in the United States; notable figures such as Horace Cullen and John Dewey also played significant roles. Nevertheless, Adamič occupied a distinctive position among them due to his multifaceted engagement with and questioning of the concept of the melting pot. Firstly, Adamič brought his own migrant experience to the forefront, serving as a foundational standpoint for his perspectives. Secondly, he concurrently considered the narratives and encounters of other migrants throughout the United States who recounted the pressures imposed by

the melting pot concept (Orosco, 2016, p. 40). This implies that Adamič's ideas were grounded in a deeply felt and internalized migrant experience, allowing him to challenge the notion of forced assimilation more comprehensively and with greater self-awareness. His commitment to and focus on immediate personal experience are evident in his preference for direct contact with people. Their stories not only inspired his writing but also provided a profound insight into the specific American situation.

Adamič's perspective on American society is notably infused with communist ideas to a greater extent than the perspective of other liberals of his time. He envisions America as a collective of diverse ethnic and cultural communities, each free to uphold its unique practices and traditions. Simultaneously, these communities can engage in collaborative, intercultural dialogues to foster a profoundly democratic culture that incorporates the multitude of their individual resources, skills, and insights (Orosco, 2016, pp. 44–45). Adamič emphasizes the potential for cooperation among these diverse communities to collectively contribute to forming a society and culture that transcends a mere summation of its components. Rather than a patchwork, he imagines the emergence of a new, enriched culture—one that offers a more inclusive and fulfilling environment for everyone.

While Adamič avoids framing the discourse in terms of minorities and dominant groups, he acknowledges the dialectical relationship between the "ideal" Anglo-Saxon American population and the numerous immigrants. He recognizes that forced assimilation has detrimental effects on both migrants and the dominant population. Consequently, Adamič advocates for mutual assimilation, positing that representatives of the Anglo-Saxon community should integrate into migrant communities in a reciprocal manner (Adamic, 1940, p. 308). This innovative viewpoint reflects Adamič's unique perspective on the American situation, its cultural pluralism, and, ultimately, multiculturalism.

In his seminal work on Adamič titled *Rooting Multiculturalism*, American researcher Dan Shiffman underscores the significance of both Adamič's theoretical contributions and his activist endeavors in shaping and fostering multiculturalism. Shiffman recognizes the overlapping nature of the concepts of multiculturalism and cultural pluralism and endeavors to tease out the distinctions between them. However, he faces challenges in categorizing Adamič within a specific stream because Adamič, originating from cultural pluralism, transcends it and aligns more closely with the evolving perspective of multiculturalism (Shiffman, 2005). Adamič's thoughts on cultural relations demonstrate advancements beyond the theoretical frameworks of his time. One notable instance is his unwavering commitment to the idea that people should move beyond a liberal culture of tolerance and instead embrace a profound democratic culture of acceptance (Orosco, 2016, p. 45). This notion remains remarkably forward-thinking and relevant in the 21st century.

CONFIGURATIONS OF MULTICULTURALISM IN *THE NATIVE'S RETURN*

In his influential work *Multicultural Citizenship: A Liberal Theory of Minority Rights*, Will Kymlicka (1995) draws a key distinction between multinational and polyethnic states, two forms of multiculturalism that, while related, have different historical origins. Although both reflect the presence of (ethno)cultural diversity in contemporary societies, they arise in different ways. For example, multinational states emerge either through voluntary unions or due to conquest. In contrast, polyethnic states are shaped primarily by immigration. Kymlicka also notes that many states display features of both models (Kymlicka, 1995, pp. 11–26). Louis Adamič had firsthand experience with both types of countries. His primary focus was on the polyethnic United States of America. Yet, in his work *The Native's Return*, he delves into the multinational context of the Kingdom of Yugoslavia, which emerged from the efforts of South Slavs after World War I.¹

Having immigrated to the United States from what was then Carniola at the age of fifteen, Louis Adamič, as Jelena Šesnić argues, exemplifies a range of identity strategies within the framework of transculturation. His dynamic engagement with American society reflects both a personal negotiation of identity and a broader effort to model forms of social life for immigrant communities, particularly among first- and second-generation immigrants (Šesnić, 2018, p. 191). Taking into account Adamič's experience of having resided in both the polyethnic environment of America and the multinational context of the Kingdom of Yugoslavia, an intriguing avenue of investigation involves delving into how his life in the multiethnic American setting shaped his perspectives on multiculturalism within a multinational state such as Yugoslavia.

It should be recognized that Adamič's multicultural experience fundamentally shapes not only *The Native's Return* but his entire body of work. The full original title of the book is *The Native's Return, An American Immigrant Visits Yugoslavia and Discovers His Old Country*, suggesting that the focal point of the work is the narrator's intercultural experience. At the same time, Adamič's strategic use of his own dual position of expatriate and "returnee," a "local," as implied by the title of his memoir-travel work, deserves critical attention (Šesnić, 2018, p. 200). The primary genesis of the book is a return to the native country, not merely for the sake of travel but also for the purpose of research. During his nearly one-year-long visit, Adamič endeavors to acquaint himself with Yugoslavia and "discover" it. His objective is to gain a more precise understanding of the situation in his native country and, simultaneously, to present to English-speaking readers a newly established state that was inadequately known to the public. The existing information about Yugoslavia largely originated from foreign sources that may not have fully comprehended the country and its people.

1 It should be noted that Adamič had the experience of living in yet another multinational state during his childhood: the Austro-Hungarian Monarchy. By all indications this marked his upbringing and fostered an interest in multicultural state formations.

The central concept for grasping Adamič's transcultural experience in this work is the notion of "return," inherently tied to the experience of migration. Considering Adamič's active involvement in shaping the Yugoslav diaspora,² it is crucial to perceive him as an integral part of the Yugoslav diaspora in America. Supposing that at "the core of the concept of diaspora lies the image of a remembered home" (Stock, 2010, p. 24), Adamič's visit³ to his homeland can be interpreted as an endeavor to reconstruct the memory of home and, consequently, to provide a narrative recount of his native land. However, this interpretation only partially captures the complexity of his journey. The personal, intimate dimension of his homecoming is most evident in the early stages of his visit, particularly during his stay in Carniola. The remainder of his travels through various regions of the Kingdom of Yugoslavia takes on a more touristic and investigative character, an effort to acquaint himself with a broader idea of the homeland. Importantly, Slovenia was not part of Yugoslavia when Adamič emigrated to the United States, as the Yugoslav state did not yet exist. Hence, his return must be viewed in a distinct context. Sometimes, returning to the native country and maintaining social ties with the homeland becomes a means for the returnee to cultivate cultural capital (Marschall, 2018, p. 12). In this manner, Adamič, having established himself as an immigrant in America, endeavors to carve out a place for himself in Yugoslavia as a representative of the Yugoslav diaspora. Simultaneously, he seeks to deepen his multicultural and transcultural position in America through an adventurous and exploratory journey toward understanding his roots. It is imperative to consider the fact that Adamič wrote the book with the intention of making it accessible to the widest possible readership. Not only does his return represent an actual return—the motives and circumstances of which are ultimately inscrutable—but it also represents a fictional return—subservient to Adamič's vision of what an innovative narrative of an expatriate's return should entail.

An important dimension of the migrant experience and the experience of return is the concept of "home"—which may or may not remain accessible to the expatriate. In contemporary contexts, home should be understood as a far more complex notion than simply one's place of birth, village, or country of origin. In other words, home is not merely a fixed geographical point imbued with personal meaning. Rather, it should be conceptualized as a multicultural and transcultural phenomenon, embracing both its rootedness and its mobility. Home is simultaneously dynamic and anchored; it resembles an accordion that expands to disperse individuals across distant places yet also contracts to draw them back into intimate, localized spaces (Ralph & Staeheli, 2011, p. 518). This flexible understanding of home

2 Regarding the Yugoslav diaspora in America, see Đikanović, 2016 and Larson, 2020. I use the word diaspora not only as a collective term for emigrants from a particular country but in line with studies of the diaspora—as a distinct anthropological and identity category of existence, encompassing the association of emigrants.

3 Concerning various modes of returning home, see Long & Oxfeld, 2004.

aptly captures how many expatriates perceive and experience their relationship to place. This experience is increasingly prevalent in a globalized and mobile world.

Considering Adamič's contemplation on the concept of identity that is shaped by the migrant experience, particularly the notion of hyphenated identities, where multiple simultaneous connections of a person with various places are emphasized, it underscores the fragmentation of essentialist concepts of identity (Kustatscher et al., 2015, p. 6). This understanding of identity can also be linked to modern concepts such as the notion of hybrid identity introduced by Homi Bhabha (2004) or the concept of intersectional identities.

The interpretation of home in Adamič's *The Native's Return* is intriguing because it transcends a straightforward and essentialist understanding of home and homeland. "I had emigrated to the United States from Carniola, then a tiny Slovene province of Austria, now an even tinier part of a *banovina* in the new Yugoslav state." (Adamic, 1934, p. 3). This statement, which appears in the book's first paragraph, provides a glimpse into the complex concept of home in Adamič. Throughout the book, readers will encounter statements that may appear contradictory. For instance, the assertion, "In the last few years I had become an American writer, writing on American subjects for American readers" (Adamic, 1934, p. 3) attests to his American identity. Additionally, when discussing Americans, he uses the first-person plural (Adamic, 1934, p. 78). However, upon setting foot in Dubrovnik, he exclaims, "My people!" (Adamic, 1934, p. 8), even though his primary connection is with his native Carniola. It is precisely this ambivalence in identity that shapes the multiperspective nature of this work. Jelena Šesnić contends that the macro-narrative structure employed by Adamič in *The Native's Return* reflects the author's navigation between American, Yugoslav, and Yugoslav-American (with individual elements of Slovene, Croatian, Serbian, etc.) perspectives. However, this triangulation of perspectives also brought him some long-term difficulties (Šesnić, 2018, p. 202). It could be argued that beyond his skill in navigating multiple perspectives, Adamič's identity functions on several intersecting levels. He identifies as a Slovene, feels a sense of belonging to the broader Yugoslav community, and simultaneously embraces his American identity. This multifaceted affiliation enables him to critically engage with the problems and shortcomings of each group without partiality. In doing so, Adamič exemplifies a multicultural approach to ethnic, political, and cultural issues, grounded in an ability to mediate between different national and cultural frameworks.

In his discussions about the integration of various ethnic groups into American society, Adamič highlights the necessity for the dominant population to cultivate curiosity to truly appreciate diversity. This particular curiosity is evident in his depictions of customs, people, and places in Yugoslavia:

They asked me about America. Was the *kriza* (the economic crisis) really as bad there as the papers said? Were there really so many people out of work? Was the depression hard on the Slovenian and other Yugoslav immigrants [...] Were the buildings

in America really so tall? Was it true that there was a tree in California so thick that they had bored a tunnel through it for an automobile road? How did the American farmers till their soil? Was it true that most of the work on the land was done by machinery? –that New York had a population of seven million?—that there were ranches in the West bigger than entire Carniola?—that there were underground railroads in New York? (Adamič, 1934, p. 25).

Adamič vividly conveys the curiosity of the Slovenes he encountered, emphasizing their multicultural awareness expressed through questions and reflections that allow them to enrich their own cultural frameworks and, ultimately, improve the conditions of their everyday lives.

Adamič's multicultural awareness is evident in his continuous comparisons of the people, the architecture, and the customs of Yugoslavs to those he became accustomed to during his nineteen years of living in the United States of America. Through the lens of his American experience, Adamič manages to truly comprehend Yugoslavia and to value its people. Being an American enables him to understand Yugoslavia and recognize its strengths and weaknesses (Larson, 2020, p. 171). He perceives his birthplace as significantly smaller than the Empire State or Grand Central Station (Adamič, 1934, p. 21). Adamič expresses delight in Ljubljana bookstores selling books in German, French, Czech, Serbo-Croatian, English, and Italian (Adamič, 1934, p. 29). The Dalmatian climate, reminiscent of the climate he experienced on the southern California coast, also captures his admiration (Adamič, 1934, p. 148). Adamič, as a literary journalist seeking to present his Yugoslav experiences to the American public, always keeps the reader in mind. Therefore, unsurprisingly, he attempts to familiarize his implicit audience with Yugoslavia's geographical and climatic characteristics. In doing so, he simultaneously emphasizes his multicultural awareness and, ultimately, his cosmopolitanism.

When Adamič discusses the geopolitical conditions in the regions inhabited by South Slavs and the rising influence of fascism, particularly along the western border of Yugoslavia, he presents an intriguing perspective that he attributes to the fascists:

They say that eighteen hundred years ago the territory now inhabited by these singing, laughing Slavic barbarians was a valued possession of the noble Roman Caesars; hence it still belongs to Rome, to Fascist Italy. The fact that the Slovenes, then a branch of the Old Slavs, peacefully settled there when no one else occupied that area and the Roman Empire, without any fault on their part, had long been in a state of collapse, does not interest the Fascists. (Adamič, 1934, p. 95)

Through this, he aims to underscore that totalitarian systems such as fascism lack intercultural and multicultural awareness, operating with ideas that are detached from reality. This is also evident in his reference to the forced Italianization of Slovenian personal names (Adamič, 1934, p. 91), an issue to which he paid special

attention when discussing the Americanization of immigrant names with the goal of assimilation.

Similarly, Adamič primarily selectively highlights the places that hold special significance for America or are somehow connected with America. From this, we can infer that this is not solely a book about Yugoslavia but rather an American book about Yugoslavia. For example, in his depiction of Dubrovnik, he emphasizes that the ships and sailors of Dubrovnik were among the most renowned in the world, highlighting their connection to global maritime history:

It is almost certain that Ragusans were on Columbus' ships when he sailed to India and bumped into America. In fact, it is probable that Ragusan ships touched the American continent before Columbus. Certain it is that a number of them reached Mexico, Central and South America, in the few years immediately after Columbus' adventure. Ragusans went around the Horn early in the seventeenth century; they were old-timers in California when the first Yankee got there. (Adamic, 1934, p. 152)

Adamič's hyperbolic and, at the same time, speculative portrayal of the glory and skill of Dubrovnik sailors reflects his attempt to contextualize elements of Yugoslav culture on the global (particularly Western-centric American) geopolitical stage. Simultaneously, he aims to resonate with the American reader and their set of expectations. This approach is evident in his description of the Dubrovnik hinterland and Konavle, in which he asserts that every third person speaks some English because "every other Konavle family has someone in America" (Adamic, 1934, p. 159). Migration and multiculturalism are central themes in Adamič's descriptions. On the one hand, he genuinely seeks to explore authentic Yugoslavia, which leads to an independent existence within its repressive state apparatus. On the other hand, he endeavors to demonstrate that Yugoslavia extends beyond the confines of the ethno-national context and actively participates in the exchange of cross-cultural experiences.

Another stop on Adamič's journey through Yugoslavia is the town of Galičnik, known for sending young men abroad (to Germany, Russia, the United States) to work on construction sites. Adamič highlights their significant contributions to the construction of notable structures such as the palace in Versailles, St. Stephen's Cathedral in Vienna, various hotels in Naples, the Mormon Temple in Utah, and more. He goes on to suggest that Galičnik may even be the most cosmopolitan place in the world, describing it in detail (Adamic, 1934, pp. 117–122). Adamič expresses enthusiasm for multicultural or polyethnic cities and communities characterized by multiculturalism and the migrant experience. These are the aspects he prefers to describe in his work, alongside customs and political conditions in Yugoslavia. In the paragraph below, the narrator demonstrates that despite limited formal education, men from Galičnik were fluent in up to four foreign languages and possessed unique multicultural knowledge and experiences:

Talking with the men [...] I learned of things in Greece, Italy, Turkey, Egypt, Austria, Germany, Spain, and Russia. Several accounts of social, economic, and political conditions in the various countries seemed to me as intelligent as anything one could find in the average European newspaper or magazine.

Since their well-being and prosperity depend to a great extent upon the state of world economy, their interest in the general economic crisis and the possibilities of recovery was intense. (Adamič, 1934, p. 122)

This section unveils Adamič's appreciation for multicultural experiences as something that can serve as a substitute, or at least a counterpart, to formal education. Adamič's role in advancing the concept of democratizing education in the direction of multiculturalism should be contextualized within the progressive ideas of American thinkers in cultural pluralism, particularly John Dewey (cf. Waks, 2007), which eventually becomes a central pedagogical paradigm in certain parts of the world.

As portrayed by Adamič in *The Native's Return*, work serves as the primary and sole bridge for a Yugoslav individual to connect with the world, whether they are a simple worker, Tesla, or Meštrović (Paternu, 1981, p. 96). In other words, both the people of Dubrovnik and Konavle, as well as those from Galičnik, find their multicultural experiences and migrations closely tied to the concept of work. They represent the labor force engaged in the process of labor migration, be it permanent or temporary, which is influenced by the economic conditions in Yugoslavia. Adamič maintains an ambivalent attitude toward this phenomenon. On the one hand, he criticizes the government for keeping people in poverty. On the other hand, he wholeheartedly supports those who leave Yugoslavia to work in other countries. Adamič sees them as seizing the opportunity for a better life and, perhaps equally important, the opportunity to become part of a multicultural community, even though the amount and the difficulty of their work may remain the same or even increase.

In his writings and interactions with immigrants in America, Adamič deliberately selects his conversational partners and the locations he visits and describes. Notably, Sarajevo and Belgrade emerge as the two most prominent cities characterized by multiculturalism. In Sarajevo, a city that uniquely amalgamates various ethno-confessional tendencies, Adamič encounters a young man named Omar Hadži Alić, a Muslim from Sarajevo whose life is shaped by mixed origins, "On his father's side [...] he was of Turkish ancestry, but considered himself a Slav, a Bosnian, a Yugoslav" (Adamič, 1934, p. 183). However, his multiculturalism extends beyond his layered identity and is also manifested in his life journey, as he describes to Adamič:

"You see, my father sent me to an English school on Malta, then to Constantinople, where I also studied English and learned French and German. Lately, running my father's business, I have made some friends among the foreigners, tourists, especially the English and Americans, who come to the store. They send me books and

magazines and, reading these publications, every once in a while I realize that we here in Sarajevo are... well, hanging between sky and earth." (Adamić, 1934, pp. 184–185)

As in the case of the people from Galičnik, Adamić highlights certain qualities in Omar: his multicultural education, fluency in foreign languages, and experience living in a vastly different social and cultural context. Adamić presents such individuals as potential narrative ambassadors, accepting Omar's reflections on the situation in Yugoslavia, especially Sarajevo as its microcosm, as valid and worthy of inclusion in his book.

The section dedicated to Belgrade is the part of *The Native's Return* that most explicitly deals with Serbian cultural and political circumstances. At the beginning, Adamić presents his typology of two types of Serbs. Those belonging to the first type come from rural areas; more precisely, they are the poor Šumadija peasants, who value freedom and independence, democracy and civility, are patriots, proud of their nationality, progressive, honest and pure Serbs who "[e]xcept here and there, (...) never mixed with Turks, Rumanians, Bulgars, gypsies, or Jews" (Adamić, 1934, p. 237). The second type is the "businessmen" connected to the Belgrade "moguls"—most often a mixture of all the mentioned peoples and Serbs. This characteristic intensifies their opportunistic and aggressive traits, making them very dangerous and unscrupulous (Adamić, 1934, p. 237). Adamić's association of negative traits with a multiethnic origin raises questions about essentialism and value hierarchization, potentially conflicting with the ideals of the multicultural society he advocated.

Next, Adamić directs his narrative attention to Belgrade in the early 1940s, exploring aspects such as politics, urban planning, architecture, economy, tourism, and culture. Therefore, we can understand Adamić's text as a cultural text that contributes to creating a narrative about the city as a spatial-cultural construct (see Rohleder & Kindermann, 2020). His representation of Belgrade can be scrutinized within the context of transcultural exchange and the construction of American stereotypes about Belgrade during that historical period, serving as a crucial cultural function of the text. Adamić skillfully manipulates the expectations of the American reader, framing Belgrade within the context of American cities. He draws comparisons between Belgrade and Chicago from three decades prior. He delves into a psychological comparison between the people of Belgrade and those of Los Angeles (Adamić, 1934, pp. 242–243). Additionally, he contextualizes Belgrade within the broader European framework, strategically placing it in the geopolitical milieu of the early 20th century.

Adamić's portrayal of Belgrade, labeled as a "boom town" in the title of his chapter, is marked by significant migrations when individuals immigrate to the city in great numbers. He notes, "Many peasants, venders, migratory laborers, and drifters who come in from Shumadia, from central Serbia, Macedonia, Bosnia, and the Albanian mountains still wear their local national costumes" (Adamić, 1934, p. 241). In this

context, Adamič underscores the significance of labor migration from smaller towns and less developed areas of Yugoslavia, contributing to the richness and vibrancy of the emerging multicultural society in Belgrade. However, he also highlights that “people from Croatia, Dalmatia, Slovenia, Bosnia, and Macedonia commenced to pour into their new capital as fast as railroads could bring them” (Adamic, 1934, p. 243). This portrayal positions Belgrade not only as a destination for labor migration of the impoverished population but as the capital for all its citizens, solidifying its status as a central multiethnic hub in the Kingdom of Yugoslavia.

Referencing the long-standing perception of Belgrade as a liminal zone between East and West (cf. Lazić, 2003), Adamič concludes that two decades ago, distinguishing the cultural sphere of Belgrade was challenging. However, he observes that it has become evident that the West is gradually superseding the East (Adamic, 1934, p. 247). Adamič discerns this transformation in various aspects of daily life, noting the decline in the Muslim population and the reduced remnants of the old Turkish quarter. At the same time, the Belgrade bazaar retains a Turkish character, serving as the sole place in Belgrade where an oriental atmosphere prevails (Adamic, 1934, pp. 239–241). Similar to his approach in describing Ljubljana, Adamič aims to highlight the multicultural elements of the city, particularly by observing people and storefronts.

One or two confectionery stores on Prince Mikhailo's Avenue still sell Oriental sweetmeats. But the display windows of other shops on the street, which is the center of Belgrade's shopping district, are totally Western. There are the latest styles in ladies' dresses and gowns, lingerie and stockings, hats, gloves, and footwear; gentlemen haberdashery stores, with London neckties, hand-tailored shirts, tuxedos, dinner jackets; flower shops and American drug stores; bookstores selling reading-matter in Serbo- Croat, Slovene, French, German, and English; agencies of most American and European makes of automobiles, tires, typewriters, radios, frigidaires, and sewing-machines. (Adamic, 1934, p. 247)

Similar to what he observes in Ljubljana, Adamič underscores the availability of foreign books in Belgrade as a clear indicator of the multicultural atmosphere in the city. Additionally, he notes elements of everyday life, such as clothing, shoes, and household appliances, that reflect the city's progressiveness in the Western sense.

In contrast to the evident foreign influences contributing to the modernization of Belgrade and its placement on the geopolitical map of Europe, life in small towns is characterized by its apparent insignificance and enduring nature. Adamič observes, “No matter what happened in America, in Russia, and in the rest of Europe, nine chances out of ten the agriculturists in the village of Blato, as in Brankovo and other villages in Carniola, would stay where they were—for some time to come, at any rate.” (Adamic, 1934, p. 84) Adamič emphasizes such paradoxes in his book, highlighting that while some economic and cultural centers manage to develop a

multicultural environment, the majority of the rural population remains unaffected and resistant to industrial and technological progress, as well as the realization of the ideal of multiculturalism. Perhaps this is why the narrator dedicates significant space to the small Macedonian village of Galičnik, as it appears that its inhabitants transcend the mentioned paradox, with its inhabitants, despite being members of the working class that experiences multiculturalism.

Adamič's endeavor to promote multiculturalism is frequently intertwined with his concern for the worker, the farmer, and the ordinary person, as illustrated in the following passage:

For centuries, as the Kosovo epic so tragically records, the Yugoslavs have had within them two powerful urges—one toward union, the other toward discord. The first, despite their clannishness, has been strongest in the common people, who are all God's *siroté*, poor people, and as such have a great deal in common; while the second has usually come from their leaders and would-be leaders seeking momentary political and economic advantages for themselves. (Adamic, 1934, p. 231)

In Adamič's perspective, the unity and togetherness of the Yugoslav peoples are inherent. He contends, however, that the elites and ruling classes hinder such unity as it does not align with their economic interests. In essence, the elites do not promote or facilitate the cultivation of a robust multicultural consciousness among Yugoslavs, who, if united, could progress more rapidly and efficiently, forming a shared Yugoslav identity. This aspiration remained unrealized during the various joint-state formations in Yugoslavia.

CONCLUSION

Adamič's perspective on cultural pluralism and multiculturalism is intricate and primarily shaped by his firsthand experience residing in the United States of America, a polyethnic state built upon immigrant communities. Recognizing that his multiculturalism is rooted in personal encounters and direct interactions with fellow immigrants is crucial. His writings on cultural pluralism stem from a research approach reminiscent of immersion journalism and reflect experiences closely aligned with real-life situations (Flis, 2020). Despite being a renowned writer and lecturer, Adamič did not approach the migrant issue from a position of superiority. At one point, he himself was merely one among the multitude of immigrants arriving at Ellis Island.

It is important to note that Adamič's perspective still reflects elements of cultural pluralism that categorize some peoples as primitive and others as civilized (see Adamic, 1934, pp. 70, 108, 125, 215). This introduces an axiological component into the study and understanding of cultures that diverge from more contemporary

multiculturalism. It is crucial to note that Adamič's multicultural stance was in the process of formation in 1933 when he wrote *The Native's Return* and that his more advanced works were published after his return from Yugoslavia. Exploring the development of his multicultural consciousness throughout his career becomes intriguing, paving the way for understanding Louis Adamič as a precursor to multiculturalism as a sociopolitical worldview.

Because of Adamič's experience in a multiethnic state, an insight into his reflections and writing about the multinational issue of Yugoslavia is valuable as it brings a new and fresh perspective on cultural pluralism in interwar Yugoslavia. Adamič was particularly interested in multicultural environments and individuals, as well as in customs that not only provided entertainment for American readers but also prompted intellectual reflection. In *The Native's Return*, like in his other works and articles, Adamič studies multicultural aspects of society through the lens of individual human destinies and elements of everyday life because that seems to him to be the most striking. In other words, by choosing individuals and places that are in some way marked by multiculturalism, Adamič tries to convey stories about them to the American reader so that the latter would get an insight into the situation in a multinational state. However, we should be aware that this is only one possible view of it, which is largely constructed and subordinated to the particular ideological intentions of the storyteller. Therefore, it is important to point out that Adamič is a sharp and meticulous observer who makes thoughtful political forecasts (which proved to be accurate); however, sometimes he is just a confused newcomer who does not fully understand domestic social codes (Šesnić, 2018, p. 201). The fact that Adamič cannot understand in detail and fully encompass certain social aspects of life in Yugoslavia is conditioned by his ambivalent position, which becomes obvious if one considers his migrant background and the concept of return. *The Native's Return* is, therefore, not a return to the native Carniola as a part of Austria-Hungary, but rather a return to the Kingdom of Yugoslavia, which was established on a completely different foundation and which Adamič needed to discover and explore in his own unique way. Although the events he describes and the social context he refers to are strictly defined, his work provides highly significant and far-sighted insights into multicultural issues in the Yugoslav regions. His work was published almost a century ago; nevertheless, an incredible modernity shines through it, making it a read that is relevant even in the 21st century.

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POVZETEK

REPREZENTACIJE IN KONFIGURACIJE MULTIKULTURALIZMA V DELU *VRNITEV V RODNI KRAJ* LOUISA ADAMIČA

Darko Ilin

Avtor v prispevku obravnava multikulturne perspektive hibridnega dela *Vrnitev v rodni kraj* (1934), ki zajema različne zvrsti, od potopisa do političnega in etnografskega komentarja. Louis Adamič je bil slovensko-ameriški pisatelj in priseljenec, ki je živel in ustvarjal v prvi polovici 20. stoletja. Na podlagi svoje priseljenške izkušnje je prevpraševal prevladujoči koncept talilnega lonca in se zavzemal za raznoliko in sodelujočo ameriško družbo. V svojih edinstvenih stališčih, na katera so vplivale komunistične ideje, se je zavzemal za globoko demokratično kulturo, v kateri bi lahko etnične skupnosti sobivale in hkrati ohranjale svoje tradicije. Adamičev multikulturalizem se je razvil in presegel sodobno miselnost, kar se kaže v njegovem zavračanju liberalne kulture strpnosti v prid demokratični kulturi sprejemanja.

Avtor obravnava temeljno delo Louisa Adamiča *The Native's Return* (*Vrnitev v rodni kraj*), v katerem ta preučuje večplastne razsežnosti večkulturnosti, identitete in migracij v kontekstu svojih izkušenj v polietničnih Združenih državah Amerike in multinacionalni Kraljevini Jugoslaviji. Na podlagi teoretičnega vpogleda v multikulturalizem kontekstualizira Adamiča v okviru študij kulturnega pluralizma in multikulturalizma ter tako postavi temelje za nadaljnjo analizo. Razišče Adamičevo pripovedno strategijo, zajeto v konceptu »vrnitve«, ki poudarja dinamično in transkulturno naravo doma in identitete, ter pojasnjuje Adamičevo ukvarjanje s sodobnimi pojmi identitete, kot so transnacionalne identitete in intersekcionalnost, pri čemer izpodbija esencialistične perspektive.

Poleg tega analizo razširi na Adamičevo večkulturno zavest, ko ta primerja jugoslovanske in ameriške običaje ter poudarja vlogo radovednosti pri spodbujanju razumevanja različnosti, pri čemer njegov prikaz Beograda služi kot osrednja točka za raziskovanje transkulturne izmenjave in oblikovanja stereotipov ter prispeva k širši kulturni pripovedi. Tipologija Srbov v Adamičevi pripovedi sproža kritična vprašanja o esencializmu in ponuja vpogled v kompleksnost doseganja večkulturnosti.

Avtor v članku izpostavlja Adamičevo zavezanost navadnemu delavcu in kritike nesoglasij elit ter osvetljuje njegovo vizijo združene in večkulturne Jugoslavije. Z raziskovanjem manjših mest in makedonske vasi Galičnik dodatno razkriva paradokse multikulturalizma v različnih regijah. Adamiča pozicionira kot predhodnika sodobnih razprav o večkulturnosti, migracijah in identiteti ter ponuja niansirane perspektive, ki bogatijo naše razumevanje teh kompleksnih družbeno-političnih pokrajin.

»UGOTOVIŠ, KAJ VSE SE DA«: EKONOMSKE PRILOŽNOSTI IN STRATEGIJE PRISELJENIH DRŽAVLJANOV SLOVENIJE V LJUDSKI REPUBLIKI KITAJSKI

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IZVLEČEK

»Ugotoviš, kaj vse se da«: Ekonomske priložnosti in strategije priseljenih državljanov Slovenije v Ljudski republiki Kitajski

Avtorja v prispevku predstavita slovenske državljane na Kitajskem v 21. stoletju. Njihovo maloštevilnost in nacionalno nerazpoznavnost obravnavata kot posebnost v razvijajočih se raziskavah priseljenstva na Kitajskem. Priseljence proučujeta skozi kontrastne vpetosti v ekonomijo in zanje predlagata analitični kategoriji »menadžerji« in »podjetniki«. S prvimi povežeta lokalno umeščanje na podlagi proizvodnih obratov slovenskih podjetij na Kitajskem in težnjo po nacionalnem povezovanju, z drugimi pa iskanje nišnih priložnosti na ogromnem kitajskem trgu. Avtorja naslovita tudi časovnost tega migracijskega procesa in analizirata specifično prepletanje makroekonomskih dejavnikov in osebnih odločitev v okviru tega procesa.

KLJUČNE BESEDE: priseljevanje na Kitajsko, izseljenci, ekspati, skupinjenje, podjetništvo, delovne migracije

ABSTRACT

“You Find Out What’s Possible”: Economic Opportunities and Strategies of Slovenian Citizens Living in the People’s Republic of China

The article focuses on the Slovenian citizens in China in the 21st century. The authors consider their small numbers and national non-recognition as a distinctiveness in the fast-developing field of research on immigration in China. They discuss the immigration of Slovenian citizens through contrasting engagements with the Chinese economy and propose the analytical categories of “managers” and “entrepreneurs.” They link the former to the local emplacement based on the Slovenian companies’ production units in China and the drive for national groupness, and the latter to the search for niche opportunities in the huge Chinese market. The authors also address this temporality of the migration process and detail the interplay between macroeconomic factors and the individual decisions of its protagonists.

KEYWORDS: immigration in China, emigrants, expats, groupness, entrepreneurship, labor migration

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UVOD

»[K]o smo prišli [na Kitajsko], [vidiš] kako je to iz ene majhne države priti tja, kako [je] potem glede biznisa, kako se moraš dokazovati, mogoče dosti bolj kot nekdo, ki je iz Amerike ali pa Nemčije.«

Pričujoči članek je posvečen priseljenkam in priseljencem¹ na Kitajskem ter njihovim izkušnjam, ki jih ponazarja zgornja izjava enega izmed njih: prišli so iz Evrope, z ekonomskim ciljem, v neznano in slabo prepoznavni. Od pridružitve Ljudske republike Kitajske (v nadaljevanju »Kitajska« ali »LR Kitajska«) Svetovni trgovinski organizaciji (STO) leta 2001 so raziskovalci migracij na Kitajskem postajali vse bolj pozorni na priseljenke iz Evrope (Camenisch & Sutter, 2020). Migracije Evropejcev so bile v pomembni meri povezane z ekonomijo: razglasitvijo politike »odprtih vrat« za tuje investicije leta 1978, pridružitvijo STO, uvajanjem in umikanjem politik ekonomskega protekcionizma v zadnjem desetletju, pandemijo bolezni covid-19. Desetletje po priključitvi STO je zaznamoval visok priliv tujih investicij in z njimi priseljevanje (Farrer, 2019, str. 5), zadnje desetletje in predvsem dobo covida-19 pa tudi zapuščanje Kitajske (Kefala & Lan, 2022). Ob splošnih trendih so bile mednarodne migracije ujete v kompleksna družinska in druga razmerja. O tem govori pričujoča raziskava o slovenskih državljankeh in državljanih na Kitajskem.²

V raziskavah o sodobnem priseljevanju na Kitajsko igra nacionalnost (poleg barve kože) vidno vlogo, pri čemer pričujoča raziskava izstopa z izbiro državljanov Slovenije kot raziskovalnega fokusa. Nacionalnosti »zahodnih« ali »belih« priseljen-
ceev so namreč v kitajski družbi različno zaznavane, kot tudi izražane s težo različnih kulturnih kapitalov priseljenecv različnih nacionalnih pripadnosti. Britanci in Francozi v Šanghaju denimo poustvarjajo imaginarij kolonialne preteklosti v tem mestu (Farrer, 2019), Američani reprezentirajo podjetništvo in uspeh oz. »kitajske sanje« (Kefala & Lan, 2022), Nemci pa (glede na pripovedi sogovornikov) prezenco s korporativno kulturo podjetja, za katerega delajo. Švicarji so po drugi strani številčno slabše vidni, ne pa tudi simbolno, saj ima Švica na Kitajskem status blagovne znamke, starejši Kitajci pa se spominjajo, da je prav ta država med prvimi priznala LR Kitajsko (Camenisch, 2022, str. 134). V duhu spominov imajo starejši tudi pozitivno percepcijo Jugoslavije: večkrat sva ob naključnih srečanjih na ulicah Pekinga, Suzhoua in Šanghaja izkusila, da Jugoslavija tam živi v melodijah iz filmov, kot je Valter brani Sarajevo. Slovenija pa je za razliko od naštetih nerazpoznavna: nanjo ni spominov iz preteklosti in z njo niso povezani kulturni kapitali v obliki blagovnih znamk in kulturnih imaginarijev. Poleg tega je slovenskih državljanov tam le peščica. Zato meniva, da jih v primerjavi z ostalimi evropskimi priseljenci na Kitajskem pomembno

1 V nadaljevanju besedila so izrazi, zapisani v slovnični obliki moškega spola, uporabljeni kot nevtralni in veljajo enakovredno za vse spole.

2 V članku obravnavava vse slovenske državljanke z daljšo izkušnjo prebivanja na Kitajski, ne glede na njihovo etnično izrekanje, zato izraza Slovenci ne uporabljava.

opredeljuje prav ta nerazpoznavnost, ki se na različne načine vpisuje v njihove migracijske strategije.

Druga izrazita poteza raziskav »zahodnjakov« na Kitajskem je težnja po njihovem klasificiranju (gl. Leonard & Lehmann, 2019, str. 8–9; Pieke et al., 2019). Tam so (domnevno) s prav določenimi motivi, na osnovi katerih jih raziskovalci »predalčkajo«. Na primer, »Šanghajlenderji« so iskalci reminiscenc na svetovljane kolonialne dobe (Farrer, 2019), »mladi podjetniki« so iskalci priložnosti za hiter karierni uspeh (Farrer, 2019; Kefala & Lan, 2022), bolj etablirani »podjetniki« zasledujejo dolgoročneje cilje (Camenisch, 2022), »poslovodje«, »menedžerji«, »CEO-ji« večjih podjetij pa so tam spet v drugačni vlogi (Farrer, 2019). Vsaka takšna vloga – oz. s strani raziskovalcev pripoznana vloga – vključuje lastne načine vedanja, komuniciranja, druženja, dela itn., predvsem pa izgrajevanja socialnega okolja. Raziskovalcem je takšno klasificiranje služilo prav za orisovanje socialnih okolij in prepoznavanje stikov med njimi (gl. Farrer, 2019). Klasificiranje torej ni namenjeno samo sebi, ampak ima hevristično vlogo izrisovanja priseljenjskih svetov, zato sva ga uporabila tudi sama. Pri tem se zavedava pasti »predalčkanja«. Tako je problematična že oznaka »priseljenec«, saj nič ne pove o razlogih migracije. Podobno je z oznako *ekspat* (slovenjeno »začasno izseljeni državljan«), kot so se opredeljevali nekateri sogovorniki. Slednjo bi lahko uporabili za vse naše sogovornike, saj so načrtno ohranjali državljanstvo, vezi z matično državo in idejo o vrnitvi, vendar je kljub temu pri posameznikih bolj izstopala svetovljanska odprtost, v smislu, da vrnitve v Slovenijo niso videli kot nujno, saj karijerne priložnosti prepoznavajo tudi kje drugje. Ob tem, da so nekatere kategorije (pre?)splošne, je z bolj ozkimi kategorijami, kot sva jih po literaturi nekaj naštela zgoraj, težava to, da se prekrivajo.

Kljub navedenim težavam s klasificiranjem bova v nadaljevanju opredelila nekatere (izbrane) razlike med državljani Slovenije na Kitajskem, in sicer predvsem razlike, ki sva jih opazila v povezavi z ekonomskimi dejavnostmi (tako proizvodnimi kot potrošniškimi) in z njimi povezanimi družbenimi razmerji. Glede na različno vpetost v kitajsko družbo in glede na različno težnjo po tvorjenju nacionalnih vezi – pri slednjem opazava vpliv gospodarske dejavnosti in (ne)družinskega življenja akterjev – izpostavlja tri kategorije, pri čemer se bova prednostno osredinila na prvi dve: (1) »menedžerji« večjih podjetij z intimnimi in poslovnimi partnerji; (2) »podjetniki« oz. iskalci priložnosti; (3) »sinologi«. Meniva, da bova s takšno klasifikacijo lahko prikazala nekatere dinamike med slovenskimi državljani na Kitajskem, njihovo različno vpetost v lokalna okolja in njihovo ostajanje oziroma odhajanje skozi čas.

Pričujoči članek lahko pogojno umestimo v tradicijo raziskav slovenskega izseljenstva (Čebulj Sajko, 2000; Žigon, 2003; Mikola, 2005; Repič, 2006; Toplak, 2008; Lukšič Hacin & Mlekuž, 2009; Durnik, 2017; Molek, 2019). V mnogih raziskavah o izseljencih je bila pomembna tema »skupnost«: kako Slovenci v določeni državi ohranjajo nacionalno identiteto v okvirih skupnosti, ki je formalizirana v društvi in/ali jo vzdržujejo skozi rituale. Mnoge raziskave so potekale med »tradicionalnimi migranti« v Argentini, Avstraliji, ZDA idr., zato so upoštevale zgodovinski obstoj

migrantskih skupnosti. Pričujoča raziskava pa ni izhajala iz predpostavke in predstave, da obstaja nekakšna skupnost Slovencev na Kitajskem, ampak je za osnovni okvir izbrala hitro rastoče polje raziskav priseljenstva na Kitajskem (glej spodaj). Šele terensko delo je razkrilo, da so nekateri akterji aktivno gojili nacionalne vezi, drugi so bili na obrobju tega prizadevanja, tretji do njega indiferentni. Zgoraj predlagana klasifikacija odraža tudi te tendence.

V naslednjem razdelku bova predstavila raziskavo, sledil bo pregled raziskovanja migracij na Kitajskem, nato pa bova utemeljila predstavljeno klasifikacijo. Sledil bo razdelek o »slovenskih« tovarnah v okolici Suzhoua in težnjah nosilcev te dejavnosti po nacionalnem »skupinjenju«. ³ Nato bova predstavila izbrane primere »podjetnikov«, da bi prikazala različne ekonomske, družbene in osebne pomene, ki jih ti pripisujejo Kitajski. Zaključila bova z diskusijo o kontrastnih odnosih identificiranih kategorij priseljencev do lastne nerazpoznavnosti na Kitajskem, lokalizacije na Kitajskem in v Sloveniji, nacionalnega skupinjenja ter dinamike priseljevanja in zapuščanja Kitajske.

RAZISKAVA

V okviru terenske raziskave na Kitajskem in v Sloveniji, ki je potekala leta 2024, je bila preučevana izkušnja vsakdanjega življenja in počutja (angl. *well-being*) priseljenih na Kitajsko. ⁴ Raziskava temelji na narativnih intervjujih s spremljajočim opazovanjem z udeležbo. Pri narativnem intervjuju sogovornice ali sogovorniki ustvarjajo lastno pripoved na temo, ki jo predlagajo raziskovalci, s čimer razkrivajo lastne vrednote in razumevanja sveta ter izkušnjam in življenjskim odločitvam pripisujejo osebne pomene. Pogovori so se začeli s sprožilci razmišljanja o izbranih temah, npr.: »Povejte nam prosim, kako ste prišli na Kitajsko« ali »Kako izgleda vaš vsakdan na Kitajskem?«. Za specifične podatke, npr. o počutju, smo v zadnjem delu postavljali usmerjena vprašanja.

Izbira metode je bila pogojena z načinom življenja priseljenih, ki so zaradi dela, usklajevanja med poklicnim in družinskim življenjem ter stalnega načrtovanja svojih dejavnosti imeli omejen čas, povrhu pa živijo razkropljeni po različnih mestih, zato smo se za srečanja natančno dogovarjali vnaprej. Na nujnost upravljanja s časom so nas opozarjali tudi sogovorniki, s katerimi smo pogosto govorili kar na delovnem mestu, v gostinskih lokalih na poti med eno in drugo obveznostjo ali celo v

3 Sodobno družboslovje je kritično do esencijalizacije etničnih, nacionalnih in podobnih skupin, zato za prakse in procese tvorjenja nacionalnih vezi in skupin uporablja besedo »skupinjenje« (angl. *groupness*; Brubaker, 2002).

4 Raziskava je del mednarodnega projekta »PopMed-SusDev: Populacijska medicina in trajnostni razvoj«. Skupina raziskovalcev z ZRC SAZU, ki so jo sestavljali Maja Gostič, Marijanca Ajša Vižintin, Nataša Gregorič Bon, Miha Kozorog in vodja Martina Bofulin, je izvedla enomesečno gostovanje na kitajski univerzi Xian Jiatong Liverpool v Suzhouu.

avtomobilu ob razvozu otrok na popoldanske aktivnosti. Sogovornikom smo se želeli kar najbolj prilagoditi, s čimer pa smo obenem dobili dodaten vpogled v njihova življenja, ki je presegal zgolj narativni vidik. Kljub časovnim stiskam smo s sogovorniki pogosto preživeli dobršen del dneva in spoznali njihove družinske člane.

Ker raziskava ni zasnovana kot dolgotrajno terensko opazovanje, ki bi nam omogočilo poglobljeno razumevanje tvorjenja raznolikih identitet in razlik med priseljenci, smo se osredinili na slovenske državljane. Ta maloštevilna skupina kaže nekatere skupne poteze, hkrati pa so življenjske poti in izkušnje Kitajske v njej zelo različne. Glede na podatke Ministrstva za notranje zadeve je bilo ob koncu leta 2023 na Kitajskem 89 slovenskih državljanov (Urad Vlade, 2024). Glede na naše pogovore je skupina pred pandemijo bolezni covid-19 štela vsaj 150 oseb, po podatkih Ministrstva za zunanje zadeve, ki so krožili v medijih, pa okoli 300 oseb (A.S./STA, 2020). Podatki Statističnega urada Republike Slovenije o izselitvah slovenskih državljanov na Kitajsko pa kažejo od leta 2005 naprej več kot 10 izselitev letno, razen leta 2008 (začetek svetovne ekonomske krize) ter 2020 in 2022 (pandemija). Posebej med letoma 2013 in 2019 se je na Kitajsko izselilo okoli 20 oseb letno, največ leta 2017, ko se jih je izselilo skoraj 30 (SURS, 2024).

Sogovornike za raziskavo smo pridobili z metodo snežne kepe in s pomočjo objave poziva za sodelovanje na spletnem komunikacijskem kanalu »Sloenci na Kitajskem« kitajske platforme Weixin. Ta povezuje večino slovensko govorečih oseb, ki živijo ali so živeli na Kitajskem. Med februarjem in septembrom 2024 smo izvedli 23 intervjujev z 21 državljani Slovenije in tremi državljani držav nekdanje Jugoslavije,⁵ od tega devetimi osebami ženskega in petnajstimi osebami moškega spola. Večino intervjujev smo izvedli na Kitajskem, s »povratniki« pa smo jih izvedli v Sloveniji (en intervju je potekal virtualno). Vsi sogovorniki so na Kitajskem v zadnjih desetih letih preživeli vsaj dve leti, večina pa precej dlje. 15 sogovornikov je v času raziskave prebivalo na Kitajskem. S slovenskimi državljani so intervjuji potekali v slovenskem jeziku, z ostalimi pa v hrvaškem ali angleškem. Za pogovore z državljani Hrvaške in Srbije smo se odločili zato, da bi dobili boljši vpogled v to, kaj je specifičnega v izkušnjah državljanov Slovenije. Pogovori so povprečno trajali tri ure, najdaljši pa več kot štiri ure. Vse pogovore (razen enega, pri katerem sogovornik tega ni želel) smo snemali in jih transkribirali (pri neposnetem smo naredili zapiske), vsi so potekali v skladu z evropskimi etičnimi smernicami raziskovalne integritete (ALLEA, 2023).⁶ V pričujočem besedilu sva sogovornike anonimizirala, po potrebi pa sva spremenila tudi njihove osebne identifikatorje. Poleg intervjujev smo v analizo vključili tudi dostopna gradiva, ki so nam jih posredovali sogovorniki.

5 Med načrti za raziskavo je bila tudi primerjava državljanov držav nekdanje Jugoslavije na Kitajskem, vendar nismo uspeli pridobiti dovolj podatkov za sistematično primerjavo.

6 Prepisi intervjujev so shranjeni v arhivu Inštituta za slovensko izseljenstvo in migracije ZRC SAZU in so dostopni raziskovalcem, ki izkažejo legitimni interes.

OBLJUBLJENA DEŽELA? HITER RAZVOJ PRISELJEVANJA NA KITAJSKO

LR Kitajska je vse od svojega nastanka skrbno nadzorovala populacijska gibanja, vključno s priselitvami. V petdesetih in šestdesetih letih 20. stoletja so bili na Kitajskem dobrodošli le strokovnjaki zavezniških sil (predvsem iz Sovjetske zveze) ter posamezni delegati in študenti »prijateljskih« držav (Brady, 2003). S kulturno revolucijo se je še ta maloštevilna populacija izselila in država se je za tujce skoraj popolnoma zaprla (Pieke, 2012). Po smrti Mao Cetunga in korenitih ekonomskih reformah leta 1978 pa je število priseljencev začelo hitro naraščati. Katalizator tega gibanja so bile novo ustanovljene »posebne ekonomske cone« (povečini gre za dele velikih priobalnih mest jugovzhodne Kitajske), v katerih je kitajska oblast vpeljala posebna pravila, ki so pritegnila tuje vlagatelje, s čimer je raslo priseljevanje predstavnikov tujih podjetij. Specifično prostorsko razporeditev priseljencev na Kitajskem je še danes mogoče povezati s temi območji, ki so koncentrirala priseljence (Leonard & Lehmann, 2019).

Na voljo je le malo podatkov o številu priseljencev na Kitajskem. Država je podatke o »tujcih« v census vključila šele leta 2010, pred tem pa so različne podatke zbirale posamezne kitajske agencije (prim. Pieke, 2012). Glede na zadnji census (2020) na Kitajskem živi 845.697 tujih državljanov, kar je skoraj 250.000 več kot leta 2010 (Gov.cn, 2021). Podatki Organizacije združenih narodov (OZN) za leto 2020 navajajo dober milijon priseljencev s tujim državljanstvom (United Nations, 2020), odražajo pa tudi jasen trend povečevanja njihovega števila do leta 2020 (za kasnejše obdobje podatki (še) niso znani). Za drugo najštevilčnejšo državo sveta se zdi milijon skoraj zanemarljiva številka, saj predstavlja le 0,07 odstotka prebivalstva (po podatkih OZN), kar je neprimerljivo z večino razvitih držav. Toda podatki kitajskega censusa so verjetno podcenjeni (Pieke, 2012, str. 45); tudi zato, ker nekateri tuji državljani tam prebivajo na podlagi kratkotrajnih turističnih viz. Navzlic majhnemu relativnemu deležu priseljenih v prebivalstvu Kitajske je specifična teža priseljencev zaradi naraščajočega trenda priseljevanja in skoncentriranosti priseljencev v posameznih urbanih središčih večja, kot bi bilo moč sklepati zgolj iz njihovega števila (Pieke, 2012).

Večina priseljenih prihaja iz sosednjih držav. Manjšina so t. i. »zahodnjaki«, ki prihajajo iz Evrope in severne Amerike, ki pa jih poleg državljanstva v kitajskih imaginarijih pomembno določa fenotip. Večina jih živi v metropolah Kitajske, v t. i. »mestih prvega reda«, kot sta Peking in Šanghaj, pa tudi v manjših, hitro razvijajočih se mestih vzhoda Kitajske (Xiamen, Tianjin, Suzhou, Shenzhen). Omejeni so torej na peščico mest, kjer je njihova prisotnost zaznana tako v preživetvenih in drugih praksah kot v ustvarjanju urbanega utripa, npr. posebnih storitvah in prostorih za priseljence (Farrer, 2019; Leonard & Lehmann, 2019, str. 2).

Kitajska je k zakonodaji na področju priseljevanja pristopila počasi in previdno. Leta 2012 je sprejela Zakon o izstopu in vstopu (*Zhonghua renmin gongheguo chujing rujing guanli fa*), s katerim poskuša sistematično urejati prebivanje, pravice in nadzor nad priseljenimi (Leonard & Lehmann, 2019). Leta 2016 se je Kitajska pridružila

Mednarodni organizaciji za migracije (IOM) in leta 2018 ustanovila posebno agencijo, zadolženo za vprašanja priseljavanja (*Guojia Yimin Guanli*/National Immigration Agency) (Speelman, 2020). Zakon uvaja tudi sistem, ki spominja na t. i. preferenčno pridobitev dovoljenj za prebivanje glede na značilnosti priseljence, ki ga imajo nekatere druge priseljenke države (npr. Kanada). Tako obstajajo tri kategorije priseljencev: (A) talenti, ki jih je treba pritegniti; (B) kvalificirani in usposobljeni delavci, ki jih je treba zadržati; (C) nekvalificirani delavci, ki jih je treba omejiti (Liu & Ahl, 2018). Te kategorije zakonsko niso podrobneje določene, kar lokalnim oblastem omogoča različne interpretacije. V pomembni meri naj bi na dovoljenja in njihovo trajanje vplivala velikost tujega podjetja, panoga, obseg vlaganj in pozicija na trgu ter vloga iskalca dovoljenja v podjetju (China Briefing, 2014). Država tudi jasno definira vloge imetnikov dovoljenj: imetniki delovnega dovoljenja naj delajo, imetniki družinskega dovoljenja naj bodo doma, imetniki študijskega dovoljenja naj študirajo (Pieke et al., 2019, str. 7). To za številne pomeni težavo, zaradi česar se odločajo za delo na črno. Problem predstavljajo tudi omejene možnosti za dolgotrajnejše bivanje na Kitajskem (t. i. dovoljenje za stalno prebivanje) in nezmožnost bivanja na Kitajskem za upokojene priseljence, ki so na Kitajskem preživeli večji del življenja (prim. Farrer, 2019). Tovrstni pristop vodi v stanje »stalne nestalnosti« (angl. *permanent impermanence*; Lehmann, 2014), ki vpliva na to, kako priseljeni oblikujejo srednjeročne in dolgoročne načrte.

Raziskave o priseljivanju na Kitajskem so zaenkrat zelo omejene, saj je Kitajska veljala za državo izseljevanja (prim. Bofulin, 2022). Na tem hitro razvijajočem polju pa so raziskovalci v zadnjem desetletju objavili več pomembnih etnografskih študij: Angela Lehmann (2014) o priseljenicah v Xiamenu, Gordon Mathews in sodelavci (Mathews et al., 2017) v Guangzhou, James Farrer (2019) o preteklem in sodobnem priseljivanju v Šanghaj, Kumiko Kawashima (2019) pa o japonskih IT strokovnjakih v Dalianu. V smislu poklicnih skupin je največ pozornosti namenjene učiteljem angleščine, saj je ta nekdanji prestižni poklic postajal vse bolj prekaren (Leonard, 2019; Litman, 2021; 2022; Lan, 2022a). Pozornost vzbujajo tudi »ekspati« kot predstavniki tujih podjetij in njihove družine (Ma, 2019). Nastajajo tudi raziskave o pomenu zaznavanja rasnih razlik na Kitajskem, tako »belskosti« kot »črnskosti« (Leonard, 2008; Camenisch, 2022; Lan, 2022a; 2022b; Lan et al., 2022; Ma, 2022; Sier, 2022). Študije spola se posvečajo presečnosti z etnično in nacionalno pripadnostjo (Ma, 2022), kot tudi romantičnim zvezam (Haugen, 2022; Sier, 2022) in porokam (Barabantseva, 2019). Prav tako so šele v povojih raziskave o odnosu kitajske države do priseljencev (Haugen, 2018; Leonard & Lehmann, 2019; Speelman, 2020; Haugen & Speelman, 2022). Trenutno tako največ uvida v priseljivanje na Kitajsko prinašajo prav etnografske raziskave, ki se jim pridružuje tudi najina raziskava.

V ISKANJU NACIONALNE IN PRAGMATIČNE SKUPNOSTI: MENEDŽERJI, MALI (MLADI) PODJETNIKI IN SINOLOGI

Na začetku 21. stoletja je bila na Kitajskem le peščica slovenskih državljanov. Večina je Kitajsko slabo poznala in je imela omejene družbene mreže. Sogovornika, ki sta v mestu Suzhou postavila proizvodnjo za slovensko podjetje, sta večkrat obiskala metropolitanski Šanghaj, saj je bil Suzhou majhen (danes osem milijonsko mesto je takrat štelo dva milijona prebivalcev; Suzhou, Jiangsu, n.d.). Tam sta iskala družbo sodržavljanov: »[Med sabo] sva govorila slovensko, [...] ampak to ni to, rabiš še malo več, zato sva rada šla v Šanghaj, kjer sva še kakšnega dobila [...]. Kmalu ugotoviš, da je tudi s partnerjem mogoče kar omejen besednjak.« Srečanja s sodržavljanji so »po zgledu številnih klubov drugih držav« (Gradivo 1; prim. Farrer, 2019) 9. novembra 2002 prerasla v Klub Slovencev Šanghaj, ustanovljen z namenom »povezovanja Slovencev v Šanghaju in na Kitajskem«, rednega sestajanja, pogovarjanja »o Sloveniji, dogodkih, povezanih s Slovenijo in drugih aktualnih dogajanjih«, izmenjevanja izkušenj »o delu, bivanju, turizmu in ostalih značilnostih Kitajske in njenih prebivalcev« ter podpiranja sodelovanj »med Slovenci in slovenskimi podjetji na Kitajskem« (Gradivo 2). Klub je torej zasledoval tri cilje: govoriti slovensko in gojiti nacionalnost v okolju, kjer so bili Slovenci prostorsko razpršeni znotraj Šanghaja in širše; spoznavati okolje, ki je bilo (vsaj nekaterim) kulturno neznano (Gradivo 3); ter pomagati si kot ekonomski akterji v specifičnem poslovnem okolju. Če je bila slovenščina zapisana v temelje kluba (v skladu s poročilom o ustanovitvi, ki je bilo hkrati vabilo, da se jim pridružijo še drugi), je bil pragmatični smoter kluba izmenjava poslovnih izkušenj. Štirje ustanovitelji kluba so bili namreč predstavniki podjetij: »Sedež [...] smo postavili v Šanghaj, ker v njegovi okolici živi največ predstavnikov slovenskih podjetij. Sestajanje kluba bo služilo izmenjavanju izkušenj, podatkov, svetovanju tako za službene kot osebne namene« (Gradivo 2).

Poleg družabnih so bili v središču vzpostavljanja in formalizacije vezi na širšem območju Šanghaja poslovni motivi. Poslovno okolje Kitajske je bilo namreč za novo prispela slovenska podjetja neznanka. Od različnih sogovornikov sva poslušala o primerih slovenskih podjetij, ki so se opekla, ker njihovi predstavniki niso razumeli navad, dokumentov ter napisanih in nenapisanih pravil. Iskanje sodržavljanov s poslovnimi izkušnjami na Kitajskem je bil zato pričakovani korak. Nekateri so se obrnili tudi na Veleposlaništvo Republike Slovenije na Kitajskem v Peking, od leta 2010 dalje pa tudi na Konzulat Republike Slovenije v Šanghaju, ki sta pomagala po svojih močeh. Klub Slovencev Šanghaj je bil torej poskus oblikovanja lastne platforme za reševanje poslovnih vprašanj; tako je bilo na primer vseh šest udeležencev na enem od sestankov kluba, ki je potekal v marcu 2003, zastopnikov slovenskih podjetij na Kitajskem (Gradivo 3).

Podjetja so bila različna: nekatera so imela na Kitajskem proizvodnjo, druga le predstavništvo, tretja so bila nabavno-izvozna itn. To kaže na različne načine vpetosti akterjev v kitajsko poslovno okolje, saj tovarniška proizvodnja pomeni

zaposlovanje množice delavcev v različnih vlogah (administracija, tehnološki postopki, tovarniški trak itn.), medtem ko mala podjetja in predstavništva lahko delujejo kot »one-man-band«. Poleg slednjih kot posamezniki, ki v kitajski ekonomiji iščejo priložnosti, delujejo še številni drugi akterji, kot so trgovski posredniki, kulturni delavci, učitelji, računalničarji in drugi strokovnjaki za specifična področja. Ti na Kitajskem ne predstavljajo podaljška slovenskih podjetij, temveč samostojno vstopajo na kitajski trg in iščejo priložnosti v hitro razvijajoči se potrošniški družbi. Ker slednji svoje dejavnosti samostojno tržijo in z njimi ustvarjajo individualne življenjske poti, jih imenujemo »podjetniki«, medtem ko predstavnike proizvodnih podjetij imenujemo »menedžerji«.

Zdi se, da so bili motor povezovanja predvsem drugi, prvi pa so se sporadično in glede na sprotne interese vključevali v skupinjenje, ki sva ga opisala zgoraj. Postaviti tovarno namreč pomeni postaviti nekaj trajnejšega, iskanje nižnih priložnosti (od umetnosti do visokotehnoloških inovacij) pa pomeni volatilno pozicioniranje glede na makro in mikroekonomsko okolje. Predvsem mladi v slednjem vidijo karierni potencial (prim. Kefala & Lan, 2022). Njihov preživetveni ekosistem predvideva mobilnost in zasledovanje priložnosti v različnih delih Kitajske. V nasprotju s tem se tovarna ne seli, menedžer pa mora v bližini tovarne ustvariti (začasni) dom.

Med prejemniki vabil v Klub Slovencev Šanghaj pa najdemo še eno skupino: sinologe (Gradivo 4). Leta 1995 so na Filozofski fakulteti Univerze v Ljubljani ustanovili študij sinologije, ki je vključeval učenje kitajskega jezika na Kitajskem. V okviru študija so številni študentje več mesecev bivali na Kitajskem, posamezniki pa so se po študiju tja preselili zaradi zaposlitvenih možnosti, torej v duhu zgoraj definiranih »podjetnikov«. Toda nekatere sinologe moramo v predlagani klasifikaciji videti kot akterje poslovnega okolja »menedžerjev«. Ker ti (še) niso govorili kitajsko, so se namreč zanašali na tolmače, zato so posamezni sinologi sodelovali v tej vlogi. Čeprav v pričujočem članku sinologov ne postavlja v ospredje, jih izpostavlja kot pomembno skupino akterjev, tako zaradi zmožnosti premagovanja jezikovnih ovir kot zaradi različnih vlog v poslovnih procesih.⁷

S pomočjo dokumentov Kluba Slovencev Šanghaj in intervjujev sva identificirala tri tipe akterjev, pri čemer poudarjamo, da je med njimi določena prehodnost. Ker sinologe srečamo tako med »menedžerji« kot med »podjetniki«, se bova v nadaljevanju posvetila le slednjima dvema kategorijama. Med njima obstajajo določene razlike v načinih življenja in izkušanjih vsakdanjika priseljenih slovenskih državljanov na Kitajskem.

7 Poleg »menedžerjev«, »podjetnikov« in »sinologov« na Kitajskem prebivajo tudi predstavniki slovenske države, predvsem zaposleni na veleposlaništvu in konzularnem predstavništvu ter učitelji slovenskega jezika na izbranih kitajskih visokošolskih institucijah (Milharčič Hladnik et al., 2019, str. 125–128).

LOKALIZIRANA IZKUŠNJA PRISELJEVANJA: SUZHOU IN POSLOVNI KLUB ADRIA

Suzhou je v tem tisočletju doživel izjemno demografsko in ekonomsko rast zaradi industrijsko-razvojne cone Suzhou Industrial Park, ustanovljene leta 1994 na vzhodnem robu mesta, na strateški lokaciji z gravitacijo proti Šanghaju. Med Šanghajem in Suzhouom so v tem obdobju zrasle tovarne številnih mednarodnih podjetij, tudi slovenskih. Med letoma 2002 in 2011 so tam postavili tovarne Domel, Hidria, Iskra Avtoelektrika, Sinoslo Technology (skupno podjetje treh slovenskih podjetij: Iskra Zaščite, Iskra Mehanizmi in LeTehnika Kranj) in Wanox (italijansko lastništvo, slovenski menedžment), streljaj dlje pa še Kolektor. S tem je Suzhou z okolico postal eno od mest z večjo koncentracijo slovenskih državljanov na Kitajskem. Ker je mesto relativno majhno in ker so imeli priseljenci skupne izkušnje pri postavitvi in vodenju tovarn, je to vodilo k pogostejšim stikom in povezovanju.

Menedžerji tovarn slovenskih podjetij so bili slovenski državljani, ki jih je podjetje napotilo na delo v tujino in za to priskrbelo materialno osnovo. Menedžerje so spremljali tehnologi, ki so skrbeli za funkcioniranje in izboljševanje tovarniških linij in tovarniškega dela. Nekatera podjetja so zaposlovala posameznike za administrativno, komunikacijsko in operativno delo, za kar je bilo pomembno znanje kitajščine, zato v tem krogu srečamo nekaj sinologov (nekateri od njih so kasneje sami postali menedžerji). Nekateri so tja prišli z družinami, drugi pa so jo tam ustvarili s slovenskimi ali kitajskimi partnerji, zato je družina pomembno vplivala na njihov način življenja, kot tudi na medsebojno povezovanje. Če upoštevamo število slovenskih podjetij in z njimi povezan krog, lahko ocenimo, da je skupina štela nekaj deset ljudi, ki so imeli zaradi skupnih interesov in izkušenj dovolj razlogov, da so vzpostavili redne oblike komuniciranja in rituale srečevanja.

Obstaja nekaj strukturiranih oblik povezovanja, ki so jih izpostavljali sogovorniki. Zanje je bil pomemben komunikacijski kanal »Slovenci na Kitajskem« na superplatformi Weixin. Ustvarila ga je posameznica, ki je takrat prebivala v Suzhouu, vanj pa so (bili) vključeni številni posamezniki (v času naše raziskave je bilo članov več kot 300, med njimi sicer tudi ljudje, ki niso več živeli na Kitajskem). Drugič, v Suzhouu se je družabno življenje te skupine vrtelo okoli skupnih večerij v restavracijah in zabav v t. i. ekspanziji. Moškemu delu kroga je ostala v živem spominu nogometna ekipa, ki so jo organizirali za tedensko rekreacijo, z njo pa so se uvrstili v lokalno nogometno ligo. Od leta 2008 so vsako leto v Suzhouu organizirali »slovenski piknik«, na katerega so vabili vse Slovence na Kitajskem – tja so prišli tudi posamezniki iz Pekinga, Šanghaja in drugih mest. Na eni od fotografij s tega piknika (okoli leta 2013) lahko preštejemo 85 udeležencev. Tretjič, akterji iz Suzhoua so leta 2014 ustanovili Poslovni klub Adria, ki je formaliziral tamkajšnje dejavnosti slovenskih državljanov, kot se spominja sogovornica, pa je tudi organiziral obiske slovenskih tovarn na Kitajskem. Klub je torej deloval na poslovnem, kulturnem in športnem področju. Četrto, za starše je bilo pomembno vprašanje šolanja otrok in jezika. Z medsebojnim

druženjem so ustvarili okolje, kjer so bili otroci v stalnem stiku s slovenščino. Starši so med sabo tudi izmenjevali izkušnje o mednarodnih in kitajskih šolah, prizadevali pa so si tudi za kontinuirano vključenost otrok v kakšno izmed oblik učenja in ohranjanja rabe slovenskega jezika. Tako je slovenska država »z 19. majem 2013 [...] prvič vzpostav[ila] poučevanje slovenskega jezika [...] v dveh mestih, Šanghaju in Suzhou, kjer [je] prebiva[la] glavnina slovenske skupnosti na Kitajskem« (Milharčič Hladnik et al., 2019, str. 126).

Suzhou je torej lokaliziral relativno enovit sloj ljudi s podobnimi interesi in izkušnjami. Nezanemarljivo je dejstvo, da gre za predstavnike pomembnih slovenskih podjetij, ki so imeli finančne in druge vzvode, da so lahko trajno podpirali druženja. Kljub temu iz intervjujev sledi, da je še bolj od finančnih zmožnosti štel aktivni angažma posameznikov, v prvi vrsti »menedžerjev« iz jedrne skupine Poslovnega kluba Adria in njihovih družinskih članov. Družina je bila pomemben dejavnik njihovega povezovanja, kasneje pa tudi rahljanja lokaliziranih vezi v Suzhouu.

Tako kot se je z bliskovitim razvojem Kitajske skupinskost v Suzhouu razcvetela, je součinkovanje osebnih (družinskih) in makroekonomskih dejavnikov pripeljalo do njenega zamiranja. Družinske razmere nekaterih vidnejših akterjev so namreč pogojevale drugačne strategije: otroci, ki so vstopali v dobo študija, so se brez izjem odločali za študiranje izven Kitajske, zaradi česar so tudi starši začeli razmišljati o odhodu. Na to je vplivalo tudi zavedanje, da priselitev na Kitajsko nikoli ni bila »za vedno« in da je bilo že v začetku predpostavljeno, da bodo nekega dne odšli. Hkrati so nekatera vidnejša »slovenska« podjetja prešla v roke novih (neslovenskih) lastnikov ali pa se jim v novih okoliščinah upočasnjene ekonomske rasti (svetovna recesija in ekonomske spremembe na Kitajskem) proizvodnja ni več izplačala, zaradi česar je upadel tudi smisel obstoja slovenskih menedžerjev. Ukrepi za zajezitev epidemije covida-19 so bili nato za nekatere le še katalizator, ki je dokončno zakoličil selitev iz Kitajske. »Zlato obdobje« slovenske skupine v Suzhouu se je tako končalo. Vendar pa to ne pomeni, da v Suzhouu in okolici ni več slovenskih državljanov ali da ne vzdržujejo nekaterih omenjenih strukturiranih oblik povezovanja; nogometne ekipe sicer ni več – deloma zaradi pomanjkanja igralcev, deloma zaradi njihove starosti, kot nam je zaupal eden od sogovornikov – s »tradicionalnimi« jesenskimi pikniki pa še vztrajajo.

NIŠNE PRILOŽNOSTI KITAJSKIH METROPOL

Medtem ko so priseljenci v Suzhouu težili k tvorjenju skupine, so vsebinsko, ekonomsko in življenjsko drugače vpeti priseljenci njihovo prizadevanje opazovali z distance. Na primer: »Bil sem enkrat [na pikniku], pa ne vem, pa z otroci pridejo, galama [...]« Ali pa: »Slovenci v Pekingu so tako hladni, noben se ne druži [...], dol v Šanghaju se skoz dobivajo [...], pa imajo piknike, [...] tukaj [v Pekingu so] vsi mrtvi.« Številni so torej le okušali, pa še to včasih le v skupini Weixin, nacionalno skupinjenje priseljencev.

Razlogi za namerno ali nenamerno distanco so bili različni, od življenjskonazorskih, generacijskih in estetskih do profesionalnih in eksistenčnih. Mnogi so prišli na Kitajsko, da bi si ustvarili preživetje ali uspeli v kateri izmed množice porajajočih se tržnih niš, ki jih je v bliskovitem tempu ustvarjala tamkajšnja ekonomija. Eden izmed teh »podjetnikov« je izjavil, da jim je Kitajska omogočila biti Peter Pan, ker jim ni bilo treba odrasti, ker »karkoli si želel delati, je bilo možno, je bilo ful magično«. Skupno jim je, da jim je Kitajska predstavljala neusahljiv vir priložnosti, vir mnogoterih preživitvenih niš, za katere so imeli občutek, da jih znajo obrniti sebi v prid, pri čemer pa so njihove individualne zgodbe zelo različne. Poglejmo dva primera.

Mojca se je v Pekingu znašla iznenada. V evropski metropoli je doštudirala na polju kreativnih industrij in prejela nepričakovano povabilo, naj svoje delo razstavi v Pekingu. O Kitajski je gojila predstavo povprečne Slovenke ali Slovenca (»kolesa in onesnaževanje«), tam pa odkrila živahen umetniški svet. Bila je recesija, Evropa ni kazala priložnosti, zato se je odločila, da ostane. Trg je bil velik, raznolik, tudi zase je videla priložnosti za preživetje in zanimivo življenje. Kitajsko tistega obdobja je opisala kot državo neizmerne rasti, kjer si je našla ekonomsko gotovost na eni strani in priložnosti za avtorsko izražanje na drugi: »[Ž]ivim v zgodovinskem času, v zgodovinski državi in me šokira, da ni več Slovencev tukaj. Sploh takrat na začetku sem folklo govorila, da naj pridejo, zato ker je bilo res vse mogoče.« Po šestih letih je zaradi boljših poslovnih priložnosti Peking zamenjala za Šanghaj, čeprav ji je bilo žal za mednarodno umetniško sceno glavnega mesta: »[Šanghaj] je vse ful bolj biznis, folk živi v svojem, 'bubblu', hodijo ven samo zahodnjaki, hodijo samo v zahodne bare, branče in ne grejo nikamor.« Sama je veliko potovala (znotraj in zunaj Kitajske) in iskala mednarodna sodelovanja. Tudi v Sloveniji je bila pogosto – vez z matično državo je imela zanjo strateško vlogo, saj je predvidevala, da tuji državljani praviloma v nekem trenutku zapustijo Kitajsko (prim. Farrer, 2019). Pomembni so ji bili tudi stiki s slovenskimi sodržavljanji na Kitajskem, čeprav je ostajala na distanci, ker se ni želela zamejevati: »[Živiš] v nekem, kaj pa vem, svetu random, vse je enostavno zrihtat, jobi pridejo in to zanimivi, skočiš za vikend na Bali – če se ne poročiš in imaš potem tudi otroka ... Potem si zelo hitro streznjena z resnico. Ampak tudi je ful dobro mesto za začeti famijlo, dokler ne pride do osnovnošolske izobrazbe [ki je veliko finančno breme], je pač ful safe, medical je ful dobro [...]. Tako da, ja, težko je potem zapustiti, ker si navajena tega komforta.« Kot je še dodala, ko bo morala, bo odšla, ker svet je velik, zato se bo zagotovo nekje znašla, pa ne nujno v Sloveniji.

Tudi Andrej na Kitajskem živi po spletu naključij in izrazito dinamično. Kot *freelancer* je delal za velika nemška avtomobilska podjetja in pogosto obiskoval avtomobilske sejme, tudi na Kitajskem. Med zaprtjem v času epidemije covid-19 je bil v Sloveniji, ko ga je poklical znanec, ki je potreboval nasvet o Kitajski, ker je odhajal na službeno pot. Zanimalo ga je, kako lahko kolega potuje, ko pa je zaprtje. Slednji ga je povabil zraven, v ekipo, ki se je odpravljala postavljati pomemben infrastrukturni projekt. A ko je ekipa zaključila delo, se z njo ni vrnil, ker ni želel nazaj v zaprto Evropo (Kitajska takrat še ni izvajala drastičnih covid-19 ukrepov), zato je obiskal

prijateljico, Slovenko na Kitajskem. Ta mu je svetovala, naj začne učiti angleščino, ker se tako preživljajo številni tujci (prim. Leonard, 2018; Lan, 2022b), in res mu je uspelo pridobiti delo v vrtcu, na popoldanskem tečaju in pri zasebnikih doma. Delo pa je bilo na robu legalnosti, ker je država omejevala tuje učitelje angleščine, kar je bilo »naporno, je pa [bilo] tudi zanimivo, [ker] ugotoviš, kaj vse se da, in potem sem se spomnil malo na čase bivše Juge, kako mi je mami razlagala, kako pač, kakor pravijo tukaj, vlada ima sistem, ljudje imajo pa način.« Tega nauka se je držal, in tako je zaradi ohranjanja vize začel študirati. Odločil se je za mednarodno trgovino, ker na Kitajskem vidi »veliko business opportunities, pa sem rekel, grem nazaj študirat, da dobim neko biznis izobrazbo«. Ker je iz Slovenije imel izkušnje iz organizacije dogodkov, se je lotil tovrstnega podjetništva – organizacije zasebnih zabav in tematskih večerov v klubih, restavracijah in trgovinah. A ker kot imetnik študentske vize ni smel prejemati dohodkov, se je spet znašel tako, da mu je račun posojala neka podjetnica. Tudi v Sloveniji ima podjetje, ne obremenjuje pa se z vrnitvijo: »[J] az sem rekel, dokler bo šlo, bo šlo, ko ne bo šlo več, pač ne bo šlo več [...]. [Č]e bom ostal tukaj, bom verjetno, ali bom z mojo [slovensko] firmo nekaj delal tukaj, ali pa bom tu odprl [novo], odvisno, kaj bo boljše, kaj bodo boljši pogoji.« Kitajsko vidi kot okolje, kjer bi lahko kot podjetnik tvegale več, kot je pričakovano v Sloveniji: »[Z]a biznis se mi zdi, da [Slovenci] ful nimamo te žilice, mi hočemo vse na safe, ful premalo je te: „Bom riskiral!“ Jaz mislim tako: riskiraš, zgubiš, ali pa narediš.« Kitajska ga v tem pogledu osvobaja.

Pričujoči akterji se izrazito razlikujejo od tistih v prejšnjem razdelku. Medtem ko »menedžerje«, njihov način življenja ter priseljevanje na Kitajsko ali odhajanje s Kitajske definirajo dejavniki proizvodnje in družine, tukaj predstavljene »podjetnike« definira predvsem sprotno odpiranje priložnosti na kitajskem trgu ter lastne potrebe ali želje. Zato lahko opazujemo njihove volatilne življenjsko-karijerne trajektorije, ki jih usmerjajo spremembe na trgu, pa tudi politike kitajske države, ki pomembno vplivajo na makro in mikroekonomska okolja. Zato tudi časovnica njihovega priseljevanja in odseljevanja na Kitajsko ne kaže krivulje, kot smo jo opazili pri »menedžerjih«, ki so v 2000-ih in malo kasneje beležili rast, nato pa upad, ampak so »podjetniki« tja prihajali in od tam odhajali enakomerno, saj je zanje vsako obdobje (celo obdobje koronavirusne epidemije) ustvarilo določene priložnosti.

DISKUSIJA

Priseljevanje slovenskih državljanov na Kitajsko je treba umestiti v zgodovinski trenutek razvoja kitajske države, ki je po letu 2000 pričela žeti uspehe ekonomskih in družbenih reform iz konca sedemdesetih let 20. stoletja in vstopila v obdobje največje gospodarske rasti in sprememb. Zaradi velikega obsega tujih investicij in hitro razvijajočih se potrošniških praks novonastalega srednjega razreda ter aktivnejše vloge Kitajske v globalnih ekonomskih in političnih procesih (npr. iniciativa

Pas in cesta) je prišlo do hitrega naraščanja priselitev na Kitajsko. Del teh procesov – ki jih lahko vidimo kot hkrati globalne (razvoj Kitajske kot gospodarske velesile in središča svetovne industrijske proizvodnje) in lokalne (transformacije kitajske družbe, pojav nišnih tržnih priložnosti, potrebe po specifični delovni sili ter nastanek priseljenjskih balončkov in prostorov v metropolah Kitajske) – so tudi priseljeni slovenski državljani.

Priseljenci iz Slovenije so na Kitajskem videni kot tujci, kot *waiguo ren* (uveljavljen kot nevtralen izraz za tujca ali tujko) ali kot *laowai*, ki je sicer bolj pogovorno, pa tudi bolj kontroveržno poimenovanje z možno slabšalno konotacijo (gl. Farrer, 2019, str. 38), sami pa se identificirajo v kategorijah, povezanih z »namenom« priselitve (npr. »ekspat«), sicer pa po nacionalnosti. A kot sva izpostavila zgoraj, se kljub njihovem nacionalnemu opredeljevanju slovenska nacionalnost na Kitajskem ne povezuje z zgodovinskimi ali sodobnimi kulturnimi imaginariji. Zato meniva, da ima slovenska nacionalnost v kontekstu Kitajske atribut nerazpoznavnosti, kar na različne načine vpliva na življenje in delo slovenskih državljanov v tej državi. Nacionalnost priseljencev ima namreč na Kitajskem pomembno družbeno težo, ker z njo tako državni uradniki in kitajski poslovneži kot prebivalci Kitajske nasploh povezujejo različne pomene, kulturne kapitale in stereotipe. Še več: nacionalnost nima pomembne vloge le za kitajske državljane, temveč tudi za same priseljence v njihovih interakcijah. Če spomniva na uvodno izjavo enega izmed sogovornikov: na Kitajskem ni vseeno, od kod priseljenci prihajajo; če so iz Amerike ali Nemčije, jih z nečim povezujejo, če pa so iz Slovenije, pa »se morajo dokazovati«. Slovenski državljani na Kitajskem nimajo javno vidnih nacionalnih klubov ali prostorov druženja, kot jih imajo zgodovinsko prisotni nacionalno opredeljeni priseljenci, npr. Angleži in Francozi (Farrer, 2019), ali pa sodobni nacionalno opredeljeni veliki investitorji v kitajsko gospodarstvo, npr. Nemci (Kratz et al., 2024). Slovenski državljani na Kitajskem so se svoje nerazpoznavnosti zavedali in jo na različne načine vključevali v priseljenjske strategije.⁸

V članku sva se osredinila na dve strategiji vključevanja slovenskih državljanov v kitajsko gospodarstvo. Na podlagi tega sva vzpostavila dve analitični kategoriji: »menedžerje« in »podjetnike«. Zavedanje o nacionalni nerazpoznavnosti je bilo izrazitejše med »menedžerji«, saj so bili ti v stalnih stikih z »menedžerji« drugih nacionalnosti. Tako so v intervjujih pogosto izpostavljali razliko med sabo in nemškimi državljani. Nemčija je ena izmed ključnih trgovinskih partneric Kitajske, leta 2022 je namreč skoraj 60 odstotkov vseh evropskih investicij na Kitajsko prišlo prav iz Nemčije (Kratz et al., 2024). Predstavniki slovenskih podjetij so se pogosto sklicevali na to, kako povezovanje, pa tudi podpora poslovnim procesom in druženju, poteka med nemškimi priseljenci. Predstavniki velikih nemških avtomobilskih podjetij so namreč ustanavljali močne nacionalne klube s širokim podpornim okoljem: od šol

8 Iz intervjujev je razvidna določena kulturna bližina med državljani držav nekdanje Jugoslavije, na primer obiskovanje Yugo Grilla kot »jugoslovanske restavracije« v Šanghaju ali vključevanje državljanov držav nekdanje Jugoslavije v zgoraj omenjeno slovensko nogometno ekipo v Suzhouu, vendar pa strukturiranega povezovanja med njimi nismo opazili.

in vrtcev do restavracij z nacionalno kulinariko in družabno-kulturnimi programi (Xinhua, 2020). Te prakse so bile zgled predstavnikom slovenskih podjetij, ki so skušali vzpostavljati lastne načine povezovanja, druženja in izobraževanja z nacionalnim predznakom, kot so bili Klub Slovencev Šanghaj, Poslovni klub Adria, pikniki in nogometna ekipa ter prizadevanja za šolanje otrok. Zanje je nacionalno povezovanje pomenilo tako izmenjevanje poslovnih izkušenj kot način angažiranja pri ohranjanju jezikovnih kompetenc njihovih otrok v slovenskem jeziku. Po drugi strani pri »podjetnikih« nacionalna neprepoznavnost v intervjujih ni prišla toliko do izraza, temveč so izpostavljali, da imajo v kitajski ekonomiji več priložnosti, kot bi jih imeli v slovenski oz. evropski. Nacionalna neprepoznavnost je zanje predstavljala možnost delovanja brez predznaka »razvpitih« nacionalnosti, kar pa ni nujno ovira za uspeh – kot se je izrazil sogovornik: »Če si Američan, pa mogoče ni [...] nujno [vedno] pozitivno«.

Med omenjenima kategorijama se kažejo tudi razlike v načinih lokaliziranja priseljske izkušnje. Izkušnja je bila odvisna od tega, kakšne vrste vezi so priseljenci vzdrževali z matično državo. »Menedžerjem« so matična podjetja v Sloveniji omogočila materialno osnovo, s pomočjo katere so si lahko hitro uredili življenje na Kitajskem. Materialna sredstva za proizvodne prostore, najem stanovanja, šolanje otrok, potovanja med Kitajsko in Slovenijo itn. so olajšala tako samo priselitev kot bivanje na Kitajskem. »Menedžerji« so bili v dnevnem stiku s svojimi sodelavci v Sloveniji, saj so usklajevali delovne procese, naročila in tehnična vprašanja. Kljub naporni večurni časovni razliki je ta redna komunikacija pomenila stalno prisotnost »tu in tam hkrati«. Ti priseljenci so bili namreč dvojno lokalno umeščeni: na eni strani v lokalno okolje svojega matičnega podjetja v Sloveniji (pogosto manjši slovenski kraji), na drugi strani pa v lokalno poslovno okolje na Kitajskem (večinoma v Suzhouu in okolici, kjer je bil nameščen njihov proizvodni obrat). V okrožju, kjer so imeli tovarno, so bili v rednih stikih z vrsto državnih uradnikov in lokalnih predstavnikov (npr. industrijskega parka), hkrati pa so bili dovolj dobro obveščeni tudi o dogajanju v matičnem podjetju v Sloveniji. Ob tem so se prek zgoraj opisanih oblik srečevanja aktivno družili z ostalimi slovenskimi priseljenci. Po drugi strani so »podjetniki« vzdrževali manj formalizirane vezi s Slovenijo oziroma slednje zanje niso bile del delovne rutine, ker to za njihovo ekonomsko dejavnost ni bilo potrebno. Na Kitajskem so se primerjalno tudi manj zanašali na nacionalno povezovanje z ostalimi priseljenci iz Slovenije, saj za takšno povezovanje niso imeli skupnega interesa. Nekateri med njimi so gojili stalne vezi z družinskimi člani v Sloveniji. Morda bi jim lahko pripisali »prehodno naravnost« (angl. *transient mentality*; Vasconcelos & Miao, 2023), ker so se aktivno osredotočali na sprotne priložnosti in živeli v pričakovanju sprememb. Hkrati so aktivno gojili povezave z lokalnimi prebivalci, z njimi sodelovali v delovnih procesih in se z njimi veliko družili tudi izven delovnega časa, zaradi česar so se osebno identificirali z določenimi okolji Kitajske. Kot je to identifikacijo opisal eden izmed sogovornikov: »[S]em Pekinžan in vedno bom, to vedno povem, tudi Kitajcem, ne glede, koliko časa sem živel [v Šanghaju], Peking je moj hometown.«

Razlika v izkušnji priseljevanja slovenskih državljanov se nadalje kaže v različnih dinamikah ostajanja na Kitajskem in odhajanja s Kitajske. V obdobju poudarjenega odpiranja Kitajske navzven in močnega priseljevanja v prvih petnajstih letih 21. stoletja se je na širšem območju Suzhoua krepilo skupinjenje slovenskih državljanov, ki pa je kasneje upadalo. Razlogi za slednje so bili na eni strani generacijski in družinski (npr. vprašanje o nadaljnjem šolanju otrok po končani srednji šoli na Kitajskem), na drugi strani pa politični in ekonomski (spreminjanje Kitajske kot naložbenega in proizvodnega okolja ter spremembe v lastništvu slovenskih podjetij na Kitajskem). Trend zapuščanja Kitajske ni bil značilen le za slovenske priseljence; odhode »zahodnjakov« so zaznali tako raziskovalci migracij (Bickenbach & Liu, 2022) kot sogovorniki sami. Nekateri so nama npr. omenili, da je močno upadlo število otrok priseljencev v mednarodnih šolah. Domnevamo lahko, da so številni »menedžerji« na Kitajsko prišli v začetku milenija kot mladi ljudje brez družine ali z mlado družino, ob izteku prejšnjega desetletja pa so njihovi odraščajoči otroci že pogledovali za šolami drugje, s tem pa narekovali selitvene strategije celotne družine – to drži tudi za nekatere slovenske primere. Hkrati so nama »menedžerji« večkrat pojasnili, da je bilo na Kitajskem sčasoma vse manj potreb po vodilnih kadrih iz Evrope, zato so celo ekonomsko močnejša nemška podjetja tam zmanjševala svojo kadrovske prisotnost. Ta pogosto drag kader naj bi vse bolj nadomeščali visoko usposobljeni lokalni zaposleni, ki so se šolali v tujini, govorijo odlično angleško in, tako sogovorniki, lažje sodelujejo z drugimi lokalnimi zaposlenimi. Po drugi strani je na »podjetnike« močno vplivala stroga politika omejevanja stikov in gibanja med pandemijo covid-19 (še posebej v Šanghaju), ker je posegla v poslovne priložnosti. Pri prav vseh priseljencih pa je »šok (ne)mobilnosti« (Xiang et al., 2022) v času covid-19 močno vplival na vzdrževanje družinskih in nedružinskih vezi, kar je dodatno podkrepilo nekatere odločitve o vrnitvi v Slovenijo, ki so predvsem v kategoriji »menedžerji« postale dokončne. Prihodnost priseljevanja na Kitajsko je danes nejasna, a sodeč po nekaterih odzivih naših sogovornikov iz kategorije »podjetnikov« Kitajska še vedno – na nekaterih področjih celo vse bolj – ponuja številne nišne priložnosti, ki bi tja lahko privabile naslednje generacije slovenskih državljanov.

ZAKLJUČEK

Hiter gospodarski razcvet Kitajske v začetku 21. stoletja, ki je to azijsko državo ustoličil kot drugo največje gospodarstvo na svetu (po obsegu bruto družbenega proizvoda), je v zadnjih dveh desetletjih močno spodbudil priseljevanje na Kitajsko. V okviru tega procesa sva se avtorja prispevka osredinila na priseljevanje slovenskih državljanov in njihovo izkušnjo vsakdanjika na Kitajskem. Slednji se tam uvrščajo v navidežno nediferencirano gmoto »tujcev«, »zahodnjakov«, »belcev«, »ekspatov« in drugih sorodnih pripisov, ki pa je v resnici razložena po nacionalnem kriteriju. Slovenski državljani so za razliko od vidnejših nacionalnosti slabše prepoznavni

Evropejci, kljub njihovemu razmeroma majhnemu številu pa so nekateri razvili oblike skupinjenja.

Z metodo narativnih intervjujev, ki smo jih v letu 2024 opravili s slovenskimi državljani z izkušnjo daljšega dela in bivanja na Kitajskem, sva definirala dve analitski kategoriji: »menedžerje« in »podjetnike«. Gre za različne strategije vključevanja v (poslovno) okolje Kitajske: »menedžerji« so vodili proizvodne obrate slovenskih podjetij na Kitajskem, medtem ko so »podjetniki« iskali nišne priložnosti na ogromnem kitajskem potrošniškem trgu. Različni materialni temelji so vodili tudi v različne načine lokaliziranja priseljske izkušnje. Izpostavljenih kategorij pa nikakor ne gre razumeti kot strogo ločenih v izkušnji vsakdanjika, saj bi izkušnje sogovornikov pogosto lahko šteli v obe ali pa v nobeno izmed obeh kategorij.

Analiza časovnosti priseljevanja na Kitajsko je pokazala, da so izkušnje bivanja kot tudi povezovanja ter odločitev o nadaljnjem bivanju in odhodu rezultat tako makroekonomskih dogajanj v kitajskem, slovenskem in globalnem gospodarstvu kot tudi osebnih in družinskih odločitev. Za slovenske državljane je Kitajska nova priseljska destinacija, katere prihodnost je s tega vidika težko napovedati. Kot je pokazala raziskava, so nekateri, še posebej v času epidemije bolezni covid-19, Kitajsko zapustili in se vrnili v Slovenijo ali migrirali kam drugam. Obenem pa so drugi prišli na Kitajsko prav v vrtincu pandemičnih ukrepov in si tam ustvarili svoj prostor pod soncem, odločeni, da zaživijo svoje kitajske sanje. Smiselno se zato zdi, da bi bodoče raziskave priseljevanja na Kitajsko sledile prav njim in njihovim izkušnjam v obdobju vse večjih mednarodnih napetosti in gospodarskih negotovosti.

ZAHVALE IN DRUGI PODATKI

Raziskava, na kateri temelji članek, je bila izvedena v sklopu projekta »PopMed-Sus-Dev: Populacijska medicina in trajnostni razvoj« (ID: 101086139), financiranega iz mehanizma MSCA za izmenjave osebja v okviru programa Obzorje Evropa, programov »Dediščina na obrobjih: novi pogledi na dediščino in identiteto znotraj in okraj nacionalnega« (ARIS P5-0408) in »Etnološke, antropološke in folkloristične raziskave vsakdanjika« (ARIS P6-0088) ter projektov »Izzivi mednarodne delovne mobilnosti v nacionalnem kontekstu: Primer Slovenije« (J5-50182) in »Izolirani ljudje in skupnosti v Sloveniji in na Hrvaškem« (J6-4610). Avtorja se zahvalujeta Evropski komisiji in Javni agenciji za znanstvenoraziskovalno in inovacijsko dejavnost Republike Slovenije (ARIS). Avtorja se zahvalujeta tudi urednicama revije *Dve domovini / Two Homelands* in anonimnima recenzentkama oziroma recenzentoma, predvsem pa sogovornikom in sogovornicam na Kitajskem in v Sloveniji, ki so raziskovalni skupini velikodušno odmerili čas za izčrpne pogovore.

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SUMMARY

“YOU FIND OUT WHAT’S POSSIBLE”: ECONOMIC OPPORTUNITIES AND STRATEGIES OF SLOVENIAN CITIZENS LIVING IN THE PEOPLE’S REPUBLIC OF CHINA

Martina Bofulin, Miha Kozorog

China’s rapid economic boom in the early 21st century, which has made the Asian country the second-largest economy in the world (in terms of gross domestic product), has given a strong boost to immigration to China over the past two decades. Within this process, the paper focuses on the immigration of Slovenian citizens and their experience of everyday life in China. In China, they are classified into a seemingly undifferentiated mass of “foreigners,” “Westerners,” “whites,” “expats,” and other related labels, which is, in reality, differentiated along national lines. Unlike more visible nationalities, Slovenian citizens are among the Europeans who are less easily identifiable by their national affiliation. Despite their relatively small numbers, some have developed forms of groupness.

Using the method of narrative interviews conducted in 2024 with Slovenian citizens working and living in China for a longer time, the authors defined two analytical categories: “managers” and “entrepreneurs,” which represent different strategies of integration into the (business) environment of China. The “managers” managed the Slovenian companies’ production facilities in China, while the “entrepreneurs” sought niche opportunities in the huge Chinese consumer market. Different material foundations have also led to different ways of localizing their immigrant experience. The two categories highlighted should by no means be understood as absolute differences in the experience of everyday life; often, the experiences of the interlocutors could be counted in both categories, or neither.

The analysis of the temporality of immigration to China highlights that the experience of everyday life and sustaining ties as well as the decisions to stay or leave are the result of both macroeconomic developments in the Chinese, Slovenian, and global economies on the one hand, and of personal and family decisions, on the other. For Slovenian citizens, China is a relatively new destination for migration, and it is difficult to predict the future of this immigration. As the authors’ research has shown, some, especially during the COVID-19 pandemic, left China and returned to Slovenia or migrated again elsewhere. At the same time, it was in the maelstrom of pandemic measures that others came to China and found their place under the sun there, determined to live their Chinese dream. It seems sensible, therefore, that future research on immigration to China should follow them and their experiences in a period of increasing international tensions and economic uncertainty.

MIGRATION AND IDENTITY PROCESSES OF SLOVENIANS IN ARGENTINA: A LITERATURE REVIEW

Nadia Molek¹

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ABSTRACT

Migration and Identity Processes of Slovenians in Argentina: A Literature Review

This review analyzes and compares scholarship on Slovenian migration to Argentina, highlighting disparities between Slovenian and Argentine academic approaches. While Slovenian researchers have examined identity, politics, and transnational ties in-depth, Argentine contributions are limited. The study includes works by migrants and descendants, showing how community narratives shape collective memory. It concludes that the literature is rich but marked by national biases, calling for more interdisciplinary, integrative research.

KEYWORDS: Slovenian migrants, Argentina, identity processes, migration processes, narrative literature review

IZVLEČEK

Migracijski in identitetni procesi Slovencev v Argentini: Pregled literature

Avtorica v narativnem pregledu sintetizira in analizira raziskave o slovenski migraciji v Argentino ter primerja pristope slovenskih in argentinskih avtorjev. Ugotavlja, da je v slovenski znanstveni sferi tematika poglobljeno obravnavana, medtem ko je prispevek argentinske akademske sfere omejen. Pri tem v študijo vključuje tudi dela migrantov in njihovih potomcev ter poudarja vlogo skupnostnih voditeljev. Slovensko-argentinske skupnosti so vpete v transnacionalne identitetne procese, zaznamovane z zgodovino, politiko in kulturnim spominom. Študija izpostavi potrebo po bolj integrativnem in interdisciplinarnem pristopu.

KLJUČNE BESEDE: slovenski izseljenci, Argentina, procesi identitete, migracijski procesi, narativni pregled literature

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INTRODUCTION

The migration of Slovenes has been a historically significant phenomenon, shaped by collective strategies and institutionalized practices dating back to the Austro-Hungarian Monarchy. These emigration patterns followed diverse local, regional, and transoceanic directions (Kalc et al., 2024) leading to the establishment of Slovenian communities abroad. Over time, the study of Slovenian emigrants and the diaspora became a crucial research topic in Slovenia, prompting extensive efforts to document and analyze their migration experiences and integration abroad (Kalc, 2017).

One of the key destinations for Slovenian migrants since the 19th century has been Argentina. As part of its modernization and economic development, the country welcomed various contingents of Slovenian immigrants. The first migration occurred between 1878 and 1888, followed by a second migration from the early 20th century until World War I. The third significant migration occurred during the interwar period (1918–1939), while the final major migration, consisting primarily of political exiles, happened between 1947 and the early 1950s.

The migration and identity processes of Slovenes in Argentina have become an important topic in Slovenian migration studies, particularly from a historical perspective. However, while Slovenian scholars have extensively examined this migration trend, it has received relatively little attention in Argentine migration studies. This imbalance highlights the limited impact of Slovenian immigration within the broader landscape of mass migration to Argentina.

This article aims to assess and compare the amount and scope of research conducted on Slovenian migration to Argentina in both Slovenian and Argentine academic contexts. It seeks to provide a comprehensive synthesis of the existing literature, outlining key contributions and analyzing the status of research in both countries. Doing so highlights the significant academic efforts dedicated to this subject while identifying gaps in the literature.

The theoretical framework of this study is grounded in the social sciences, specifically in anthropology, to analyze the migration and identity processes of Slovenian descendants in Argentina within a continuously evolving sociohistorical structure. Migration processes are deeply intertwined with identity formation (Molek, 2022), as they involve not only physical displacement but also the renegotiation of social, cultural, and political affiliations in new contexts (Levitt & Glick Schiller, 2004). In this sense, migrants and their descendants navigate complex identification processes.

Identity is approached as a social, historical, and relational construction rather than a fixed or immutable entity. From an anthropological and social sciences standpoint, identity emerges dynamically through interactions with others and within specific sociocultural contexts (Barth, 1976; Hall, 2003). It is examined as an analytical category rather than a natural phenomenon, structured through self-ascription and external ascription mechanisms, where individuals negotiate, redefine, and

update their affiliations based on historical and discursive frameworks (Brubaker & Cooper, 2000).

Ethnic and national identity, in particular, has been examined through diverse theoretical traditions. Some scholars adopt primordialist approaches, emphasizing natural and emotional ties to a group (Geertz, 1991), while others highlight constructivist perspectives that stress the contingent and performative nature of identity, demonstrating how it is shaped by discourses, practices, and power structures (Restrepo, 2007). In migration contexts, identity becomes even more complex, intersecting with transnationalism, collective memory, and symbolic markers that enable its continuity or intergenerational transformation (Hall, 2019).

This study employs a narrative literature review approach to synthesize the extensive research on Slovenian migration to Argentina. Multiple Slovenian sources—including academic databases such as COBISS and dLib, particularly the journal *Dve domovini / Two Homelands*—were consulted alongside Argentine bibliographic indices and migration studies journals. Additionally, biographical material, publications, documents, and reports from Slovenian associations in Argentina were analyzed (Consejo Directivo, 1981; Kacin, 1937; Rant, 1998). This approach allows for a holistic and contextualized examination of scholarly perspectives, integrating insights from various disciplines (Flick, 2015).

Aiming to examine and compare the research produced in both Slovenian and Argentine academic contexts, the article aims to highlight key contributions to the study of Slovenian migration to Argentina. It also incorporates community-produced materials, emphasizing the role of descendants and community leaders in shaping historical narratives. To achieve this, the article is structured in three sections. The first section provides a historical overview of Slovenian migration to Argentina, analyzing different migration processes and their sociopolitical contexts. It also situates Slovenian migration within broader international migration trends. The second section examines scholarly contributions on the topic, contrasting Slovenian and Argentine academic production. It highlights key research themes, including studies on interwar migration, Slovenian anti-communist refugees, and anthropological and sociocultural perspectives. Finally, the conclusion offers a critical synthesis of historiographical trends, identifying gaps in the existing literature and suggesting directions for future research on Slovenian migration and identity formation in Argentina.

MIGRATION PROCESSES TO ARGENTINA IN THE CONTEXT OF TRANS-OCEANIC MASS MIGRATIONS

The first formal migration from Slovenian territory to Argentina (1878–1888) took place as part of an agreement between the Argentine state and Austria-Hungary (Mislej, 1994; Repič, 2016) in the international context of transoceanic mass migrations.

This relocation included around 50 families from the Slovenian littoral region of Primorska (Kalc, 1995). These families opted for transoceanic mobility to improve their social conditions against a backdrop of crisis and stagnation. Originally, they were intended to colonize the northern province of Formosa. However, the inhospitable living conditions in northern Argentina forced them to look for more accessible areas, such as the province of Entre Ríos. There is no evidence of ethnic organization among these Slovenes in the past (Molek, 2012), and they assimilated within a few generations, effectively making their origins “invisible.”

In the period between the two world wars, around 25,000 Slovenes came to Argentina (Mislej, 1994) to escape the geopolitical reorganization of Slovenia after World War I and the resulting social pressure. For example, in the regions annexed to Italy after this war, a harsh process of denationalization of Slovenes—*de-Slovenization*—combined with impoverishment, forced the Slovenian population to leave their homeland in search of better living conditions (Kacin-Wohinz, 1995; Mislej, 1995). This migration was characterized by its individual character, clear regional demarcation (Molek, 2012), and antifascist ideological orientation (Kalc, 1995; Mislej, 1995). Settlement in Argentina was primarily centered on La Paternal, Villa Devoto, and Saavedra (Buenos Aires), Berisso, Bernal, and Avellaneda (Greater Buenos Aires), and the cities of Rosario, Santa Fe, and Paraná (Entre Ríos province). It was based on personal, family, or social relationships created through migration chains and networks (Molek, 2022).

The migration process of this group did not mean a definitive break with their home country; in some cases, it was not even permanent (Molek, 2018). After World War II, temporary return mobilities began, such as visits to relatives. The connections between Slovenian migrants in Argentina and Slovenia were formalized by the state institution Slovenska izseljenska matica (Slovenian Emigrant Association), whose aim until the end of the 20th century was to maintain relations with the emigrants, strengthen cultural and national ties, award study scholarships in Slovenia and organize a cultural exchange. By the end of the 1990s, 32 Argentine students of Slovenian descent had received scholarships to study in Slovenia, some of whom remained there. There were also significant cultural exchanges between the two countries, such as exhibitions, music tours, and dance and theatre groups (Molek, 2022).

Finally, between 1947 and the late 1950s came the last migration (Velikonja, 1985, pp. 49–50), which consisted of around 6,500 political emigrants who had left Slovenia at the end of World War II for fear of reprisals by the victors (Repič, 2016). Among them were those who had collaborated with the Germans in the fight against the communists and partisans and others who feared being labeled as collaborators because they had belonged to the nationalist *domobranci* (Home Guard). In fact, this fear was not imaginary, as thousands of political opponents or anti-communist Slovenes were executed by the victors and thrown into mass graves.

Before their final exile, they temporarily moved to Red Cross refugee camps in neighboring countries such as Austria and Italy (Repič, 2016; Žigon, 2001a), where

they began the complex process of diasporic organization aimed at political resistance and the preservation of cultural and identity heritage. They built a collective nationalist, Catholic, anti-communist, and anti-Yugoslav memory to process both their traumatic experiences and their exile (Molek, 2012; Žigon, 2001a). The refugees saw themselves as temporary migrants who wanted to stay until the political conditions in their homeland changed (Velikonja, 1985, p. 49). With the help of the Catholic Church, the Red Cross, the International Organization for Refugees, and emigrant organizations in various countries, they got help emigrating to Argentina, Canada, the United States, or Australia.

They organized a translocal, closed, endogamous, and hyper-networked community in Argentina through a central institution: Zedinjenja Slovenija (United Slovenia). For generations, they preserved a hegemonic social memory consolidated through fairs, schools, social and cultural practices, publications, symbols, and commemorative rituals. The obligatory preservation of Slovenian identity, roots, and orientation toward the Catholic faith and the homeland was seen as a moral duty that had to be adhered to so that one could go back once communism had finally left Slovenia. The symbolic impact of social memory was so strong that the inability to return during the four decades of the Yugoslav period did not weaken the longing to “return” to “where they should have been born.” When independence was achieved in 1991, many saw the opportunity to begin the “return process” to “free Slovenia” (Molek 2012). However, in the 1990s, only a few families and individuals actually returned. These returnees founded a new non-profit organization called Slovenija v svetu (Slovenia in the World), initially aimed to “facilitate” the return mobility of Slovenians to their homeland.

SOME OF THE REASONS FOR STUDYING SLOVENIAN MIGRATION TO ARGENTINA

Historically, the Slovenian ethnic territory has experienced significant periods of emigration. Given this context, it is unsurprising that a considerable portion of research in Slovenian migration studies has focused on analyzing migratory dynamics. However, a closer examination of these studies reveals distinct trends shaped by the strategic national interests of the states of which Slovenes were historically a part.

Kalc (2017) highlights, for instance, that while Austria largely overlooked emigration issues, the newly established Yugoslav state after World War I—formed during an era of state-controlled migration policies—significantly emphasized migration management and Yugoslav emigrant communities worldwide. From the outset, Slovenian institutions played a pivotal role in fostering connections, providing mutual support to emigrant communities, and stimulating research on migration history. Notably, Slovenian diaspora communities, particularly in the United States,

advanced in organizational, economic, and cultural development, further fueling academic interest in their migration experiences.

Kalc (2017) also traces the institutionalization of migration research to the creation of the Minority and Emigration Section at the Institute of International Public Law within the Faculty of Law at the University of Ljubljana. This development marked a meaningful step toward establishing migration studies as a multidisciplinary field.

Despite early efforts, the aspiration to systematically study emigration and preserve the historical heritage of Slovenians living abroad remained largely unrealized until the 1950s within the new Socialist Republic of Yugoslavia (Kalc, 2017). The revival of systematic and institutionalized migration research began with the establishment of the Slovenian Emigrant Association in 1951, followed by the creation of the Study Center for the History of Slovenian Emigration at the Slovenian Academy of Sciences and Arts in the 1960s. This center aimed to study emigration and the presence of Slovenians in immigrant countries, collecting archival and documentary material on emigration from Slovenia.

Within the specific context of the second Yugoslavia, where the new nation needed to frame a historical narrative about their migrants, legitimizing certain emigrations (such as anti-fascist immigrants) while “silencing” others considered “enemies” (e.g., the anti-communist exiles), the “scientific” studies about Slovenians abroad emerged. Later, significant progress was made in the 1980s with the establishment of the Institute for Emigration Studies in 1986, which later became part of the newly formed Research Centre of the Slovenian Academy of Sciences and Arts (Kalc, 2017).

This institutionalization of the topic intensified research about Slovenians in Argentina, especially after Slovenia’s independence in 1991. At that time, the Slovenian intellectual and political space began to need a more fruitful debate and understanding of its own national identity. At the same time, Slovenians in neighboring countries, as well as around the world, were pushed to rethink their identities and objectives and negotiate their place in the construction of memory and history in light of the new panorama.

From the 1990s to the early 2010s, scholarship on Slovenian migration to Argentina became particularly diverse and prolific. Two key factors contributed to this development. Firstly, Argentina had been a major destination for political exiles fleeing Yugoslavia after World War II, a significant migratory phenomenon that had previously been understudied or silenced. Secondly, the Argentine economic and political crisis of 2001 led to increased return migration, as many descendants of Slovenian migrants relocated back to Slovenia, further fueling academic interest in migration dynamics, identity transformations, and transnational connections.

HISTORICAL PERSPECTIVES

A significant portion of the research on Slovenians in Argentina within the Slovenian academic context is historically oriented among the most influential contributions to the work of Slovenian–Argentine art historian I. Mislej (1994) stands out. Within this historical framework, scholars have sought to define broad categorizations of Slovenian migration patterns, often resulting in generalized and homogenized classifications. Mislej (1994) played a key role in establishing a widely adopted periodization of Slovenian migration to Argentina, identifying four major processes: the first occurring between 1878 and 1888, the second from the early 20th century until World War I (1908–1914), the third during the interwar period (1918–1939), and the final after World War II (post-1945). This categorization has remained influential in shaping subsequent research on Slovenian migration.

An analysis of the literature and identification discourses of the actors reveals that Slovenian migrants to Argentina are generally classified into three broad identity-based categories: the “Lost Migration,” an actor’s idealized conceptualization referring to the earliest migration, “old immigrants” (*stari Slovenci*), which particularly delineates the immigrants of the interwar period, but for the community of refugees also defines all those who arrived before 1945, and into “new Slovenes” (*novi Slovenci*), which includes all those who arrived after the World War II.

While this dual division between “old” and “new” Slovenes is widely used and captures key historical distinctions, it also presents certain conceptual limitations (Molek, 2022). While useful for highlighting internal differences, these categories often overlook the fluidity, exchanges, and evolving identities among different migration groups. For instance, the label “new Slovenes” does not fully encompass the experiences of Slovenes who migrated to Argentina in the 1950s for reasons unrelated to political exile, such as economic opportunities or professional aspirations (Molek, 2022). Similarly, this classification does not account for individual migration trajectories, including Slovenian families who temporarily returned to Slovenia after World War II, only to later resettle in Argentina.

Studies about early migrations

Historiographically, A. Kalc (1995) examined Slovenian and Friulian emigration to Argentina within the broader context of Austro-Hungarian policies toward ethnic minorities seeking to emigrate. His research traced emigration activities from the Slovenian coastal regions (Primorska and Goriška) to Argentina from the late 19th century until World War I. Complementing this perspective, historian B. Marušič (1995) analyzed the social and economic conditions in Primorska, Goriška, and the Italian city of Trieste during the Austro-Hungarian period, arguing that economic hardship and social instability drove many inhabitants to temporary or permanent migration.

Given that statistical estimations remain one of the primary challenges in the study of Slovenian migration (Lukšič Hacin, 1995), M. Sjekloča's (2004) work plays a key role in quantifying migration patterns using statistical data. However, his quantitative findings have been subject to scholarly debate, particularly regarding their methodological accuracy and reliability.

Studies on early 20th-century Slovenian migration to Argentina remain limited, primarily due to the fragmented and dispersed nature of available historical data. Notably, Mislej (1994; 1995) identified a significant yet understudied contingent of approximately 1,000 professionally trained Slovenian migrants—engineers, technicians, and other skilled workers—who arrived between 1908 and 1914. These migrants quickly integrated into Argentina's public works sector, particularly in the interior provinces. Additionally, Mislej's research underscores the formation of transnational political networks among Slovenian and Yugoslav migrants of Austro-Hungarian origin. This phenomenon became particularly pronounced during World War I.

Studies on interwar migration and their identity processes

Much of the literature focuses on Slovenian migration to Argentina during the interwar period (1918–1939). Scholars such as R. Genorio (1986), I. Mislej (1992a; 1992b; 1994), Z. Žigon (1998), and M. Sjekloča (2004) have provided key foundational studies that characterize the regional origins, professional backgrounds, and settlement patterns of these migrants. Their research is particularly notable for analyzing both migratory processes and integration mechanisms within the broader framework of Argentine assimilationist policies. Additionally, Banko & Mouzakis (2003) contribute by examining push and pull factors influencing migration, particularly emphasizing the role of Slovenian social networks and associations in facilitating integration into Argentine society.

D. Valentinčič (2012) further explores this migration process by examining Slovenian migration from the Venezia Giulia region, focusing on their associative structures and identity formation, which he terms "Beneški Slovenci" (Slovenians from Venezia Giulia). Similarly, historian M. Zobec (2013) provides a localized case study of post–World War I Slovenian emigration from the Primorska region, particularly through the lived experiences of migrants from the village of Pliskovica. His study innovatively applies transnational migration theory, illustrating the intense epistolary exchanges between the homeland and diaspora communities, which sustained connections between these groups. Moreover, Zobec's work sheds light on the racialized and exclusionary discourses embedded in Argentine national identity construction, demonstrating how certain immigrant groups—especially those of Slavic origin—were historically marginalized and subject to sociopolitical discrimination.

The political and identity-related dimensions of interwar Slovenian migration have also received considerable scholarly attention. A crucial area of research investigates the link between fascist denationalization policies targeting coastal Slovenes and migrations (Kacin-Wohinz, 1995). A pioneering study by Genorio (1988) investigates the role of Slovenian migrants from the coastal region in Argentina's international labor movement, highlighting their engagement in political propaganda and ideological mobilization. In this context, Kalc (1995/2016) and Zobec (2022) provide valuable insights into the surveillance and persecution of Slovenian anti-fascist exiles in Argentina. Furthermore, the works of Mislej (1992b) and Sjekloča (2004) expand upon these political dynamics by detailing activist efforts within the Slovenian migrant community. Additionally, Rahten (2016) links the political trajectories of Slovenian migrants to specific policies of the Yugoslav Embassy under Ambassador I. Cankar, providing an important diplomatic and geopolitical perspective. This work challenged earlier economic determinism by highlighting the political dimension of emigration, repositioning these migrants as both economic and political refugees.

Beyond the coastal regions, research has also addressed Slovenian migration from the Prekmurje region, where migrants were often referred to as *Prekmurci* or *Transmurans*. Kuzmič (1995) extensively analyzes this group based on archival materials from the *Mladi Prekmurec* (The Young Transmurian) gazette, published by young Slovenian intellectuals and writers. His study examines economic conditions, social structures, and seasonal migration patterns, noting that Transmurans primarily migrated to Germany, France, and the Americas during the interwar years. Žigon (2003) further contributes to this body of knowledge, adding depth to the understanding of Prekmurje migrants' social and cultural experiences. Additionally, E. Cmor (2002), as an active member of the Transmuran community in Argentina, provides both qualitative and quantitative insights into the demographics and organizational structures of these migrants.

Studies on Slovenian anti-communist refugees

A substantial body of literature examines the experiences of Slovenian anti-communist exiles who migrated to Argentina after World War II. In both academic and local literature, various designations have been applied to this group, including "anti-communist exiles," "anti-communist refugees," and "Slovenian political emigration." Additionally, within Slovenian migration studies, this group has often been called the "new Slovenes," distinguishing them from earlier Slovenian migrations to Argentina.

One of the earliest significant works on this topic—published during the Yugoslav era, despite the ideological constraints of the time—was authored by Slovenian–Argentine cultural entrepreneur K. Cukjati (1986). Before Slovenia's democratization and independence in 1991, scholarly discussions about this group were largely

shaped by pro-Yugoslav intellectual circles, which maintained a critical and ideologically biased stance toward the exiles (e.g., Čuček, 1979). However, after Slovenia's democratization, academics and the exile community actively engaged in reinterpreting and contesting previous narratives, leading to a significant revisionist shift in Slovenian historiography. Particularly noteworthy among these contributions are "enthusiastic" perspectives (e.g., Kermauner, 1992), which emphasize Slovenian political emigration (*Slovenska politična emigracija*, SPE) as a "Slovenian miracle," portraying exiles as key actors in preserving Sloveneness abroad.

Since the 1990s, an increasing number of scholarly contributions have sought to rewrite and renegotiate Slovenia's contemporary history of World War II, incorporating more diverse perspectives. A significant contribution in this direction is that of British lawyer J. Corsellis (1996; 1997; Corsellis & Ferrar, 2007). His studies, drawing on correspondence and life histories of key figures among the *domobranci*, offer a well-researched perspective on the experiences of Slovenian refugees in Argentina. Corsellis highlights occupational patterns within the exile community, noting that Slovenian migrants were primarily absorbed into construction and factory work, while women predominantly engaged in education-related roles. He also underscores the traditional social ethos of the community, particularly its emphasis on voluntary, unpaid work (*ad honorem*) as a defining principle. However, his interpretation has been critiqued for its apologetic tone, as well as for being overly influenced by a Catholic moral framework, potentially overlooking the more complex sociopolitical dimensions of exile life.

Another important research avenue concerns the experience of exiles in refugee camps, which played a pivotal role in shaping social cohesion and group identity. Horvat (1996), Žigon (1998; 2001a), and Repič (2006) have examined these camps as sites of identity crystallization, where shared experiences of displacement fostered a strong collective consciousness. Their work suggests that refugee camps not only preserved social structures but also reinforced ideological and political affiliations, shaping the long-term identity formation of Slovenian exiles.

A further body of research examines identity and cultural development within the Argentine context. A key figure in this field is sociologist Z. Žigon (1998; 2001a; 2001b), whose work significantly advances our understanding of the ideological dimensions of Slovenian exile identity, particularly its anti-communist, Catholic, and nationalist underpinnings. Žigon (1996; 2001a) provides a nuanced analysis of how Slovenian exiles maintained their ethnic identity despite prolonged separation from their homeland. He argues that collective memory played a fundamental role in constructing and preserving this identity, reinforcing a dual sense of belonging—both to Argentina and to an imagined Slovenian homeland.

One of Žigon's key contributions is his examination of the role of endogamy in cultural preservation. His research suggests that intermarriage patterns within the exile community contributed to a sense of ethnic continuity. However, over time, increasing intermarriage with non-Slovenian Argentines led to a gradual process of

de-ethnicization among descendants. This argument is supported by Horvat (1996) and Lukšič Hacin (1995), who similarly observe that while the first generation of exiles largely maintained cultural and linguistic boundaries, subsequent generations have experienced greater assimilation and identity hybridity.

ANTHROPOLOGICAL AND SOCIOCULTURAL PERSPECTIVES

A growing body of research explores Slovenian migration to Argentina from anthropological and sociocultural perspectives, with a strong emphasis on identity formation, intergenerational transitions, and cultural institutions. Several Slovenian scholars have conducted ethnographic fieldwork within Slovenian communities in Argentina, offering valuable insights into the social, cultural, and political dimensions of migration and diaspora life.

Among the early ethnographic studies, J. Mlekuž (1999) provides a geographical and anthropological analysis of Slovenian settlements in the province of Mendoza, detailing the spatial and social structures of these migrant communities. Repič (2006), in contrast, offers an innovative perspective on transnational migration, investigating the mobility of anti-communist Slovenian exiles and their descendants between Argentina and Europe. His research examines how ethnic identity is shaped through the formation of transnational communities, highlighting the role of return migration and diaspora networks in identity maintenance. In a later study, Repič (2019) analyzes anti-Yugoslav political rituals among Slovenian exiles in Argentina, demonstrating how commemorative ceremonies reinforce collective exile memories, shape the diaspora's political ideology, and frame perceptions of Yugoslavia through narratives of war, revolution, and postwar persecution.

Similarly, Toplak (2008) explores the role of artistic creation in shaping social ties and ethnic identity among Slovenian migrants in Buenos Aires. She examines how migrants' artistic expressions engage with local, transnational, and global discourses, offering a unique perspective on the interaction between identity and artistic production across migrant generations.

While the previous corpus, particularly within Slovenian historiography, tends to adopt an essentialist and classificatory approach—framing Slovenian migration in terms of discrete historical periods and stable identity categories such as “old” and “new” Slovenes—my approach seeks to interrogate these very classifications. In this sense, Molek (2019) represents a novelty because I brought together and compared the different migration processes, including the first migration (1878–1888), as well as the most recent processes of ethnogenesis between these descendants and those of the interwar period in the province of Entre Ríos.

Some scholars have framed migration through the lens of generational transitions, examining the intergenerational transfer of identity and cultural practices (e.g., Jenšterle, 1994; Repič, 2006; 2010; 2016; Žigon, 1998). These studies suggest that

descendants of anti-communist exiles tend to actively preserve Slovenian culture and identity, developing an “ambivalent identity” or a hybrid identity “between two cultures.” In contrast, descendants of earlier Slovenian migrations appear to have weaker ethnic boundaries, assimilating more into Argentine society.

The problem of “being Slovenian” has been taken up by various authors (Jenšterle, 1992; Kermauner, 1992; Lukšič Hacin, 1995; Žigon, 1998). From a dynamic standpoint, Repič (2010) argues that identifications among Slovenian descendants should be considered ambiguous and hybrid rather than fixed. Recent migrations between Slovenia and Argentina are historically and causally linked to the post–World War II political emigration from Slovenia, which led to the establishment of a diasporic community in Argentina. This community maintained complex symbolic ties to its homeland, enabling contemporary migrants to assert and (re)activate their Slovenian heritage, cultural identity, sense of belonging, citizenship, and social affiliations. Lukšič Hacin (1995) contrasts the integration and assimilation processes between Slovenian migrants of the interwar period and post–World War II exiles, highlighting differences in social, educational, and ideological backgrounds. She finds that postwar exiles were more committed to voluntary community work, which remains the foundation of their organizational structures. In contrast, interwar migrants sought faster integration into Argentine society. Another key distinction is that postwar exiles developed a temporary consciousness of exile, viewing their migration as a political necessity rather than a permanent relocation.

The issue of Slovenian language continuity has been addressed in various studies. Early works (e.g., Jenšterle, 1989; Žigon, 1996; 1998) examine linguistic retention among exiles and their descendants, while Lukšič Hacin (1995) and Žigon (1998) analyze language use from a sociological perspective. More recently, Molek (2017) provides an integrative and updated study on language practices across the different migration/descendant groups. She concludes that while few descendants of those who migrated during the first and second migration periods actively speak Slovenian, the language remains a key symbol of ethnic belonging.

The associational life of Slovenian migrants in Argentina has been a central research focus, with studies portraying associations as spaces for solidarity, cultural preservation, and integration within the host country. Among the key contributions, Genorio (1988) analyzes the formation of the *Ljudski oder* Workers’ Association, while Mislej (1994) provides a historical overview of Slovenian associations during the interwar period. Scholars such as Žigon (1998) and Sjekloča (2004) compare the associative tendencies of interwar migrants and postwar anti-communist exiles, identifying key organizational structures and identity dynamics within each group. Meanwhile, Jevnikar (1996) and Žigon (2001a; 2001b) specifically focus on the associationism of anti-communist Slovenian exiles, outlining how their institutions played a crucial role in preserving ethnic identity and political engagement.

The Slovenian press in Argentina has played a vital role in cultural preservation, political activism, and identity negotiation. Several authors agree that

Slovenian-language publications flourished during the interwar period (Brecelj, 1992; Mislej, 1996), serving as both a source of documentation on economic and social life and a platform for political struggles between different Slovenian factions. Brecelj (1992) examines the diverse Slovenian press that emerged during the interwar period, exploring how political developments in Yugoslavia and World War II shaped internal tensions within the migrant community. He highlights the ideological divisions within Slovenian–Argentine society, particularly between pro- and anti-Yugoslav factions, as well as between left-wing and clerical nationalist groups. Building on this work, Mislej (1992b; 1996) investigates key anti-fascist publications, such as *Slovenski tednik* (1929), *Novi list* (1933), *Slovenski list* (1937), and *Njiva* (1936–1943). Her research highlights these newspapers’ political stances, ideological conflicts, and broader influence on the Slovenian migrant community. She expands upon Brecelj’s findings on pre-WWII Slovenian media, extending the analysis to the postwar period and the eventual decline of major Slovenian-language publications. A notable argument in Mislej (1992b) is that most Slovenian migrants—having endured decades of Italian fascist repression—initially supported the new Yugoslav regime and sought greater unity among their associations. However, despite this initial cohesion, the Slovenian press in Argentina never fully revived, apart from internal newsletters and occasional contributions to broader immigrant publications. In a later analysis, Mislej (1996) demonstrates how the Slovenian press in Argentina reflected the political tensions, national aspirations, and ideological divisions within the migrant community during the interwar period. She further argues that the extreme polarization of Slovenian society during WWII carried over into the Argentine context, leading to the division of Slovenian media into those who supported the partisan forces (*Osvobodilna fronta*, or OF) and those who defended the nationalist guard (*domobranci*). Later contributions, such as Rot (1992), focus on the journalistic production of anti-communist Slovenian exiles, analyzing how their narratives were shaped through print media and political discourse.

The religious dimension of Slovenian migration has received limited scholarly attention despite its pivotal role in identity formation. Drnovšek (1998) offers a key contribution, demonstrating that the Catholic Church played a fundamental role in preserving Slovenian identity abroad. His work highlights that Slovenian priests served as both religious leaders and cultural mediators, actively promoting national consciousness, the Slovenian language, and traditional customs within Slovenian–Argentine communities. Additionally, Slovenian clergy abroad published religious magazines and other cultural materials, reinforcing Slovenian heritage and moral values within migrant communities.

IDENTITY, RETURN MIGRATION, AND POLITICAL ENGAGEMENT

Since the early 2000s, the question of identity and return migration policies for emigrants and their descendants has gained increasing significance. Several studies (Lukšič Hacin, 2004; Mlekuž, 2004; Žigon, 2002) have analyzed Slovenia's official policies toward its diaspora, highlighting that Slovenian state efforts prioritize identity preservation outside its geographical borders rather than implementing concrete repatriation programs. This reflects a broader trend in migration governance, where cultural and symbolic ties are strengthened without necessarily facilitating physical return.

Most research on return migration and mobility among Slovenian descendants has focused primarily on political exiles from World War II. Lukšič Hacin (2004) and Peterlin (2018) examine the integration processes of Slovenian returnees from Argentina to Slovenia in the 1990s and 2000s, identifying significant sociocultural adjustments and gaps between policy discourse and actual support structures. Mlekuž (2004) investigates the political dimensions of return migration by analyzing Slovenian state policies for returnees. His work underscores the contradictions between official encouragement for return and the lack of substantial institutional support. Pompe (2008) explores the contrast between the idealized image of Slovenia held by Slovenian communities abroad and the complexities of actual relocation. Golob (2009) focuses on returnees and second-generation migrants socialized in Slovenian communities abroad. She finds that Slovenian migrants from Argentina experience multilayered and ambivalent identities shaped by their transnational experiences. Their sense of home and belonging remains fluid, influenced both by their historical attachment to Slovenia and their lived experiences in Argentina.

A central conclusion emerging from these studies is that many migrants maintain connections with both countries, leading to a dual cultural adaptation where Slovenian heritage is preserved while also integrating Argentine customs. This results in a hybrid identity that is neither entirely Slovenian nor fully Argentine.

On the other hand, while many Slovenian emigrants expressed a longing to return, actual post-independence return migration was relatively marginal rather than a large-scale phenomenon (Repič, 2016). This challenges the traditional “myth of return”—the idea that emigrants or their descendants will eventually return to their ancestral homeland.

Interestingly, most of the research in this area has disproportionately focused on the descendants of political exiles, neglecting the return experiences of earlier Slovenian migrant groups (see Table 1). The only study covering return migration before Slovenia's independence in 1991 is Kogej (1982), who reconstructs the return of anti-fascist Slovenians after World War II through archival research and interviews. Her study focuses on the *Partizanka*, a ship that carried returnees back to Yugoslavia. Rogelj (2011) provides a non-academic yet insightful examination of similar cases.

Research area	Key findings	Main contributions
Studies on Early Migration (19th–Early 20th Century)	Research explored socioeconomic and political conditions prompting migration. Works by Kalc and Marušič analyzed Austro-Hungarian policies and economic hardship.	Kalc (1995), Marušič (1995), Mislej (1994; 1995), Sjekloča (2004)
Slovenian Migration processes	Multiple migration processes: pre–WWI, post–WWI, WWII exiles, and post-2001 economic migration.	Mislej (1994), Molek (2019)
Interwar Migration and Identity Processes	Scholars such as Mislej and Genorio examined the assimilation patterns and identity struggles of Slovenes in Argentina, highlighting regional and political influences. Migration patterns from Primorska and Prekmurje, effects of Italian fascist policies, transnational political organizations, the role of Slovenian press and associations in Argentina.	Cmor (2002); Genorio (1986; 1988), Kalc (1995; 2016); Kuzmič (1995), Mislej (1992a; 1994), Žigon (1998), Sjekloča (2004), Banko & Mouzakis (2003), Kacin-Wohinz (1995), Valentinčič (2012), Zobec (2013; 2022)
Occupational Niches	Slovenian immigrants integrated into the construction, meat, and textile industries.	Alonso & Cabaleiro (2002)
Studies on Post–WWII Anti-Communist Refugees	A rich bibliography exists on post–WWII refugees, emphasizing Slovenian exiles’ ideological, religious, and cultural self-sufficiency and their closed, trans-local community.	Cukjati (1986), Corsellis (1996; 1997), Žigon (1996; 2001a), Repič (2006; 2010; 2019), Toplak (2008)
Commemorations & Memory	Rituals of anti-communist remembrance shaped diaspora politics.	Repič (2019)
Anthropological and Sociocultural Perspectives	Research includes identity construction, transnational networks, and generational identity shifts. Scholars like Repič and Molek analyzed evolving ethnic consciousness.	Mlekuž (1999); Molek (2019); Repič (2006); Toplak (2008),
Role of the Press	Slovenian press in Argentina was anti-fascist but later divided on the issue of Yugoslavia.	Brecelj (1992); Mislej (1992b); Rot (1992)

Current Trends and Return Migration	Return migration from Argentina to Slovenia, policy gaps in Slovenian repatriation efforts, transnational citizenship, and political activism and identity negotiations among Slovenian descendants.	Lukšič Hacin (2004), Mlekuž (2004), Žigon (2002), Peterlin (2018), Pompe (2008), Golob (2009), Kogej (1982), Rogelj (2011), Kristen (2007)
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Table 1: Summary of findings on Slovenian migration to Argentina (Slovenian academic context).

Another crucial dimension of Slovenian migration is the exercise of transnational citizenship, particularly political engagement from afar. This common theme in diaspora and transnational studies is well reflected in the analyzed literature. Jenšterle (1992) studies the effects of Slovenia’s independence on Slovenes in Argentina, showing how different migration cohorts responded to the political changes. Žigon (2002) and Kristen (2007) demonstrate that Slovenia’s independence movement was not only supported by the “new Slovenes” (post-WWII anti-communist exiles) but also by interwar migrants and their descendants. These findings challenge the perception of a politically fragmented Slovenian diaspora, showing that various generations actively shaped Slovenia’s national destiny.

SLOVENIANS AS PART OF THE MIGRATION STUDIES IN ARGENTINA

The study of Slovenian migration to Argentina falls within the broader field of Slavic migration studies. However, compared to the extensive body of research on European migrations to Argentina, studies specifically addressing the immigration of Slavic peoples—including their identity formation and integration processes—remain insufficient and underdeveloped.

The return to democracy in Argentina in the early 1980s triggered an intense re-examination of the past, particularly among marginalized communities. Within this context, Argentine anthropology increasingly focused on identity formation and collective memory as central themes, fostering a growing interest in Slavic migration. The first notable academic contributions appeared in the journal *Estudios Migratorios Latinoamericanos* (Stemplowski, 1982). Many early migration studies in Argentina analyzed Slavic migration primarily through narratives of “pioneering” and “colonization,” particularly in rural areas. However, these perspectives often overlooked the presence of indigenous populations that predated these settlements (Molek, 2022). The majority of research on Slavic migration has centered on Polish immigration. However, Croats (Radovich, 1982), Slovenes (Velikonja, 1985), Czechs (Partny, 1994), and Ukrainians (Glinka, 1997) have also been studied.

Interest in Slavic migration intensified in the late 1990s as sociopolitical events increased both academic and policy-related attention to this field. Several works (Marcogliese, 2003; Pacceca, 2000; Texidó, 2004) brought greater visibility and depth to the subject, particularly in response to geopolitical transformations in Eastern Europe (Misetich & Quinteros, 1996), including the Chernobyl nuclear accident, the Balkan war, the case of illegal arms sales from Argentina to Croatia, and the increasing relations with Russia and other “Eastern European” countries made the topic attractive for research. Interest in the need to develop concrete measures for social integration for the phenomenon of the growing numbers of immigrants caused by the disintegration of multinational states in war also increased (Marcogliese, 2003).

Among the studies relating to the populations of the Socialist Republic of Yugoslavia, the studies on Croatian immigration stand out. Rosan (2002) explores the identity and mnemonic processes of the Croatian diaspora in Argentina, providing historical context—also extendable to the Slovenian people—by referring to the Austro-Hungarian Empire, the Kingdom of Yugoslavia, World War II, and the Socialist Federal Republic of Yugoslavia. Radovich (2004; 2016) has various approaches to the Croatian migration process from the perspective of the Dalmatian region. Gadže & Rajković Iveta (2016) analyze the issue of descendants who decided to emigrate to the country of their ancestors after Croatian independence in 1991 from an intergenerational perspective. Gadže (2018) further analyzes the Croatian media and its role in preserving Croatian identity in Buenos Aires and Rosario.

A significant thematic focus in Slavic migration studies is the negotiation of Yugoslav, Slavic, and national identities within the Argentine context. Several studies have analyzed how Slovenes, Croats, Serbs, and other Yugoslav groups defined their identities in relation to both Argentina and their homeland(s). Radovich (2004) provides a quantitative contribution that illustrates the approximate proportions of migratory contingents with Yugoslav nationality, a generic term that, according to the author, includes different peoples (Serbs, Croats, Slovenes, Macedonians, Montenegrins, Bosnians, Herzegovinians, Muslims, Albanians, etc.). He also refers to the conflict that the term “Yugoslav” caused among those nationalities who regarded Yugoslavia as a “prison of peoples.” Also noteworthy are the studies by Misetich & Quinteros (1996) and Solian (2018), which examine the different ways of self-presentations of the Yugoslavs.

Academic research on Slovenian migration in Argentina

One of the first academic studies on Slovenian migration to Argentina was the bachelor thesis by Pedro Rant (1959), completed at the Faculty of Economic Sciences of the University of Buenos Aires. His work provides a detailed analysis of Slovenian immigration periods from 1878 to post-World War II, examining the causes of migration, economic and social adaptation, and integration strategies within the host society. Notably, P. Rant highlights the role of associations, the press, and

educational institutions in the community’s integration and explores the political and economic challenges faced by Slovenians over time.

Despite this early contribution, systematic research on Slovenian migration in Argentina remained scarce until the 1990s. Since then, several scholars have contributed to mapping Slovenian communities and their sociohistorical transformations (see Table 2). M. Maffia (2002) and the team have included the Slovenes (exiles) in their mapping work in Buenos Aires, the location of the Slovenes in the districts of the province. From a historical perspective, F. Devoto (2009, p. 372) mentions the collective to clarify the category of “ethnic environment” and to illustrate the break between the old community structures that emerged among migrants before World War II and the new groups that arrived after the end of it as a product of changing policies in the country of origin (Devoto, 2009, p. 412). Cicogna (2009) refers to Corsellis (1996) and includes the Slovenian exiles of the second postwar period as part of the contingents of refugees that made up the multicultural map of Argentina. Alonso & Cabaleiro (2002) examine the socio-professional integration of an immigrant from Prekmurje, analyzing her placement in occupational niches such as the meat and textile industries. Using life history methods, they amplify the migrant’s own voice, offering a personal perspective within the broader migration experience.

Period	Key themes	Author(s)
Pre-1980s	Early studies on Slavic migration focused primarily on Poles, with limited research on Slovenians. Early documentation of Slovenian migration, press chronicles, by the migrant Hladnik in the 1930s and 1940s, documenting early Slovenian migration. First academic efforts from economic sciences.	Hladnik (1933; 1934; 1937; 1939a; 1939b; 1939c); Rant (1959)
Late 1990s–2000s	The return to democracy in Argentina led to an increasing reinterpretation of the past, with anthropology linking identity and memory. Interest in Slavic and Yugoslav migration intensified due to international events. Studies on Croatian migration advanced, with some references to Slovenians.	Misetich & Quinteros (1996); Radovich (2004; 2016); Rosan (2002).
2010s–Present	Recent anthropological and historical studies have extensively documented Slovenian transnational identity processes in Argentina. Ethnographic research has explored transnational connections, re-ethnicization processes, and memory construction.	Molek (2012; 2020; 2022)

Table 2: Slovenian migration studies in Argentina.

More recently, Molek (2012; 2022) has been crucial in advancing anthropological and historical research on Slovenian migration and identity in Argentina. Her contributions have significantly impacted Spanish-language migration studies, particularly in tracing Slovenes' transnational organizational and identity developments from the late 19th century to the present. Building on the works of Mislej (1994), Repič (1996), and Žigon (2001a), Molek's qualitative and ethnographic research is based on extensive fieldwork, including 120 life stories of Slovenians in Argentina. Her findings challenge the concept of an "authentic" and "definitive" Slovenian identity, advocating for a contextual, cross-border, and longitudinal approach to the study of Slovenian ethnicity (Molek, 2022). Her research particularly stands out for its exploration of memory and identity transformation. She identifies re-ethnicization processes among the descendants of early migration periods, revealing new forms of belonging in socioeconomic crises. These processes manifest in innovative ways, including virtual ethnic-organizational activities through Facebook groups (Molek, 2022), The writing of self-financed (auto)biographies as a form of identity preservation and personal expression (Molek, 2020), Temporary return mobilities to the birthplaces of ancestors, contributing to symbolic reconnection with Slovenian heritage (Molek, 2018).

The native perspective in studies on Slovenian migration to Argentina

The state of the art on Slovenian migration to Argentina would be incomplete without incorporating the native perspective—the knowledge production generated by the protagonists of the identity processes under analysis (see Table 3). The construction and negotiation of a historical narrative have been processes involving different groups, each with varying access to the means of knowledge production (Trouillot, 1995). The literature produced has generally been the work of intellectuals or prominent community leaders, making these writings central reference texts and objects of deliberation within the Slovenian–Argentine diaspora.

The first chronicles of the migration process at the end of the 19th century were written in Slovenian in the 1930s by the priest Janez Hladnik. Having immigrated between the wars, Hladnik became a significant chronicler of Slovenes in Argentina, contributing extensively to the religious journal *Duhovno življenje* (Spiritual Life). Through this publication, he documented his travels across Argentina, Brazil, Paraguay, Uruguay, and Chile, providing detailed accounts of the Slovenian communities or migrants he encountered. His writings included both descriptive chronicles and editorials, particularly before and during World War II, in which he articulated a firm anti-communist stance. His work on *Duhovno življenje* not only served as a historical record of Slovenian networks in Latin America but also reflected and reinforced ideological perspectives within the community.

One of the first female descendants to write about Slovenian migration was Kremžar-Rožaneč (1990), who published in the cultural journal *Meddobje* about

Slovenian families who had settled in the Villa Formosa colony at the end of the 19th century. Her contribution is particularly valuable as it highlights the translocal and transnational connections of Slovenians who settled in northern Argentina, demonstrating that they maintained contact with relatives in Paraguay. Later, one of the first descendants of the 19th-century Slovenian immigrants to publish (self-financed) research on Slovenian migration to the province of Entre Ríos was Carlos Bizai (2001; 2006). His main objective was to make this early migration stream visible and to raise awareness among their descendants about their existence. His work significantly impacted Slovenian descendants in Entre Ríos, many of whom became aware of their ethnic origins through his research.

The migration of the interwar period generated more source material about itself. Slovenian associations in Argentina produced several key documents at the time. Essential contributions on the state of the question can be found in *Slovenski izseljenski koledar za Južno Ameriko za leto 1937* (Calendar of the Slovenian Association Prosvetno društvo for the year 1937) (Kacin, 1937), in the compendium *Zbornik spominu Ivana Cankarja: ob 25. letnici smrti: 1918–1943* (Annals in Memory of Ivan Cankar on the 25th Anniversary of his Death: 1918–1943) (Drašček & Birsá, 1943), published by the Ljudski oder Association in 1943, as well as in a publication honoring the 100th birthday of the poet Simon Gregorčič (Gregorčič, 1945). Other sources include commemorative publications marking anniversaries of Slovenian associations.

In addition to these organizational records, several works more broadly addressed migration processes. Kurinčič (1950; 1965) documented migration waves, while Kacin (1937) and Ličen (1958) examined the challenges of integration into Argentine society. Others focused on regional profiles of migrants, socioeconomic characteristics (Škrbec, 1956), and the careers of Slovenes across different Argentine provinces and cities, such as in the Chaco (Weiss, 1969). Other studies explored cultural life (Kren, 1955), prominent Slovenian personalities (Kurinčič, 1957), and the development of associationism (Kurinčič, 1959). The political practices of Slovenian migrants also received attention (Kurinčič, 1955). Moreover, some immigrants and their descendants who returned to Slovenia after World War II contributed articles to various Slovenian journals and yearbooks, such as *Slovenski izseljenski koledar*, *Rodna gruda*, and *Koledar Mohorjeve družbe*.

During the late 1980s, a generational shift occurred among Slovenians who had migrated in the interwar period. This transition led to an increase in publications written in Spanish. One of the most notable works from this period is the Commemorative Publication of the Yugoslav Mutual Association Triglav (Consejo Directivo, 1981), which chronicles the founding and historical development of the institution. This was followed by additional publications by immigrants and their descendants in previously mentioned journals.

More recently, Slovenia's independence in 1991 sparked increased interest in Slovenian heritage among descendants who do not speak the language or have direct ascriptive continuity with Slovenian identity in Argentina (Molek, 2012). In

this context, some descendants have decided to document their ancestors' stories in books. Bizai (2006) contributed by arguing that many Slovenian immigrants in Entre Ríos did not pass down their ethnic-national identity to their descendants, historically identifying as Austrians or Yugoslavs instead. However, more recent research based on in-depth interviews with interwar migrants and their descendants challenges this argument, showing that many families preserved at least partial Slovenian identity markers (Molek, 2022).

An important contribution comes from D. Brunskole (2017), a native of Las Breñas, Chaco, who published a chronicle of his grandfather Alojz Brunskole's migration journey. His work provides key insights into the regional dimensions of Slovenian migration, as well as the presence of the Gottscheer German minority (*Kočevarji*),¹ a group largely unknown in migration studies.

The community of anti-communist exiles developed a distinct identity-building process through writing, differentiating itself from other Slovenian migration periods. This phenomenon is reflected in extensive literary output, primarily aimed at legitimizing the group's national and ideological-religious positions. Many of these contributions emerged from the intellectual habitus of community leaders, who sought to counteract the meanings ascribed to them by Yugoslav authorities and to construct alternative historical narratives. Much of this literature was published in the Slovenian language in Argentina, with some works also appearing in Slovenia. Various thematic lines can be identified within this corpus.

The most important sources tend to be institutional, with content published in outlets such as *Zbornik – Koledar Svobodne Slovenije* (founded in 1949), the weekly newspaper *Svobodna Slovenija* (founded in 1949), the journal *Meddobje* (founded in 1954), and various commemorative publications (Belič Draksler, 2006; Groznik, 2011; Rant, 1998).

The most widely produced historical works focus on events of World War II, forced exile, and life in refugee camps (Kremžar, 2008; Rant, 2008), the subsequent migration to Argentina (Fink, 2006; Rant, 2008), and everyday life in the new country (Ahčin, 1959; Bajuk, 1952; Eiletz, 2000b; Korošec Kocmur & Kocmur, 2016, among others).

A key contemporary reference is the historical essay by Jože Rant (2008), in which the theologian addresses the moral dilemmas faced by politicians, the Church, and *domobranci* in relation to the occupiers and communism. Rant disputes what he calls "communist propaganda" that claimed the *domobranci* swore allegiance to Hitler, arguing instead—following similar theses by Debeljak—that such assertions

1 The *Kočevarji* (Gottscheers or *Kočevski Nemci*) were a German-speaking farming minority in the Kočevje region, originally settled from Tyrol and Carinthia by the Counts of Ortenburg in the 14th century (Molek, 2022). They maintained a distinct identity for 600 years, but after World War I, the creation of Yugoslavia led to policies of Slovenization, stripping them of linguistic and ethnic recognition. Measures such as forced name changes and job restrictions in public administration drove many to emigrate.

are false and that they had sworn only to the Slovenian homeland in a “spontaneous act of self-defense” (Rant, 2008, p. 157).

Another important body of work is devoted to reflections on Sloveneness, exile, and the philosophical and political dimensions of this migration experience. One of the most influential voices in this field is the exiled philosopher and pedagogue Vinko Brumen (1992; 2010), who explores the ontological dimensions of migration and exile. His contributions are particularly innovative, as they critically examine the intergenerational preservation of Slovenian identity in Argentina. Brumen warns against reproducing a closed community that isolates itself from its surroundings and historical change. He argues that constructing an ahistorical image of the homeland risks alienating younger generations, making it essential for the community to engage with contemporary realities rather than nostalgically clinging to an idealized past (Brumen, 1992, p. 73).

The Marianist theologian Gogala (1996) takes a similar perspective when he reflects on the challenges the Slovenian exile community faced. His work addresses the role of the family, the fear of integration and assimilation, and the rigid enforcement of endogamy as a defense mechanism against cultural absorption. He also discusses the perceived dangers of capitalism, the deliberate severing of ties with relatives in Slovenia, and the reception of visitors from the homeland. A key aspect of Gogala’s analysis is the Church’s central role in maintaining cultural, national, and political identity within the exile community. He describes the Slovenian Church abroad as a bastion against the “communist tyranny” that had taken hold of Slovenia while simultaneously critiquing the excessive politicization of the community, which, in his view, brought it closer to a form of ideological totalitarianism (Gogala, 1994, p. 34). In contrast, Brumen (2010) sees the solution to the identity challenges of the exile community in reforming the Slovenian education system. He suggests that education should not only focus on preserving national heritage but should also encourage critical engagement with both Slovenian and Argentine realities, fostering a more open and dynamic identity rather than one rooted in nostalgia. This theme of identity negotiation is also present in the work of M. Fink (2006), a second-generation exile who explores the identity ambiguity experienced by the descendants of Slovenian migrants. His work provides a personal perspective on the tensions between inherited national identity and the lived experience of growing up in Argentina.

Category	Key themes	Author(s)
Early Chronicles	Documented Slovenian migration across Latin America, contributing to the journal <i>Duhovno življenje</i> . Provided ideological perspectives and historical accounts.	Janez Hladnik (1933; 1934; 1937; 1939a; 1939b; 1939c)
Translocal perspective	Discusses Slovenian families in Villa Formosa and their transnational connections with Paraguay.	Kremžar-Rožaneč (1990)
Early Migration in Entre Rios	Researched Slovenian migration to Entre Ríos (1879–1888, 1926–1936). Helped descendants recognize their ethnic heritage.	C. Bizai (2001; 2006)
Interwar Migration Period—Organizational Sources	Published Slovenian association records, documenting migration and cultural activities.	Kacin (1937), Ljudski oder Association (1943)
Interwar Migration –	Covered migration processes, integration challenges, socioeconomic profiles, careers, and cultural contributions of Slovenes in Argentina. Offered historical reflections and identity narratives from returnees and their descendants	Consejo Directivo (1981), Kurinčič (1950; 1965), Kacin (1937), Ličen (1958), Škrbec (1956);
Regional Migration Insights	Documented his grandfather’s migration story, highlighting Gottscheer Germans in Argentina.	D. Brunskole (2017)
Anti-Communist Exiles—Historical Memory & Identity	Produced historical narratives legitimizing the exile community’s national and ideological position.	Debeljak (1965; 1967), Eiletz (2000a; 2000b), Kremžar (2002; 2008), Klepec (1973), Rant (2008)
Theological & Philosophical Reflections	Explored exile, Slovenian identity, community survival strategies, and ideological engagement.	Brumen (1992; 2010), Gogala (1996)
Identity & Education	Examined identity ambiguity and cultural transmission among Slovenian–Argentine descendants.	Fink (2006)

Table 3: Native Perspective on Slovenian Migration to Argentina

CONCLUSIONS

Slovenian migration to Argentina occurred in multiple phases, each shaped by distinct historical and socio-political factors and influenced by the strategic national interests of the states to which Slovenia belonged at the time. This narrative literature review aimed to identify the dominant research trends on Slovenian migration

to Argentina, providing a comprehensive overview of the state of academic inquiry and comparing scholarly perspectives in Slovenia and Argentina.

Initially, Slovenian academic research on this topic was primarily historical, focusing on the so-called “old Slovenes” until the 1990s. Over time, sociological, geographical, sociocultural, and anthropological perspectives gained prominence, shifting attention toward the “new Slovenes”—the post–World War II anti-communist exiles and their descendants. However, only after Slovenia’s independence in 1991 did significant academic research on Slovenian migration to Argentina expand, primarily within the humanities and social sciences. In contrast, in Argentina, scholarly interest in this topic has remained limited, with most research being carried out by descendants rather than mainstream academia.

Given contemporary global developments—particularly Argentina’s ongoing socioeconomic crises and the renewed emigration of Argentines—processes of re-ethnicization among Slovenian descendants represent an emerging and relevant research area. This review has revealed a gap in the study of individuals’ ethno-national (re)emergence without direct ascriptive continuity with Slovenian identity. This is particularly relevant in light of increasing “return” migration, with individuals of Slovenian descent relocating to Slovenia (Molek, 2022). This phenomenon unfolds in a context where Slovenia faces demographic challenges, including an aging workforce and a declining birth rate, prompting discussions on the necessity of an active labor force. Future research could explore how these descendants integrate into and contribute to Slovenia’s socioeconomic landscape, providing insights into migration policies, identity formation, and labor market dynamics.

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POVZETEK

MIGRACIJSKI IN IDENTITETNI PROCESI SLOVENCEV V ARGENTINI: PREGLED LITERATURE

Nadia Molek

Avtorica v narativnem pregledu literature kritično analizira in primerja obstoječe znanstvene prispevke o slovenski migraciji v Argentino, pri čemer razlikuje med slovensko in argentinsko raziskovalno produkcijo. Ugotavlja, da so se zgodnejše raziskave osredotočale na vzroke za migracije, načine naselitve ter prilagajanje slovenskih skupnosti v okviru širše argentinske migracijske politike. Posebno pozornost so raziskave namenjale medvojnemu obdobju, pri čemer so obravnavale politični aktivizem, kulturne organizacije in težave pri integraciji.

Od devetdesetih let 20. stoletja naprej je zaznati metodološki prehod k vključevanju socioloških, geografskih, kulturnih in antropoloških pristopov, s čimer so v ospredje stopile tudi povojne migracije, zlasti politični begunci. Pomembno vlogo pri klasifikaciji migracijskih procesov ima I. Mislej, medtem ko sta A. Kalc in B. Marušič ponudila dragocen vpogled v emigracijo znotraj avstro-ogrske in medvojne družbeno-ekonomske konjunktore.

Procese migracije in identitete med slovenskimi izseljenci v medvojnem obdobju podrobno obravnavajo I. Mislej, R. Genorio, Z. Žigon in M. Sjekloča. Njihove raziskave razkrivajo poklicne poti in regionalni izvor migrantov ter identitetne izzive v kontekstu argentinske asimilacijske politike. Poleg tega obravnavajo tudi politične in ideološke razsežnosti migracij ter vlogo slovenskih protifašističnih izseljencev v transnacionalnih družbenih gibanjih.

V zadnjem desetletju so študije M. Lukšič Hacin, J. Mlekuža, J. Repiča in M. Zobca, v katerih ti raziskujejo vpliv migracij na kulturno dediščino, identiteto in povratno migracijo ter kažejo, kako simbolni označevalci slovenstva v diaspori vzdržujejo vezi z domovino, razširile razumevanje transgeneracijskih in transnacionalnih vidikov migracij.

Kljub bogatemu korpusu raziskav ostaja slovenska migracija v Argentino razmeroma marginalna tema v argentinski znanosti. Med pomembnejše sodobne prispevke sodijo dela P. Ranta, M. Velikonje ter avtorice prispevka, ki je analizirala reetnizacijo potomcev izven neposredne adskriptivne kontinuitete in ki povezuje slovensko migracijsko znanost tudi s širšim poljem študij vzhodnoevropskih skupnosti v Latinski Ameriki.

Poleg akademske literature imajo pomembno vlogo tudi avtobiografski viri, memoari, zapisi skupnosti in institucionalni arhivi, ki jih soustvarjajo migranti in potomci. Ti viri osvetljujejo subjektivne izkušnje migracije, boje za ohranjanje identitete in procese skupnostne organizacije.

V zaključku avtorica poudarja, da literatura o Slovencih v Argentini osvetljuje kompleksno prepletanje zgodovinskih, političnih in kulturnih procesov, pri čemer pa še vedno ostajajo vrzeli, zlasti na področju sodobne reetnizacije, vloge digitalnih orodij, povratne migracije ter gospodarske integracije potomcev migrantov v Sloveniji.

TEMATSKI SKLOP

DESCENDANTS OF SLOVENIAN EMIGRANTS AND THE
PRESERVATION OF THE SLOVENIAN LANGUAGE AND CULTURE IN
BOSNIA AND HERZEGOVINA
POTOMCI SLOVENSKIH IZSELJENK, IZSELJENCEV TER
OHRANJANJE SLOVENSKEGA JEZIKA IN KULTURE V
BOSNI IN HERCEGOVINI

THEMATIC SECTION

POTOMKE, POTOMCI SLOVENSkih IZSELJENK, IZSELJENCEV TER OHRANJANJE SLOVENSKEGA JEZIKA IN KULTURE V BOSNI IN HERCEGOVINI: UVOD V TEMATSKI SKLOP

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COBISS: LL 1.20

V bilateralnem projektu »Potomci slovenskih izseljencev ter ohranjanje slovenskega jezika v Bosni in Hercegovini / Potomci slovenačih iseljenika i očuvanje slovenačkog jezika u Bosni i Hercegovini« (BI-BA/21-23-018) sta sodelovala Filološka fakulteta Univerze v Banjaluki (vodja Biljana Babić) ter Inštitut za slovensko izseljenstvo in migracije ZRC SAZU (vodja Marijanca Ajša Vižintin). Pričujoči tematski sklop je eden od rezultatov znanstvenoraziskovalnega in terenskega dela, ki je potekalo v času trajanja projekta (1. 7. 2021–30. 6. 2023), ter dveh mednarodnih konferenc (Vižintin et al., 2021; Kern et al., 2023), ki sta potekali 10. 12. 2021 na Univerzi v Banjaluki in 10. 5. 2023 na ZRC SAZU v Ljubljani. Projekt sta financirala Ministrstvo za znanstveni in tehnološki razvoj, visoko šolstvo in informacijsko družbo, Vlada Republike Srbije, Bosna in Hercegovina, ter ARRS, Javna agencija za raziskovalno dejavnost Republike Slovenije (zdaj ARIS, Javna agencija za znanstvenoraziskovalno in inovacijsko dejavnost Republike Slovenije).

Cilj projektne sodelovanja je bil ugotoviti, katere oblike sodelovanja potekajo med organizacijami v Bosni in Hercegovini (slovenska društva, dopolnilni pouk slovenskega jezika in kulture, lektorati na univerzah), evidentirati dvo- in večjezične monografske knjižne izdaje (v slovenščini, srbsčini) ter v splošnih in univerzitetnih knjižnicah pregledati periodične publikacije, ki so obravnavale s Slovenkami, Slovenci povezana besedila v času medvojne in povojne Jugoslavije. V ta namen so raziskovalke, raziskovalci tako v Bosni in Hercegovini kot v Sloveniji opravljali terensko delo (polstrukturirani intervjuji z odgovornimi ali s sodelujočimi v omenjenih organizacijah) in pregledovali gradiva po knjižnicah.

Ljudje so se iz Slovenije v Bosno in Hercegovino preseljevali od 19. stoletja naprej, najprej v okviru Avstro-Ogrske, potem pa Jugoslavije z različnimi imeni (Kržišnik - Bukić, 2007; Koblar, 2008). Damir Josipović v članku »Politično-geografski

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dejavniki selektivnosti notranjih (medrepubliških) migracij v SFRJ (1945–1991) kot primer psevdoprostovoljnih migracij, s poudarkom na Bosni in Hercegovini« tematizira notranje jugoslovanske migracije. Loči tri različna migracijska obdobja v obdobju SFRJ: a) obdobje panjugoslovanske konsolidacije (1945–1953) in utrditve razmejitve med republikami ter afirmacije petih etničnih pripadnosti kot nosilnih jugoslovanskih konstitutivnih narodov; b) obdobje vsejugoslovanskega entuziazma in živahnih notranjih migracij med republikami (1953–1974 stran od matičnih etničnih skupnosti, ki sta ga zaznamovala upad deležev matičnih narodov v republikah in postopna destabilizacija manjšinskih območij visoke rodnosti; c) obdobje supranacionalne dezintegracije (1974–1991), za katero sta značilna specifična migracijska dinamika povratnih migracij ali migracij potomcev nekdanjih preseljenecv v republike etničnega središča ter visok delež heteroetničnih porok in porast nadnacionalnih jugoslovanskih opredelitev. V vseh treh obdobjih se je vzpostavljala tudi poseben tip psevdoprostovoljnih migracij, ki prikriva dejanske razmere soustvarjanja okolščin zaželeno preselitve specifične etnične populacije.

Leta 2014 je v državah naslednicah nekdanje skupne države Jugoslavije delovalo 44 slovenskih društev, od tega 10 v Bosni in Hercegovini (Žitnik Serafin, 2014; 2015), na katero se osredotočamo v tematskem sklopu. V tej državi so še danes organizirana slovenska društva ter dopolnilni pouk slovenskega jezika in kulture, ki je namenjen potomkam in potomcem slovenskih izseljenk in izseljencev (Lokar, 2013; Vižintin, 2015; Tomažič, 2018). Leta 2022 je v Bosni in Hercegovini delovalo še sedem slovenskih kulturnih društev, dopolnilni pouk slovenskega jezika in kulture pa so izvajale tri učiteljice. Poleg organiziranih oblik sodelovanja za slovenske izseljenke, izseljence ter njihove potomke, potomce se je bilo v Bosni in Hercegovini možno učiti slovenski jezik tudi na univerzitetni ravni (lektorati slovenščine), in sicer na dveh univerzah. Povezovanje med omenjenimi oblikami organizacij in možnosti za učenje slovenščine v svojem članku »Učenje slovenskega jezika in ohranjanje slovenske kulture v Bosni in Hercegovini« obravnavata Boris Kern in Marijanca Ajša Vižintin. Predstavljene ugotovitve temeljijo na raziskavi, opravljeni leta 2022 v Bosni in Hercegovini in Sloveniji.

O svetu, razdeljenem na dvoje, kolonizaciji (Fanon, 2010; Sarić et al., 2010; Josipovič, 2012) in pogostih elementih evrocentrizma, na drugi strani pa o jugoslovanski domačnosti v književnih besedilih piše Jaroš Krivec v prispevku »Srečanja s kolonialno Bosno: Slovenski pogledi med evropsko superiornostjo in (jugo) slovansko domačnostjo«. Slovenski avtorji so se pogosto dojemali kot del superiorne evropske civilizacije in poudarjali kulturne razlike, medtem ko so pro(jugo) slovansko usmerjeni avtorji izražali naklonjenost in povezanost s prebivalci Bosne ter slednjo prikazovali kot prostor večkulturnega in miroljubnega sobivanja različnih kultur in religij.

Biljana Babić v članku »Slovenija in slovenski motivi v *Koledarju SPKD Prosvjeta* (1905–1947)« obravnava naslove in novice, povezane s Slovenijo in slovenskimi motivi v izdajah *Koledarja* v vsem obdobju njegovega izhajanja. Prisotnost Slovenije

in slovenskih motivov v *Koledarju* je bila bolj intenzivna v jugoslovanskem obdobju, medtem ko je bila v obdobju avstro-ogrske oblasti skromna. Tematski okviri so obsegali zgodovinska dejstva in geografske opise pokrajin v Sloveniji, besedila o slovenskih pisateljih in drugih znanih osebnostih ter besedila o izobraževanju in jugoslovanstvu. Z naklonjenostjo so pisali o profesorju sarajevske gimnazije Emilijanu Lileku, o pisateljih Ivanu Cankarju in Franu Maslju - Podlimbarskem, o arhitektu Jožetu Plečniku, slikarjih Rihardu Jakopiču in Matiji Jami idr. Edina ženska, o kateri so pisali, je bila slikarka Ivana Kobilca.

Tematski sklop zaključuje prispevek Dušana Tomažiča in Alije Suljića z naslovom »Demografske značilnosti tuzelskih Slovencev in njihova organiziranost«, ki predstavlja mikropogled na eno izmed slovenskih skupnosti v Bosni in Hercegovini, in sicer v Tuzli. Avtorja predstavita vzroke za naseljevanje Slovenk in Slovencev v Tuzlo ter njihovo povezovanje in delovanje od avstro-ogrskih časov pa vse do leta 2023.

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POLITIČNO-GEOGRAFSKI DEJAVNIKI SELEKTIVNOSTI NOTRANJNH (MEDREPUBLIŠKIH) MIGRACIJ V SFRJ (1945–1991) KOT PRIMER PSEVDOPROSTOVOLJNIH MIGRACIJ, S Poudarkom na Bosni in Hercegovini

Damir Josipovič¹

COBISS: 1.01

IZVLEČEK

Politično-geografski dejavniki selektivnosti notranjih (medrepubliških) migracij v SFRJ (1945–1991) kot primer psevdoprostovoljnih migracij, s poudarkom na Bosni in Hercegovini

Notranji migracijski tokovi so bili razmeroma močni že v Kraljevini SHS/Jugoslaviji, v socialistični Jugoslaviji pa so se še znatno okrepili ter spremenili svojo smer in strukturo. Avtor v prispevku predstavi osnovno periodizacijo medrepubliških migracij: a) obdobje panjugoslovanske konsolidacije (1945–1956), b) obdobje vsejugoslovanskega entuziazma (1956–1974) ter c) obdobje supranacionalne dezintegracije (1974–1991). Vsa tri obdobja zaznamuje poseben tip tako imenovanih psevdoprostovoljnih migracij. Avtor pojasni podlago, ustroj in vzročnost notranjih jugoslovanskih migracij ter potrjuje selektivnost migracij na osnovi etnične pripadnosti, s posebnim poudarkom na primeru BiH.

KLJUČNE BESEDE: jugoslovanske migracije, psevdoprostovoljne migracije, Jugoslavija, medrepubliške migracije, etnična selektivnost migracij

ABSTRACT

Political-Geographical Factors of Selectivity of Internal (Inter-Republic) Migrations in the Socialist Federal Republic of Yugoslavia (1945–1991) as an Example of Pseudo-Voluntary Migrations, With an Emphasis on Bosnia and Herzegovina

Internal migrations were relatively strong during the pre-World War II Yugoslav Kingdom; however, in socialist Yugoslavia, they significantly intensified and changed in direction and structure. Three periods of the inter-republic migrations can be roughly discerned: a) the period of pan-Yugoslav consolidation (1945–1956); b) the period of pan-Yugoslav enthusiasm (1956–1974); and c) the period of supranational disintegration (1974–1991). The so-called pseudo-voluntary migration marks each of them. The article explains the basis, structure, and causality of intra-Yugoslav migrations as well as the selectivity of migration based on ethnicity, with a special emphasis on Bosnia and Herzegovina.

KEYWORDS: Yugoslav migration, pseudo-voluntary migration, Yugoslavia, inter-republic migration, ethnic selectivity of migration

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UVOD

Po drugi svetovni vojni je socialistična Jugoslavija postala prizorišče živahnih notranjih migracij. Migracijski tokovi so bili razmeroma močni že v Kraljevini SHS in Kraljevini Jugoslaviji, v povojnem obdobju pa so se pomembno ojačali ter spremenili svojo smer in strukturo. Po ukinitvi banovin ter vzpostavitvi teritorialne ravni najprej ljudskih in kasneje socialističnih republik, temelječih na historičnih mejah, je nastopilo skoraj polstoletno obdobje relativno stabilne teritorialne ureditve. Do leta 1929 je veljala upravna ureditev, ki je bila nasledek mirovnih pogodb po koncu prve svetovne vojne in ni temeljila na etničnem načelu, temveč na mejah zgodovinskih dežel ter njihovih notranje-upravnih okrožjih in okrajih. Poskus uveljavljanja etničnega načela v Kraljevini SHS je sledil šele leta 1929 z uvedbo prve delitve na deset upravnih enot (devet banovin in okrožje glavnega mesta) ter preimenovanja v Kraljevino Jugoslavijo. Čeprav je uradno obstajala le ena, jugoslovanska narodnost (en narod treh plemen), je zelo jasno zaznati namen oblikovanja prostorsko čim večjih banovin s pravoslavno večino, ki bi posegle na ozemlje nekdanj avstro-ogrskega dela države (Bosna in Hercegovina, Baranja, Bačka, Banata, Srem, Dalmacija). Po drugi strani ni bilo niti ene banovine z islamsko večino ter le tri z rimskokatoliško večino (Savska in Primorska banovina s hrvaško večino, Dravska s slovensko), pri čemer je bilo rimokatoliške veroizpovedi več kot 37 odstotkov prebivalstva (Preglednica 1). Tako je bilo v kar sedmih od desetih upravnih enot prebivalstvo večinsko pravoslavne veroizpovedi.

	Pravoslavna	rimokatoliška	evangelicianska	druge krščanske	islamska	druge in neznano
<i>Kraljevina Jugoslavija</i>	48,70	37,45	1,66	0,49	11,20	0,50
Dravska	0,59	96,75	2,25	0,23	0,08	0,10
Drinska	64,70	11,05	0,25	0,12	23,23	0,66
Donavska	58,36	32,45	7,03	1,25	0,11	0,79
Moravska	95,05	0,77	0,02	0,02	4,10	0,05
Primorska	15,35	76,80	0,02	0,07	7,69	0,07
Savska	19,12	78,49	0,81	0,70	0,14	0,74
Vardarska	66,45	1,17	0,03	0,15	31,72	0,48
Vrbaška	57,89	16,66	0,33	0,89	24,12	0,11
Zetska	55,81	9,96	0,02	0,04	34,11	0,07
Uprava mesta Beograd	72,49	19,65	2,56	0,71	1,32	3,27

Preglednica 1: Prebivalstvo po veroizpovedi, Kraljevina Jugoslavija, banovine, leto 1931, v odstotkih (vir: Kraljevina Jugoslavija, 1931).

Ker na ta način ni bilo mogoče reševati mednacionalnih sporov, ki so se v parlamentu razvneli že kmalu po oblikovanju Kraljevine SHS in uboju bratov Radić, predstavnikov Hrvaške kmečke stranke (HSS), ter kasneje ustaško-makedonskem atentatu na kralja Aleksandra, je bil ustroj nove, poveljne Jugoslavije postavljen na povsem nove temelje. Z deklarirano enakopravnostjo narodov in narodnosti Jugoslavije kot socialistične države delovnega ljudstva se je krenilo na pot preseganja medetničnih sporov, hkrati pa so se teritorialno-upravne razmejitve v izhodišču vrnile na historične meje, z nekaterimi bistvenimi popravki. Tako je bil osrednji in vzhodni Srem odvzet Hrvaški (Slavoniji) ter z novo osnovano avtonomno pokrajino Vojvodino priključen Srbiji. Nadalje je bila Hrvaški (Dalmaciji) odvzeta Boka Kotorska s primorjem do Bara, ki je bila priključena novo formirani ljudski republiki Črni gori. Slednji je bila odvzeta Metohija, ki je bila priključena Srbiji z novo formirano kosovsko-metohijsko avtonomno oblast. Večina ozemlja občine Zavalje s hrvaško večino je bila izločena iz okraja Titova Korenica ter priključena okraju Bihać in s tem Bosni in Hercegovini, slednja pa se je odpovedala Sutorini in dostopu do morja v Boki Kotorski, ki je bila priključena Črni gori. Po drugi strani problema Neuma in ozemeljske ločenosti območja nekdanje Dubrovniške republike od preostanka Dalmacije niso razrešili. Slovensko-hrvaška razmejitev je v veliki meri sledila predhodnim mejam, izjema je bila Istra, kjer so potek meje potrdili do leta 1956. Poleg Marindola in Drag v Beli krajini je bilo Sloveniji priključeno še območje Razkrižja iz nekdanje občine Štrigova. Meja z Makedonijo je nastala povsem na novo, pri čemer je večinoma sledila historičnim mejam, kar je Srbija kompenzirala s priključitvijo avtonomne pokrajine Vojvodine (Boban, 1995).

Po konsolidaciji jugoslovanskega teritorija lahko v glavnem od leta 1948, popolnoma pa od leta 1956 leta podrobno spremljamo smeri selitev jugoslovanskega prebivalstva med posameznimi republikami in avtonomnimi pokrajinami. Prav ti tokovi nam ob poznavanju konteksta razkrivajo pogosto etnično ozadje specifičnih tokov. Gonilo oziroma potisni faktor preseljevanja med nekdanjimi jugoslovanskimi republikami in pokrajinami niso bile zgolj ekonomske razmere kot take, pač pa ideološki (razvoj ideje enovitega jugoslovanstva) ter predvsem politični pritiski z demografskimi in ekonomskimi posledicami.

Večina republik je bila z avnojskimi sklepi utemeljena na njihovi naslovni etniji, s čimer sta jim pripadli konstitutivnost in suverenost na ozemlju celotne Jugoslavije, njihova suverenost pa je bila izenačena s suverenostjo delovnega ljudstva v brezrazredni družbi kot enakopravnega prebivalstva ne glede na veroizpoved, etnično pripadnost, spol, stan ali katero drugo osebno okolščino (Josipovič, 2014). V praksi pa je v določenih okoljih vendarle prihajalo do izrazitih poskusov dominacije in prevlade moči. Tako se je npr. v knjižici za interno rabo Centralnega komiteja zveze komunistov Srbije kot temeljne republiške platforme za razpravo o družbenih in ekonomskih vprašanjih že pojavil problemski sklop »določene nacionalne prepotentnosti«, v katerem je bil analiziran zlasti socialni izvor nacionalizma pri Srbih, prisotna pa je bila tudi kritika srbskega kulturnega nacionalizma v Vojvodini, Bosni in

Hercegovini ter na Hrvaškem, ki se mu je zoperstavljal zlasti zagrebški komunistični intelektualni krog (Centralni komitet Saveza komunista Srbije, 1966, str. 18, 49). Zato je v prispevku poudarek na analizi etničnih migracij Bosne in Hercegovine, kot izrazito večnacionalne republike utemeljene na sklepih ZAVNOBiH.¹

Bosna in Hercegovina je bila s površino okrog 51.000 km² po velikosti podobna ožji Srbiji in nekaj manjša od Hrvaške (okrog 57.000 km²). S približno 4,4 milijona prebivalcev oziroma 18,3-odstotnim deležem prebivalstva SFRJ ob razpadu Jugoslavije je bila tretja za Srbijo in Hrvaško. Za njen teritorij je še v Kraljevini SHS in predvojni Jugoslaviji potekala ostra bitka med srbskimi in hrvaškimi nacionalisti. Srbska stran je ta območja videla kot vojni plen in priložnost za širitev globoko na zahod, hrvaška stran pa je v srbskem teritorialnem prodoru na zahod videla nevarnost za obstoj hrvaškega prebivalstva v območjih šibke srbske prevlade v posameznih predelih Bosne (zlasti Vrbaska banovina oz. območje Banje Luke ter območje Bosenske Posavine). Ker so predvojni podatki vezani le na veroizpoved, je treba o etnični pripadnosti v Bosni in Hercegovini sklepati posredno. V grobem velja, da se je večina pravoslavnih prebivalcev opredeljevala za Srbe, večina katolikov za Hrvate, večina muslimanov pa za neopredeljene Jugoslovane – muslimane oziroma Muslimane, ko je bil slednjim priznan status jugoslovanskega naroda (1971), ob razpadu Jugoslavije pa postopoma tudi že za Bošnjake.

Bosna in Hercegovina ima zelo nenavadno geografsko porazdelitev konstitutivnih etničnih skupin. Srbi prevladujejo v Podrinju ob meji s Srbijo, vendar so izrazito pomešani z Muslimani. Poleg tega predstavljajo rahlo večino pred Muslimani in Hrvati v Bosenski krajini (nekdanji Turški Hrvaški)² in vzhodnem delu Hercegovine, ob meji s Črno goro, kjer so lokalno večinsko zastopani tudi Hrvati, manj pa Muslimani. Ta tri

1 ZAVNOBiH je kratica za *Zemaljsko antifašističko vijeće narodnog oslobođenja Bosne i Hercegovine* (»Pokrajinski antifašistični svet narodne osvoboditve Bosne in Hercegovine«). Kot je za Bosno in Hercegovino ugotavljal predsedujoči AVNOJ-u, dr. Ivan Ribar, je »narodnoosvobodilno gibanje ustvarilo v Bosni in Hercegovini primer borbene enotnosti in bratstva vseh naših narodov. Narodi Bosne in Hercegovine so v borbi, ki je očarala ves svet, izgradili svojo resnično demokratsko oblast, ki se pričinja z vaškimi narodnoosvobodilnimi odbori, končuje pa se z ZAVNOBiH kot najvišjim političnim predstavništvom narodov Bosne in Hercegovine« (ZAVNO-BiH, 1953, str. 6–7).

2 Turška Hrvaška je historično ozemlje med rekama Uno in Vrbasom, ki ga je Hrvaška postopoma izgubila med osmanskimi osvajanjem, od hrvaško-slavonskega poraza na Krbavskem polju leta 1493 do 17. stoletja. V tem času se je precej spremenila etnična in jezikovna slika tega območja. Prebivalstvo je v obdobju 150 let emigriralo poleg Gradišćanske tudi na Kranjsko in Štajersko, zlasti v Posavje in Posotelje. Jezikovno je šlo večinoma za ikavske kajkavce in govore podobne jeziku Trubarja, Bohoriča in Dalmatina (Zečević, 2000, str. 149–150), kasneje tudi za čakavce in pa ščakavce, ki so izvorno sodili h kajkavcem (Lončarić, 2005, str. 36). Preostalo katoliško prebivalstvo je večinoma konvertiralo v pravoslavje kot edino dopustno krščansko religijo v Osmanskem imperiju z izjemo katolištva v rudarsko-premogovniških krajih po »saškem zakonu« o rudarstvu v sultanatu (Kanun Sas). Na prazne posesti so osmanske oblasti naseljevale pretežno ikavsko-ijekavske novoštokavce iz stare Hercegovine (vključno s Črno goro) ter severne do srednje Albanije in poslovanjene Vlahe. Zato se je tudi jezik pri vseh treh veroizpovedih večinoma na novo »štokaviziral«, pri čemer pa je v siceršnji pretežno ijekavski govorici ohranil ikavske in ščakavske elemente (Crnić Novosel, 2019, str. 32–33, 40–41).

območja med seboj niso sklenjena, zato je bilo za srbske nacionaliste še posebno pomembno vprašanje osvojitve posavskega in podrinskega koridorja. Hrvati prevladujejo v zahodni Hercegovini in Herceg-Bosni (območje Tropolja na prehodu Hercegovine v Bosensko krajino: Livno, Duvno (Tomislavgrad), Kupres). Večinsko so prisotni v severnem delu, v Posavini (Bosenskem Posavju) in okrog Tuzle, v srednji Bosni kompaktno med Jajcem in Kreševim ter pomešani z Muslimani na območju med gornjim Vrbasom in dolino reke Bosne, živijo pa še v posameznih rudarskih »otokih« vzhodne Bosne (Vareš, Olovo, Ilijaš) in Bosenske krajine (Ljubija, Ivanjska, Banja Luka). Muslimani nikjer niso predstavljali izrazite večine, primeroma malo pa jih je bilo v zahodni in vzhodni Hercegovini ter v južnem delu Bosenske krajine. Izrazito večino so predstavljali le na skrajnem zahodu (Cazinska krajina), sicer pa so bili v srednji Bosni in ob Neretvi v Hercegovini pomešani s Hrvati, v Podrinju pa s Srbi.

Cilj prispevka je bil ugotoviti, na kakšen način se je z uradnimi jugoslovanskimi statističnimi podatki o migracijah prikrito ali neprikrito izvajala ideja srbske homogenizacije (o kateri poroča prej omenjena knjižica srbske zveze komunistov), in ali lahko te migracije obravnavamo kot navidezno svobodne oziroma psevdoprostovoljne (Josipović, 2013). Domnevamo lahko namreč, da so bili emigracijski pritiski orientirani predvsem na prebivalstvo nesrbskih narodov in narodnosti v tistih predelih Bosne in Hercegovine, iz katerih je pred tem veliko srbskega prebivalstva odšlo v Vojvodino in v katerih se je zato postopoma spreminjala lokalna etnična struktura, nato v območjih šibke srbske večine (za konsolidacijo teh območij) ter končno na območjih »kontinuitetnih« ozemelj, ki so jih v filozofiji velikosrbske homogenizacije želele oblasti »srbizirati« oziroma utrditi v srbstvu (Čubrilović, 1991). Gre za obsežna območja severne Bosne, znotraj te pa za Bosensko krajino z mesti Banja Luka, Prijedor, Sanski Most, Ključ, Bihać idr. ter za Bosensko Posavino med Dobojem in Brčkim.

Ali lahko po drugi strani v primeru preseljevanja neke etnične skupnosti iz domnevno »avtohtonih« in osrednjih območij v imigracijsko območje apriorno zavr-nemo politično-geografsko determinacijo in njene etnične elemente, kot nakazuje Ruža Petrović (1987, str. 17)? Ta v nadaljevanju sicer pravi, da v omenjenem primeru, ko etnični dejavnik ne deluje, delujejo pretežno ekonomski in drugi družbeni razlogi (poroke, službene premestitve, šolanje ipd.). Na enak način se ji zdi malo verjetno preseljevanje iz enega »avtohtonega« območja neke skupine na drugo »avtohtono« območje (Petrović, 1987, str. 17). Vsekakor toga postavitev zgolj hipotetične možnosti delovanja etničnega dejavnika v determinaciji migracij ne more biti ne točna ne koristna, saj zapira možnosti učinkovanja in lokalne manifestacije izražanja. Petrović (1987, str. 16) namreč sama pravi, da obstajajo tudi globlje, artikulirane in latentne oblike delovanja etničnega elementa v determinaciji migracij. To še posebej velja za etnično-družbene tenzije in krize, ki so Jugoslavijo pretresale praktično vse od njenega nastanka. V tem kontekstu lahko spomnimo na izrazit primer zlasti kosovskih, pa tudi makedonskih Albancev, ki so bili celo v svetovnem merilu označeni kot nosilci »agresivnega rodnostnega obnašanja« (Stanton, 2003, str. 49–50, 109). Kljub temu je prispevek Ruže Petrović k prepoznavanju etničnega dejavnika kot

nosilca nekaterih migracijskih tokov zelo pomemben. Po eni strani gre za temeljito kvantitativno podprt pristop, po drugi strani pa tudi za pronicljivo kritiko ekonomske determinacije migracij v okviru SFRJ. V enem od pasusov R. Petrović pokaže razumevanje kompleksnosti migracijskih determinant, ko ekonomskim dejavnikom zoperstavi tezo o odločilnem vplivu osebnih odločitev in psiholoških dejavnikov (Petrović, 1987, str. 15). Hkrati pa se zaveda, da se psihološko-osebnostnih in motivacijskih dejavnikov ne da izpeljati in razumeti brez interdisciplinarnega pristopa, saj je statistično in demografsko gradivo le osnova za nadaljnja poglobljena proučevanja.

OZADJE POLITIČNO-GEOGRAFSKIH DEJAVNIKOV EMIGRACIJE S POUDARKOM NA BOSNI IN HERCEGOVINI

V obdobju konsolidacije jugoslovanske države in razvoja v socialistični smeri je prišlo do masovne urbanizacije zaradi odpiranja številnih tovarn in drugih delovnih mest, ki so imela za posledico ruralno-urbane migracije. Te migracije so odločilno vplivale na deagrarizacijo in upad nepismenosti. Pri tem pa številni podatki kažejo, da etničnost v tem obdobju ni bila nepomembna, popisno ter drugo uradno opredeljevanje pa ne samo sebi namen. Posebej pomembni so podatki o udeležbi prebivalstva v odborih lokalne in delavske samouprave (skupnosti), kjer so se morali kandidati tudi etnično opredeliti. Leta 1960 je etnična pripadnost odločilno vplivala na strukturo izvoljenih odbornikov marsikje v Jugoslaviji, najizraziteje pa v Bosni in Hercegovini. Poglejmo ozadje: Bosna in Hercegovina je bila središče protifašističnega upora med drugo svetovno vojno. Ta odpor je bil sicer splošen, a so v etničnem smislu tako v Bosni in Hercegovini kot tudi na Hrvaškem med partizanstvom sprva prevladovali bosenski Srbi. Zgodovinsko gledano pa je v velikosrbskih idejnih zasnovah prav Bosna in Hercegovina igrala eno najpomembnejših vlog v velikosrbskem programu *Načertanije*. Predstavljala je potencialno in predvideno ekspanzijo Srbije na zahod in jugozahod (Garašanin, 1844). Ta geopolitika je imela globoke korenine v začetkih moderne srbske državnosti in pretrganju s podložnostjo Osmanskemu imperiju, še globlje pa so bile njene posledice. Če torej upoštevamo značaj NOB v BiH, nam je lahko jasnejši ustroj delavskih svetov kljub formalni družbeni »nepomembnosti« ali postranskosti etnične pripadnosti.

ETNIČNA PREFERENCA LOKALNE IN DELAVSKE SAMOUPRAVE LETA 1960 IN 1967

Etnična pripadnost je igrala ključno vlogo pri kadriranju v vsem novojugoslovanskem obdobju. Tako so imeli leta 1960 v Bosni in Hercegovini Srbi kar 65,0 % vseh občinskih svetnikov (delegatov, odbornikov), kljub le 42,9-odstotnem deležu celotnega prebivalstva. V skladu s tem so imeli vsi ostali razen Črnogorcev (0,6 % : 0,4 %) nižje deleže

predstavnikov v primerjavi s skupnimi. Hrvati so bili blizu svojega skupnega deleža (20,6 % : 21,7 %), predvsem po zaslugi kompaktno poseljenih območij v Hercegovini, Posavini in Srednji Bosni, medtem ko so bili Muslimani (Bošnjaki) najbolj deprivilegirana skupina, saj so kljub 34,1-odstotnem deležu v prebivalstvu zasedali le 13,2 % odborniških mest (Savezni zavod za statistiko SFRJ, 1962; Savezni zavod za statistiko SFRJ, 1961).

K situaciji, v kateri so se znašli Muslimani, je prispeval še en geografski dejavnik, in sicer tip poselitve. Naseljevali so pretežno urbana in polurbana območja, podežele pa bolj izjemoma, v primeru regionalno-geografsko specifičnih območij (kot npr. že omenjena Cazinska krajina). Še bolj drastične razmere so vladale v svetih delavske samouprave (sveti proizvajalcev), kjer so Srbi predstavljali 66,2 %, Hrvati 20,3 %, Muslimani (Bošnjaki) pa le 12,0 %. Obenem so Črnogorci z 0,7 % oziroma z indeksom 175 (faktor 1,75) za skoraj dvakrat presegali skupni delež v prebivalstvu (Savezni zavod za statistiko SFRJ, 1962; Savezni zavod za statistiko SFRJ, 1961).

Do leta 1967 so se razmere le malo spremenile. Sicer pa se po koncu druge svetovne vojne izobrazbena struktura med republikami ni toliko razlikovala, da bi dovoljevala tako disproporcionalno strukturo občinskih svetnikov (odbornikov) ter svetov delavskih skupnosti. Je pa stanju v BiH gotovo botrovalo tudi nezaupanje Srbov, kot zmagovalne strani, do Muslimanov in Hrvatov, saj je bila Srbom kolektivno priznana vloga žrtve, hkrati pa so kot vodilna etnična skupina v NOB na ozemlju Bosne in Hercegovine po osvoboditvi prevzeli tudi najpomembnejše položaje tako v Komunistični partiji kot posledično na poslovodskih mestih – kot varuhi pridobitev revolucije. Ali in koliko je bila ta pozicija zlorabljena za druge cilje, je obsežno vprašanje, na katerega v tem prispevku ne moremo podati celovitega odgovora. Lahko pa potrdimo, da se je etnična prevlada premo sorazmerno odražala v strukturi delavskih svetov.

Glede lokalno-političnega zastopstva narodnosti po republikah SFRJ lahko v splošnem ugotovimo, da so bile po vseh republikah konstantno v podrejenem položaju vse etnične manjšine (narodnosti), še posebej tiste, ki so na območjih tradicionalne poselitve predstavljale pomemben delež v lokalnem prebivalstvu. Tako so bili izrazito podpovprečno zastopani Albanci in Vlahi v Srbiji, na Kosovu, v Črni Gori in Makedoniji, na drugi strani pa Madžari v Vojvodini, na Hrvaškem in v Sloveniji. Med narodi so bili Muslimani v podrejenem položaju praktično povsod, najbolj pa v Bosni in Hercegovini ter v Črni Gori, Hrvati pa na Hrvaškem in v Bosni in Hercegovini. Srbi so bili podpovprečno zastopani le v Črni Gori in Srbiji – torej tam, kjer je prevladovalo pravoslavno prebivalstvo, šteto kot a priori lojalno zaradi pripadnosti srbski pravoslavni cerkvi.³ Namesto Srbov so bili tam v obeh primerih nadpovprečno zastopani

3 Makedonska pravoslavna cerkev je leta 1959 pridobila avtonomijo v sklopu Srbske pravoslavne cerkve, od katere se je enostransko odcepila leta 1967. Vesoljni patriarh carigradski je leta 2022 priznal obstoj »Ohridske arhiepiskopije«, ne pa tudi avtokefalnosti makedonske pravoslavne cerkve. Istega leta je to storila Srbska pravoslavna cerkev, kot matična cerkev Ohridskemu arhiepiskopatu (Škafar, 2022).

tako Makedonci kot Črnogorci. Za Črnogorce je bilo značilno, da so bili povsod – razen v Sloveniji – močno nadpovprečno zastopani, saj so jih Srbi šteli za svoje najtesnejše zaveznike. Slovenci so bili glede na dejansko zastopanost v prebivalstvu dokaj sorazmerno razporejeni. Nekoliko izstopa Hrvaška, kjer je bil delež Slovencev v odborih nižji kot v splošnem prebivalstvu, kar je problematično spričo dejstva, da so bili Slovenci izven Slovenije najbolj številčno zastopani prav na Hrvaškem. Podobno je bilo s Hrvati v Sloveniji, ki so bili prav tako nekoliko podpovprečno zastopani.

Tedanje jugoslovansko zvezno in republiška politična vodstva so bila pozorna in so delovala usklajeno. Zato so bili Srbi kot relativno najštevilčnejši jugoslovanski narod nadpovprečno prisotni le na območjih, ki so bila v strateško-političnem smislu vitalnega pomena za prostorsko homogenizacijo srbskega prebivalstva kot prvega branika jugoslovanske države. To pa sta bili predvsem Bosna in Hercegovina ter Hrvaška od Podrinja na vzhodu vse do Krajine na zahodu. Vojvodina v tem kontekstu ni bila več tako pomembna, saj so tam Srbi z intenzivnimi povojnimi migracijami že leta 1948 postali večinsko prebivalstvo (50,5 odstotka). Do leta 1961 se je v Vojvodino priselilo kar 374.009 ljudi iz drugih republik brez ožje Srbije, delež Srbov pa je narasel na 54,8 odstotkov. Pri tem so Srbi v Banatu predstavljali skoraj dvotretjinski delež (64,6 odstotka), v Sremu in Bački pa manj od polovičnega (49,5 odstotka) (Savezni zavod za statistiku SFRJ, 1966, str. 342; Savezni zavod za statistiku SFRJ, 1961).

ETNIČNA STRUKTURA POSLOVODSKEGA OSEBJA LETA 1981 KOT POLITIČNO-GEOGRAFSKI DEJAVNIK IN POSLEDICA MIGRACIJ

Od konca 1960-ih let naprej so se z afirmacijo Muslimanov začele razmere zanje zlasti v Bosni in Hercegovini izboljševati. Analizo teh sprememb omogočajo podatki popisa iz leta 1981, saj je mogoče primerjati specifične skupine zaposlenih po etničnosti na ravni republik in na ravni SFRJ. Posebno kategorijo poslovskega (vodstvenega, upravljalnega) osebja sestavljajo tri podkategorije vseh organov z izvršno ali upravno funkcijo:

- člani skupščine družbeno-političnega zbora ter funkcionarji izvršnega organa in organa uprave na stalni dolžnosti;
- poslovodje in organizatorji poslovanja v organizacijah združenega dela in drugih samoupravnih organih in skupnostih;
- poslovodje zbornic, občin združenj, družbeno-političnih in drugih družbenih organizacij na stalni dolžnosti (Savezni zavod za statistiku SFRJ, 1981).

Z metodo lokacijskih kvocientov oziroma indeksov politične zastopanosti (IPZ) smo ugotavljali, kako se je udeležba enakopravnost in proporcionalna zastopanost narodov in narodnosti v omenjenih institucijah na ravni republik in federacije. Rezultate lahko neposredno primerjamo s podatki o zastopstvu v občinskih skupščinah in skupščinah delovnih organizacij v letih 1960 in 1967, ki smo jih prikazali zgoraj.

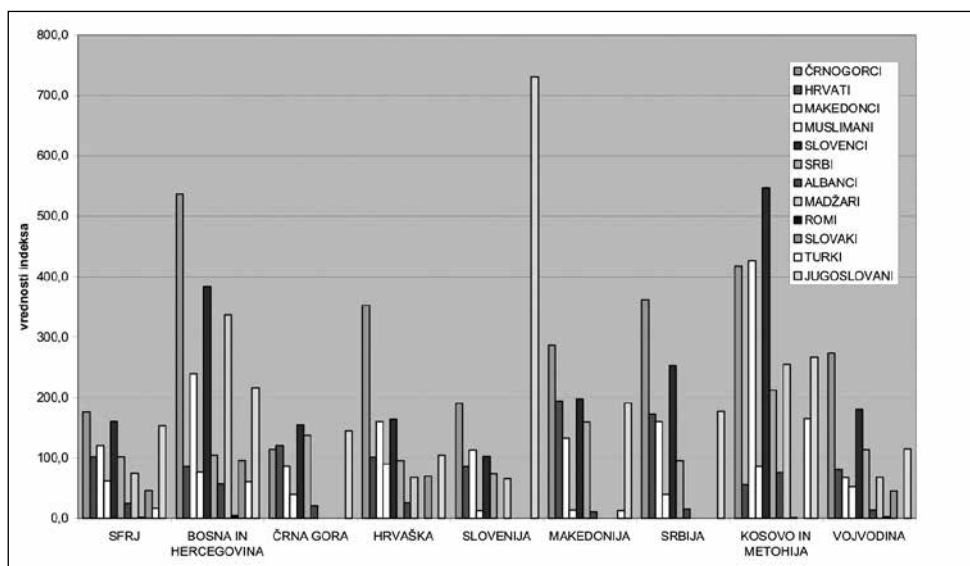
Očitno je prišlo do upoštevanja nekaterih zgoraj predstavljenih primerov srbskega nacionalizma in poskusov hegemonije (Centralni komitet Saveza komunistov Srbije, 1966), saj se je do leta 1981 situacija bistveno spremenila. V federalni perspektivi so bili med državotvornimi narodi politično najbolj izpostavljeni Črnogorci, katerih delež zastopanosti je za dvakrat presegal delež, ki so ga predstavljali v aktivnem kontingentu prebivalstva (IPZ 1981 = 193,9). Nadpovprečno so bili zastopani tudi Slovenci (141,6), kar pa velja zgolj na vsejugoslovanski ravni, medtem ko so bili na republiški (slovenski) ravni zastopani le nekoliko nad povprečjem. Na višino indeksa pri Slovencih je pozitivno vplivala prisotnost žensk v vodstvenih kadrih, ki je bila v primerjavi z drugimi narodi visoko nadpovprečna, ne pa tudi v proporcionalnosti po spolu. Najmanj zastopani med narodi so bili Muslimani (IPZ = 79,1).

Zanimivo je, da so najvišji indeks dosegali kadri judovske (538,2) in ruske (341,5) narodnosti, kar kaže na priliv kadrov in na še vedno močno politično navezanost na Sovjetsko zvezo v tistem obdobju ter na njihovo izpostavljeno vlogo v obdobju NOB, ne pa tudi na neposredno izboljšanje položaja narodnosti. Od številčnejših narodnosti so najnižjo zastopanost glede na velikost aktivnega kontingenta prebivalstva dosegali Romi (le 2,4), Albanci (47,7) in Madžari (71,5). Medtem ko je za Rome značilna slabša socialno-ekonomska struktura in nižja raven povprečne izobrazbe, zaradi česar je bila nizka poslovodska in politična zastopanost pričakovana, je pri Albancih, večinoma na Kosovu, vidna izrazita diskriminacija, kar velja tudi za Madžare, katerih večina je prebivala v Vojvodini. V desetletju in pol se torej niso zmanjšali problemi, ki so jih navajali na 14. seji Zveze komunistov Srbije:

Odprti problemi v uresničevanju politike nacionalne enakopravnosti niso proizvod nekih političnih ekscesov in prodora stihije, ki jih je treba kot ekscese reševati in kot stihijo krotiti. Te probleme je izpostavil predvsem razvoj proizvodnih sil, družbenih odnosov in politično demokratično življenje, zato jih je treba reševati skupaj z ostalimi problemi družbenega življenja, da bi se lahko sprostili in pospešili tokovi socialističnega razvoja in uspešneje udeležala družbena in gospodarska reforma. (Nedeljković, 1968)

Popisni podatki za leto 1981 kažejo, da so se vzorci kadriranja, predvsem političnega, iz preteklih povojnih desetletij v marsikaterem vidiku obdržali. To potrjujejo tudi razmerja na ravni posameznih republik in pokrajin. V Bosni in Hercegovini so bili med konstitutivnimi narodi zopet nadpovprečno zastopani Srbi, vendar ne tako izrazito kot v prvem obdobju po vojni. Tudi v tem obdobju so bili nadpovprečno zastopani Črnogorci – njihov delež zastopanosti je bil kar petkrat višji od splošnega deleža, in sicer so bili nadpovprečno zastopani v vseh republikah. Podobno velja za »politično« kategorijo »Jugoslavlani« (IPZ = 151,7), ki je bila tudi posebna oblika narodnostnega neopredeljevanja zaradi dela v vojaških poklicih in policiji ali članstva v Zvezi komunistov in drugih federalnih organizacijah. Ostali neopredeljeni pa so bili podpovprečno zastopani.

Konstitutivne etnične skupine so bile podobno kot v Bosni in Hercegovini tudi v drugih republikah praviloma močno podpovprečno zastopane. To velja tako za Albance na Kosovu, v Srbiji in Makedoniji kot tudi za Madžare v Vojvodini, na Hrvaškem in v Sloveniji. Med narodi Jugoslavije so bili sistematično v podrejenem položaju Muslimani-Bošnjaki. Določene vzporednice z njimi je opaziti tudi pri Hrvatih, pri čemer pa so slednji v zadnjem desetletju pred popisom na Hrvaškem uspeli doseči uravnoteženost s Srbi, na vseh ostalih območjih, kjer so predstavljali konstitutivni narod ali skupino (Bosna in Hercegovina, Vojvodina, Kosovo), pa so ostali podpovprečno zastopani. Izjema je bila Črna gora, kjer pa se velik del Hrvatov ni etnično opredelil. Za primerjavo navedimo, da je bilo v Črni gori v tem obdobju okrog 30.000 katolikov (popis iz leta 1991 jih našteva okrog 27 tisoč), število Hrvatov pa je z nekaj nad 10 tisoč leta 1961 upadlo na okrog 7 tisoč leta 1991 (Savezni zavod za statistiku SFRJ, 1961; 1981; 1991).



Slika 1: Indeks politične zastopanosti (IPZ) po etničnosti v republikah SFRJ (vir: Savezni zavod za statistiku SFRJ, 1981, preglednica 075., SZS; lastni izračuni).

Tudi za pravoslavne Makedonce je bila v splošnem značilna relativno nadpovprečna zastopanost po enotah nekdanje SFRJ, razen v Črni Gori in Vojvodini. Srbi so ostali nadpovprečno zastopani na vseh tistih območjih, ki so bila strateškega pomena za homogenizacijo srbskega etničnega ozemlja. Poleg Bosne in Hercegovine sta to bila še Kosovo in Vojvodina ter Hrvaška, deloma pa tudi Makedonija in Črna Gora. Taka politika je predstavlja zasuk od prejšnje prakse, vidne v 1960-ih letih, saj so bili Srbi enako kot drugi narodi podpovprečno zastopani na matičnem ozemlju, ki pa zanje ni bil ogroženo. S tem je bil ohranjen lep obraz navideznega upoštevanja enakopravnosti narodov in narodnosti Jugoslavije. Poleg tega so najtesnejši srbski

zavezniki, Črnogorci in Makedonci (izven Slovenije pa tudi Slovenci), obvladovali preostanek Jugoslavije, tako da so bili skupaj povsod vedno daleč nadpovprečno zastopani. Vloga Slovencev je bila ambivalentna. Kot večinoma detaširani kadri so zasedali pomembne pozicije in so bili močno nadpovprečno zastopani v organih drugih republik. Indeks njihove zastopanosti je naraščal z odmikanjem od Slovenije, kjer so Slovenci komaj ujeli povprečje. Podoben položaj so si sčasoma izborili Hrvati na Hrvaškem, ki so bili vse do popisa leta 1981 tam v podrejenem položaju, obenem pa so bili Srbi sorazmerno nadpovprečno zastopani (Slika 1). Zaradi močne srbske manjšine je bila Hrvaška strateško preveč pomembna za Srbijo in Jugoslavijo ter za srbsko vprašanje, da bi vladajoča zvezna politika kadre kar tako prepuščala drugim. To se je pokazalo v dogodkih po hrvaški pomladi (Maspok) na začetku 1970-ih let, ko je prišlo do obračuna z vrhovi tedanje hrvaške politike, ki so jih zamenjali »sivi aparatčiki večinoma srbske narodnosti« (Pirjevec, 1995, str. 305).

SPREMEMBE ETNIČNE STRUKTURE V SFRJ IN KONTEKST POLITIČNE IN DRUŽBENE PREVLADE SRBOV IN ČRNOGORCEV

Če želimo razumeti kontekst politične in družbene prevlade zlasti Srbov in Črnogorcev, je treba najprej ugotoviti, da se je z upadanjem deleža Srbov povečala potreba po političnih zavezništvih. »Kdo bi lahko bil najprimernejši, če ne Črnogorci, ki tradicionalno veljajo za najtesnejše zaveznike Srbov, pravzaprav veljajo za Srbe same« (Glomazić, 1988, str. 48). Popisni podatki, ki po etničnem ključu obravnavajo zaposlitveno in poklicno strukturo, že za leto 1948, še posebej pa za leto 1953, kažejo nadpovprečno zastopanost Črnogorcev v poslovnih organih in poklicih glede na njihov skupni delež po vseh republikah SFRJ. Že po popisu iz leta 1953 vidimo, da se je porazdelitev po republikah relativno najbolj povečala pri Črnogorcih (Savezni zavod za statistiko SFRJ, 1948; 1953). V obdobju do leta 1953 je enako, sicer v manjši meri, veljalo tudi za Srbe. Bošnjaki-Muslimani predstavljajo drugo skrajnost, in sicer jih je bilo v organih upravljanja in v poslovnih poklicih nasploh zastopanih nesorazmerno malo glede na njihov splošni delež (Savezni zavod za statistiko SFRJ, 1948; 1953). Centralni komite Zveze komunistov Srbije je priznaval, a začasno dopuščal določene ekscese, ki so vodili h končni politični prevladi vendar pa je v svojih vrstah doživljal tudi nasprotno kritiko, zlasti s strani Dobrice Ćosića, ki je nasprotoval poenotenju in navidezni politični korektnosti: »V take življenjske in časovne imperativne spada vsekakor tudi nacionalna problematika jugoslovanske skupnosti in politika Zveze komunistov na tem področju. Pri tej problematiki je med nami komunisti spekter razlik v razumevanju skoraj v vsemu antinomičen« (Nedeljković, 1968, str. 101). To kaže na jasno izraženo željo po nadaljevanju, in ne opuščanju ali preprečevanju prevlade Srbov v SFRJ, napovedovalo pa je tudi zlovešči razvoj dogodkov, ki je pripeljal do vrhunca z drugim memorandumom SANU in afirmacijo velikosrbske ideologije. Ta ni povzročila le vojne v Jugoslaviji in številnih zločinov v njenem imenu,

temveč je bila tudi povod za razpad jugoslovanske federacije (Budding, 2002). Šele z razpadom SFRJ so na dan privrele številne informacije o geopolitičnih težnjah Srbije tudi v času SFRJ, ki pa so večinoma izhajale iz časov teritorialnega širjenja Kraljevine Srbije, kot sta denimo Garašaninova *Načertanije* iz 1844 in Moljevičev načrt etnične čistke Arnavtov iz Srbije (Čubrilović, 1991; Živić, 1997).

Za razumevanje favoriziranja Črnogorcev s strani Srbov sta zlasti pomembni dve značilnosti Črnogorcev. Prva je ta, da sta bili novoveški kraljevini (državi) Srbija in Črna Gora zgodovinsko povezani in izraziti zaveznici, saj sta pripadali istemu pravoslavnemu verskemu krogu, celo isti Srbski pravoslavni cerkvi kot ostanku Peškega patriarhata (srb. *Pečka patrijaršija*), ki je bil reformiran v 17. stoletju pod Osmanskim imperijem. Črnogorcem ni pripadala niti verska avtonomija, kakor kasneje Makedoncem. Kljub naporom v obdobju po razpadu SFRJ avtokefalnost črnogorske cerkve še vedno ni priznana (Brković, 1995).

Korenine vključitve večjega dela današnje Črne gore v pravoslavje segajo v 11. stoletje in bizantinsko obdobje, ko je bila gorata Duklja ena od bizantinskih tem. Po veliki shizmi leta 1054 je današnja črnogorska obala z delom zaledja (do Bjelopavličev) pripadla zahodnemu (rimsko-katoliškemu) verskemu krogu, gorata notranjost pa vzhodnemu (grško-pravoslavnemu). Kot ostanek beneško-bizantinskega antagonizma se je ta verska dvojnost ohranila, pod vplivom turške invazije pa se je na severu in vzhodu obogatila še z islamom, kar jo v verskem smislu pravzaprav dela tripartitno, podobno kot Bosno in Hercegovino.

Z zgodovinske perspektive je imelo srbsko pravoslavje kasneje izreden vpliv. Celo Petar Petrović Njegoš je v svojih spisih pisal o Črnogorcih, ki govorijo srbsko in so s Srbi pravzaprav eno in isto. O črnogorskem jeziku, ki se je po nastanku državne zveze med Srbijo in Črno Goro vse bolj uveljavljal, pa se jezikoslovci bolj ali manj strinjajo, da je bistveno bolj podoben hrvaškemu ijekavsko-štokavskemu standardu kot pa srbskemu, čeprav ima v primerjavi s hrvaščino nekaj svojskih regionalnih potez (Nikčević, 1994). Tudi številne etnološke značilnosti Srbe in Črnogorce močno razdvajajo (Kulišić, 1980). Po drugi strani je bila geopolitična stvarnost, da je bila Črna gora zaradi dostopa do morja za Srbijo izrazito pomembna, hkrati pa je bila površinsko in prebivalstveno mnogo šibkejša od velike sosedice ter od nje v gospodarskem smislu zlasti v jugoslovanskem obdobju tudi dokaj odvisna. Tako se je s favoriziranjem Črnogorcev dajalo vtis spoštovanja načel bratstva in enotnosti, hkrati pa so Srbi s tem ohranili zvestega in tihega zgodovinskega prijatelja ter ga naredili še bolj odvisnega od njih (Pirjevec, 2003, str. 22).

SPREMINJANJE ETNIČNE STRUKTURE V BOSNI IN HERCEGOVINI V HISTORIČNO-GEOGRAFSKI PERSPEKTIVI IN NJENE REGIONALNE SPECIFIKE

Družbeno-gospodarski položaj Muslimanov v Bosni in Hercegovini v času pred avstro-ogrsko zasedbo je bil zelo ugoden. Iz časov po padcu Bosne leta 1463 in Hercegovine leta 1482 pod Turke (Majciger idr., 1871, str. 274) se je večina plemstva spreobrnila v islam, da bi ohranila svoje posesti. Po prehodu v islam so muslimani obdržali večji del fevdalnih privilegijev in plemiški status (begi in age), številčnejši preostanek pa so tvorili posestniki (spahije) ter obrtniki in trgovci po mestih in trgih, le malo pa se jih je ukvarjalo s poljedelstvom, pa še to samo v rodovitnejših krajih. Še do avstro-ogrske zasedbe so muslimani oz. »mahomedanci« (Majciger idr., 1871, str. 211) obdržali praktično vso zemljo v svoji lasti, obdelovala pa jo je krščanska, pretežno katoliška brezpravna »raja« (Majciger idr., 1871, str. 211). Lahko si le predstavljamo, kako se je poslabšal socio-ekonomski položaj muslimanskega prebivalstva po zasedbi s strani Avstro-Ogrske in kasneje po vključitvi v jugoslovanske države (Dugački, 1942, str. 629).

Glede kristjanov v Bosni in Hercegovini so si podatki iz 19. stoletja dokaj nasprotujoči, saj je bilo število kristjanov v turškem času podcenjeno. Posebej nepriljubljeni pri turških oblasteh in od Turkov zatirani so bili katoličani, predvsem zaradi močne frančiškanske mreže, ki si je vseskozi prizadevala graditi nove cerkve ter samostane in je bila nasploh v verskem smislu najbolj organizirana (Majciger idr., 1871, str. 209). Močno oporo so imeli katoličani Bosne in Hercegovine predvsem v Avstro-Ogrski ter v drugih močnih evropskih katoliških deželah. Zelo zanesljivo statistiko katolikov bosenskega ejaleta so vodili bosenski vikarji. Podatke o katoliki v Bosni in Hercegovini je po Horvatu povzel Dugački. Tako so jih leta 1840 našteji 128.489, leta 1877 pa že 208.317 (Dugački, 1942, str. 628). Dugački je na podlagi primerjav popisnih podatkov za leti 1879 in 1931 ugotovil, da je najhitreje naraščalo število katoličanov, najbolj na račun »silnega naravnega prirastka katoliških Hrvatov, ki so porasli za 146,9 odstotkov, deloma pa tudi zaradi priseljevanja tujcev katoliške vere« (Dugački, 1942, str. 629). Po avstro-ogrski okupaciji so se v nižinske predele severne Bosne začeli priseljevati Nemci, Ukrajinci, Poljaki, Italijani in druge narodnosti nekdanje Avstro-Ogrske (Dugački, 1942, str. 629).

Po drugi strani so imeli zaradi pretežno urbanega značaja poselitve muslimani bistveno nižji naravni prirastek. Poleg težke socialnoekonomske situacije, ki jih je prizadela po avstro-ogrski okupaciji, se je v obdobju 1883–1914 del muslimanskega prebivalstva (okrog 64.000) tudi izselil, tako da je njihov prirastek znašal 60 odstotkov (Dugački, 1942, str. 629–630). Pravoslavci so se po prirastku 106,7 odstotkov v tem obdobju znašli nekje vmes. V desetletju pred popisom leta 1931 je potekalo močno priseljevanje srbskih prostovoljcev v Posavino. Glede na rast posamezne veroizpovedi smo opredelili njihovo število leta 1931. Število katolikov je naraslo na 553.400, pravoslavcev na 1.026.900, muslimanov pa na 716.800. Iz prikazanega

lahko ugotovimo razmerja po veroizpovedi v letu 1931. Delež muslimanov je z 38,7 odstotkov padel na 31 odstotkov, delež katolikov se je vzpel z 18,1 odstotkov na 23,9 odstotkov, delež pravoslavcev pa z 42,9 odstotkov na 44,3 odstotkov (Dugački, 1942, str. 629–630).

Nekako v tem razmerju se je obdržala verska struktura tudi do popisa leta 1948. Takrat je popis sicer potekal po metodi rojstnega kraja, vendar nam lahko kljub temu služi kot dobra primerjava odnosov med posameznimi etničnimi skupinami. Popis leta 1948 je bil prvi, v katerem je bila popisana etnična pripadnost. Tako so bili muslimani šteti kot narodnostno neopredeljeni, katoliki so se pretežno opredelili kot Hrvati, pravoslavci pa kot Srbi. To je razvidno iz naslednjih podatkov: od skupno 2.713.013 prebivalcev, rojenih v Bosni in Hercegovini, je bilo kot Hrvatov opredeljenih 645.548 (23,8 odstotka), kot Srbov 1.256.953 (46,3 odstotka), kot muslimanov-neopredeljenih pa 786.739 (29 odstotkov) prebivalcev (Savezni zavod za statistiku SFRJ, 1954).

Razmerje med tremi največjimi etnijami se je spremenilo v korist Srbov, ki so se po deležu približali polovici, kljub temu, da je v javnem mnenju prevladovalo prepričanje o ogromnih izgubah Srbov v času druge svetovne vojne. Seveda je pri tem treba upoštevati tudi povojni obračun s pripadniki oboroženih sil NDH. Porast deleža Srbov gre tako pripisati že omenjenim priselitvam, pa tudi dejstvu, da se je del muslimanov (v verskem smislu) opredelil v etničnem smislu kot Srbi (okrog 70.000). Ob navedenem je vojna sodeč po podatkih dokaj enakomerno prizadela prebivalstvo. Nespremenjen je bil namreč delež Hrvatov, čeprav je bilo znano, da so imeli katoliki v Bosni in Hercegovini najvišjo rodnost, in to s stopnjami, ki so rast muslimanov prese-gale skoraj za trikrat, rast pravoslavcev pa za 1,5-krat (prim. Dugački, 1942, str. 629). Če bi se trendi, zabeleženi do popisa leta 1931, nadaljevali, bi etnično-verska slika Bosne in Hercegovine leta 1948 izgledala takole: 27,5 odstotkov katolikov (Hrvatov), 44,8 odstotkov pravoslavcev (Srbov) in 27,7 odstotkov muslimanov (Bošnjakov). Izhodiščno povojno stanje kaže na številčni primat Srbov, ki pa se jim je postopoma izmikal v korist Muslimanov-Bošnjakov. V segmentu prikazane politične in družbene zastopanosti je jasno razvidno, kako močne posledice je imel tak razvoj na politične odločitve, ki so sledile.

RAZUMEVANJE SELITVENIH SPECIFIK POSAMEZNIH NARODOV NEKDANJE SFRJ IN NAČRTNE (PLANSKE) MIGRACIJE

V Vojvodini kot tipičnem območju plansko-političnih in etničnih selitev je potekala sistematična večstoletna kolonizacija vse do prvih nekaj let po drugi svetovni vojni. Prebivalci so se priseljevali iz hribovitih predelov nekdanje Jugoslavije, iz madžarskega in avstro-nemškega Podonavja, iz karpatskega območja, pa tudi od drugod. Zadnja večja kolonizacija je bila izpeljana po drugi svetovni vojni, ko se je na posesti izseljenih Nemcev naselilo okrog četrto milijona prebivalcev, pretežno pravoslavni,

z območja kraških dinarskih planot v notranjosti (Bertić & Rogić, 1987, str. 98; Josipovič, 2012). Za to nalogo so bili primerni zlasti bosenski in krajinski Srbi (Prečani). Geostrateški premislek je narekoval potrebo po etnični rezervaciji neposrednega zaledja jugoslovanskega in srbskega glavnega mesta (Srem, Banat, Bačka) (Pavić, 1991). Po drugi strani smo videli, da je kljub domnevnim enormnim vojnim izgubam prišlo do nepričakovanega presežka Srbov v Bosni in Hercegovini in da jih je bilo smiselno deloma preseliti v krizna območja, saj je bil delež Muslimanov in Hrvatov bistveno nižji od deleža Srbov. Na ta način Srbi ne bi izgubili dominantne vloge v Bosni in Hercegovini, hkrati pa bi povečali svoj delež v strateško pomembni Vojvodini. Del načrtov se je uresničil, na območjih izseljevanja pa je to povzročilo efekt migracijske verige, ki ga je bilo težje nadzorovati kot sprožiti. Ker so bili Muslimani v prvem obdobju po drugi svetovni vojni najmanj migracijsko mobilni med narodi Bosne in Hercegovine, se je njihov delež relativno povečeval, delež Hrvatov in Srbov pa se je na račun emigracije zmanjševal. Posledica tega je bilo postopno spreminjanje etnične slike posameznih predelov Bosne in Hercegovine. Zavedajoč se nevarnosti, da lahko Muslimani postanejo lokalna večina v občinah z dokaj izenačeno etnično sestavo, je bilo treba ustvariti pogoje tudi za začetek postopnega izseljevanja Muslimanov. Zato ni nepričakovano, da so se ti začeli izseljevati ravno z območij, kjer so Srbi izgubljali večino, nižal pa se je tudi delež Hrvatov (Sanski Most, Prijedor, Ključ itd.).

Veliki zaposlitveni centri, ki so deloma v 1960-ih, predvsem pa v 1970-ih letih zrasli na območju Slovenije v procesu industrializacije, mnogokrat tam, kjer jih glede na regionalnogeografske razmere ne bi pričakovali (npr. železarna na Jesenici), so pomenili potencialna zaposlitvena središča za priseljeno prebivalstvo. In če so se Srbi poklicno ukvarjali s celo paleto dejavnosti, je bila za Muslimane značilna precej monostrukturna poklicna pa tudi izobrazbena usmerjenost. Ta je odražala neenake možnosti izobraževanja in zaposlovanja v izvornih območjih, hkrati pa tudi na tamkajšnje zaposlitvene razmere. Če se je s hitro industrializacijo v 1970-ih letih povečevalo število delovnih mest, je presenetljivo, da jih v sami Bosni in Hercegovini, ki se je intenzivno industrializirala (med republikami je imela v sedemdesetih letih največ težke industrije v SFRJ) niso zapolnili Muslimani (Marić, 1991, str. 109).

V Sloveniji bivajoči Bošnjaki so v anketi navajali, da so se za Slovenijo odločili na nagovor podjetij iz Slovenije in tamkaj zaposlenih Bošnjakov, ki so prihajali v Bosno in jih še kot šolarje ali dijakke prepričevali za selitev. Migranti naj bi bili v povprečju celo bistveno mlajši od vrednosti, ki jih je beležila uradna statistika (Dolenc, 2003, str. 76–8). Če so bili migranti v resnici tako mladi (med 15 in 20 let), se velja vprašati, kakšni so bili pogoji za šolanje v izvornem območju in perspektive ter okoliščine, da so jih v tako velikem številu uspeli pridobiti za preselitev, sploh mladoletne. S kartografsko metodo smo potrdili, da so bila glavna izselitvena območja v Bosni in Hercegovini tista, kjer so imeli Srbi zgolj še relativno večino oziroma so slednjo izgubili na račun Muslimanov (Preglednice 2–4).

	1971	1971	1981	1981	1991	1991
	absolutno	relativno	absolutno	relativno	absolutno	relativno
Hrvati	15	6	14	8	14	6
Muslimani	36	8	36	11	38	14
Srbi	33	9	32	8	32	5
Skupaj občin	84	23	82	27	84	25
	(%)	(%)	(%)	(%)	(%)	(%)
Hrvati	71,4	29,6	63,6	36,4	70,0	30,0
Muslimani	81,8	18,2	76,6	23,4	73,1	26,9
Srbi	78,6	21,4	80,0	20,0	86,5	13,5

Preglednica 2: Število občin glede na absolutno ali relativno etnično večino v obdobju 1971–1991 v Bosni in Hercegovini (vir: Savezni zavod za statistiku SFRJ, 1971; 1981; 1991; lastni izračuni)

razmerje 71/91	Izboljšanje	Poslabšanje	Število občin	(%)	(%)	(%)
Hrvati : Muslimani	16	91	107	15,0	85,0	100
Hrvati : Srbi	44	63	107	41,1	58,9	100
Srbi : Muslimani	92	15	107	86,0	14,0	100

Preglednica 3: Spremembe medetničnih razmerij v obdobju 1971–1991 v Bosni in Hercegovini (vir: Savezni zavod za statistiku SFRJ, 1971; 1981; 1991; lastni izračuni)

	1971 (%)	1981 (%)	1991 (%)	1971 (%)	1981 (%)	1991 (%)
Hrvati	20,5	18,1	17,4	21,0	20,1	18,9
Muslimani	39,7	39,7	43,4	40,8	44,1	47,1
Srbi	37,2	32,1	31,2	38,2	35,7	33,9
Skupaj	97,4	89,9	92,1	100,0	100,0	100,0

Preglednica 4: Razmerja med konstitutivnimi narodi v Bosni in Hercegovini v obdobju 1971–1991 (Savezni zavod za statistiku SFRJ, 1971; 1981; 1991; lastni izračuni)

Nadaljnji pokazatelj politične pogojenosti izseljevanja iz Bosne in Hercegovine ter posledično priseljevanja v Slovenijo je delež priseljenih iz Bosne in Hercegovine v druge republike. Iz teh podatkov vidimo, da je Slovenija postala zanimivejša šele v drugi polovici 1970-ih let, medtem ko za Muslime ciljnega območja ne predstavlja nobena druga republika razen Slovenije in Hrvaške. V določeni meri je izjema zdomstvo in izseljevanje v tujino, ki pa je pri Muslimanih ravno tako pozno in najmanj obsežno, predvsem v primerjavi s Hrvati, pa tudi s Srbi (Grečić, 1975, str. 228). To potrjujejo tudi podatki o deležu in številu Muslimanov v drugih republikah. Njihov delež se je v Srbiji relativno vseskozi zmanjševal (Petrović, 1987, str. 101), druge republike pa zanje niti niso bile privlačne. Vse to kaže na jasno politično

funkcijo izseljevanja tudi v Slovenijo, ki je s tem tudi sama šla skozi proces spreminjanja povojne monoetnične strukture prebivalstva, zlasti osrednjega dela, v smeri jugoslavizacije, čeprav bi lahko manjkajočo delovno silo zaradi industrializacije pridobila iz vzhodnega dela republike, a se je ta izgubila v zdomstvu. Tudi zato imigracije v Slovenijo ne moremo enoznačno označevati kot ekonomsko, saj si večina, predvsem Muslimanov, življenjske ravni sploh ni izboljšala, temveč je padla v še slabši ekonomski položaj (Mežnarič, 1986, str. 101).

ZGODOVINSKA POGOJENOST MIGRACIJ BOSENSKO-HERCEGOVSKIH SRBOV KOT MIGRACIJSKO INSTRUMENTALIZIRANE ETNIČNE SKUPNOSTI

Prebivalstvo Bosne in Hercegovine in tudi Like ter Hrvaške Krajine v konstitutivni meri predstavlja nasledek nekdanjega zahodnovlaškega dinarskega prostora. V njem dominira prebivalstvo ijekavsko-štokavskega govora (Lisac, 1996; Crnić Novosel, 2019). Spričo pripadnosti Srbski pravoslavni cerkvi je, razen v Črni Gori, to nekdanje pretežno vlaško prebivalstvo v procesu modernega formiranja narodov 19. stoletja šele v 1870-ih optiralo za etnično srbstvo (Petrović, 1968, str. 252), medtem ko je manjši del vlaškega prebivalstva zaradi katoliške verske pripadnosti optiral za hrvaštvo (Mužić, 2001). Značilnosti poselitve Vlahov, ki so pogosto živeli v težko dostopnih in nepriljudnih predelih visokih kraških planot, izvirajo še iz časov, ko je to območje okupiral in osvojil Osmanski imperij (Pavičić, 2000). Turki so namreč na območje, ki ga je takrat izpraznilo katoliško prebivalstvo, ko je prebegnilo na območje pod avstrijsko in ogrsko-hrvaško oblastjo (ostanki Hrvaške in Slavonije, Dalmacija, Kranjska, Štajerska, Goriška, Istra, Gradišćanska, Ogrska, Slovaška, Moravska itd.), poleg preostanka prebivalstva, ki se je islamiziralo ali prestopilo v pravoslavje, naseljevali slovanizirano vlaško prebivalstvo z območja Starega Vlahi, kar ustreza območju današnjega Sandžaka, stare Hercegovine in osrednje Albanije (Pavičić, 2000). Tamkajšnji staroselski Vlahi so romanizirano govorico zadržali najpозnejše do 13. stoletja, sledi pa so ostale zlasti v onomastiki (Lisac, 1996; Grafenauer, 1991). Od 15. stoletja dalje so Vlahi predstavljali temeljni kolonizacijski element na območju Hrvaške pod turško zasedbo. Vlahi kot nomadsko ljudstvo so poseljevali sicer redko naseljeno območje, ki so ga v zameno za sodelovanje v vojaških operacijah Turkov dobili v uporabo (Pavičić, 2000; Kaser, 1997, str. 63). V obdobju turške okupacije širšega bosenskega in hercegovskega teritorija se je vzpostavil plačniško-najemniški vojaški sistem, v katerem so se Vlahi znašli v navidezno paradoksnih situaciji. Na eni strani se je oblikovala Bosenska krajina s pravoslavnimi Vlahi v službi Turčije, na drugi strani pa se je na območju ostanka Hrvaške oblikovala Vojna krajina, ki je bila povečini namensko naseljena s pravoslavnimi Vlahi v vojaški službi Avstrije (Voje, 1994, str. 228–229, 268; Fister, 1975, str. 16). Za veliko večino »turških« vpadov in roparskih pohodov je bila odgovorna domača bosenska vojska, predvsem pa pravoslavni Vlahi kot akindžije (lahka konjenica) in martolozi (oboroženi, pretežno

pravoslavni ubežniki izpod turške oblasti), redna turška vojska pa le za manjši del, in to v glavnem v primerih osvajalskih vojnih pohodov (Hladnik, 1997; Simoniti, 1977). Ta tradicija Vlahov, današnjih bosenskih in krajinskih Srbov, je v veliki meri izhajala iz nomadsko-klanske ureditve vlaške družbe na tem območju, ki je temeljila na »zadrugi« več družin. Te zadruge so se marsikje obdržale do danes (Kaser & Brückmüller, 1989; Kaser, 1997, str. 134). Tudi transhumanca (polnomadska sezonska selitev čred) iz visokih bosenskih kraških planot v Panonsko in Padsko nižino na severu in severozahodu je eden tipičnih ostankov nomadskega življenja Vlahov (Friganović, 1978, str. 142). Posledica vsega omenjenega je bila izrazita migracijska mobilnost, še posebej bosenskih Srbov, kar lahko potrdimo s podatki o migracijah tega prebivalstva po drugi svetovni vojni v obdobju 1945–1981. Do leta 1945 jih je Bosno in Hercegovino zapustilo 24.179, od tega jih je polovica oziroma 12.632 odšlo v Vojvodino. V obdobju 1945–1960 jih je bilo izseljenih 71.371, od tega 63.000 v Srbijo oziroma 41.022 ali 57 odstotkov samo v Vojvodino (Preglednica 5).

		Izseljeni v				Deleži (%) izseljenih v			
		Vojvodino	ožjo Srbijo	Hrvaško	Slovenijo	Vojvodino	ožjo Srbijo	Hrvaško	Slovenijo
Skupaj izseljenih	266.625	121.728	82.646	46.853	11.368	45,66	31,00	17,57	4,26
pred 1945	24.179	12.632	9357	1635	41	52,24	38,70	6,76	0,17
1945–1960	71.371	41.022	20.666	8211	626	57,48	28,96	11,50	0,88
1961–1970	81.537	35.877	25.289	17.128	2069	44,00	31,02	21,01	2,54
1971–1981	80.293	27.757	25.125	18.167	7913	34,57	31,29	22,63	9,86
neznano	9245	4440	2209	1712	719	48,03	23,89	18,52	7,78

Preglednica 5: Izseljeni Srbi iz Bosne in Hercegovine glede na čas in regijo izselitve (vir: Savezni zavod za statistiku SFRJ, 1981; lastni preračuni)

Zato tudi priseljevanja Srbov iz Bosne in Hercegovine v Slovenijo ne moremo obravnavati ločeno od njihovih siceršnjih preseljevanj. Od celotne emigracije bosenskih Srbov se je le manjši del usmeril proti Sloveniji, pri čemer se je tok proti Sloveniji okrepil šele v 1970-ih letih, kar je mnogo kasneje od povojne migracije Srbov iz Bosenske in Hrvaške krajine ter vzhodne Hercegovine kot gospodarsko pasivnih krajev. Bosenski Srbi, ki so se preselili v Slovenijo, so predstavljali 23,9 odstotkov (16.800) od vseh 70.293 prebivalcev Bosne in Hercegovine, preseljenih v Slovenijo (Savezni zavod za statistiko SFRJ, 1981; Petrovič, 1987, str. 96–100). Srbi iz drugih republik, razen dela Srbov iz Hrvaške, pa za Slovenijo številčno niso bili tako pomembni, kot je bil pomemben družbeno-gospodarski sektor njihovega udejstvovanja. Muslimani so se pričeli izseljevati iz BiH, največ na Hrvaško in Slovenijo (po 6000), šele v 1970-ih letih.

ZAKLJUČEK

Po koncu druge svetovne vojne in konsolidaciji jugoslovanskega teritorija z novimi ozemeljskimi pridobitvami zmagovalne strani v vojni in s tem veliko razširitvijo ter pomikom nekdanje rapalske meje globoko na zahod je povojna socialistična Jugoslavija postopoma pridobila 7.138 km² novega ozemlja, s čimer se je samo Slovenija povečala za tretjino predvojne površine. Pridobitve pa so obsegale večji del Istre ter kvarnerskih in dalmatinskih otokov in večji del Primorske kot nekdanje cone A do Soče do leta 1946, do reke Idrije in mejnih grebenov Julijskih Alp ter del Krasa do leta 1947, ter območja cone B in delčka cone A STO do leta 1955. Končno se je leta 1956 ustalila tudi medrepubliška meja med Slovenijo in Hrvaško, tako da lahko od tedaj naprej podrobno spremljamo smeri selitev jugoslovanskega prebivalstva med posameznimi republikami in avtonomnimi pokrajinami. Čeprav so imele te migracije značaj notranjih selitev, jih je bilo mogoče šteti tudi kot medetnične, še posebej zato, ker so imeli v večini republik in pokrajin posamezni narodi izrazito etnično večino. To velja predvsem za Slovenijo, Hrvaško, Črno goro, ožjo Srbijo in Makedonijo, manj pa za Bosno in Hercegovino, Vojvodino in v prvi povojni fazi tudi še Kosovo. Proti koncu obstoja Jugoslavije, z naraščajočo krizo vladanja in ekonomske politike, finančnimi pritiski Mednarodnega denarnega sklada ter porastom nacionalizmov, so se migracijski tokovi federacije izrazito usmerili v območje etnično večinske republike, pri čemer je edina republika brez prevladujoče etnične pripadnosti ostala le še Bosna in Hercegovina. Tako lahko v času obstoja SFRJ (1945–1991) ločimo tri različna migracijska obdobja: a) obdobje panjugoslovanske konsolidacije (1945–1956) in utrditve razmejitve med republikami ter afirmacije petih etničnih pripadnosti kot nosilnih jugoslovanskih konstitutivnih narodov, večinsko zastopanih v matični republiki (poleg Srbov, Hrvatov in Slovencev še na avnojskih sklepih temelječih priznanj Črnogorcev in Makedoncev). Za to obdobje so značilne zlasti selitve »Krajišnikov«, krajinskih Srbov, iz Hrvaške in Bosenske krajine v Vojvodino za konsolidacijo srbske etnične večine po kolektivnem izgonu Nemcev; b) obdobje vsejugoslovanskega entuziazma in izrazito živahnih notranjih migracij med republikami (1956–1974) stran od matičnih etničnih skupnosti, ki sta ga zaznamovala upad deležev matičnih narodov v republikah in postopna destabilizacija manjšinskih območij visoke rodnosti (Kosovo). Za to obdobje so značilne izgradnja države in socialistična industrializacija ter urbanizacija, katere posledica je bila obsežna deagrarizacija in naraščanje etnične raznolikosti jugoslovanskih mest; ter c) obdobje supranacionalne dezintegracije (1974–1991), za katero je značilna specifična migracijska dinamika povratnih migracij ali migracij potomcev nekdanjih preseljencev v republike etničnega središča. Za to obdobje je hkrati značilen visok delež heteroetničnih porok in porast nadnacionalnih jugoslovanskih opredelitev, ki so se ohranile vse do leta 1991. Vsako od treh obdobji je zaznamovala prevlada določenega migracijskega tipa, v vseh treh pa se je vzpostavil poseben tip psevdoprostovoljnih migracij, ki prikriva dejanske razmere soustvarjanih okoliščin zaželene preselitve specifične etnične populacije. Tako je

zlasti v Bosni in Hercegovini kot republiki brez izrazite etnične večine prihajalo do notranje konsolidacije nekdanj etnično pestrih okrajev in podregij, iz katerih se je postopoma izseljevalo lokalno manjšinsko prebivalstvo. Specifičen položaj je bil v Vojvodini in na Kosovu kot dveh avtonomnih pokrajinah v okviru republike Srbije, kjer pa sta potekala nasprotujoča si procesa: na eni strani v Vojvodini čedalje intenzivnejša prevlada Srbov kljub zelo številčni manjšinski populaciji, na drugi strani na Kosovu proces stalnega izseljevanja zlasti Srbov in Črnogorcev ter utrjevanje večine kosovskih Albancev. Slovenija je bila tako ob razpadu SFRJ edina republika brez izrazito številčne posamične manjšine. Hrvaška in ožja Srbija sta imeli kljub izraziti večini matičnih narodov večja homogena območja druge najštevilčnejše narodnosti (Srbi v Krajini oziroma Muslimani v Sandžaku). V Črni gori so še vedno močno prevladovali Črnogorci, ob tem pa so bile regionalno prisotne različne manjšine (Muslimani Sandžaka, Albanci jugovzhodnega Primorja in Hrvati Boke Kotorske). Makedonija je kljub dvotretjinski večini Makedoncev postajala izraziteje dvonacionalna država z naraščajočim deležem Albancev (četrtnina prebivalstva ob razpadu Jugoslavije).

ZAHVALE IN DRUGI PODATKI

Članek je rezultat raziskovalnega programa »Manjšinske in etnične študije ter slovensko narodno vprašanje« (P5-0081), projekta »Ugotavljanje etnične vitalnosti na obmejnem območju ob slovensko-hrvaški meji: izbrani poselitveni prostori manjšinskih populacij« (J5-3118) ter slovensko-hrvaškega bilateralnega projekta »Etnične manjšine v slovensko-hrvaškem obmejnem prostoru« (BI-HR/23-24-050), ki jih financira Javna agencija za znanstvenoraziskovalno in inovacijsko dejavnost Republike Slovenije (ARIS).

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SUMMARY

POLITICAL-GEOGRAPHICAL FACTORS OF SELECTIVITY OF INTERNAL (INTER-REPUBLIC) MIGRATIONS IN THE SOCIALIST FEDERAL REPUBLIC OF YUGOSLAVIA (1945–1991) AS AN EXAMPLE OF PSEUDO-VOLUNTARY MIGRATIONS, WITH AN EMPHASIS ON BOSNIA AND HERZEGOVINA

Damir Josipović

After World War II, when Yugoslavia consolidated its territory with new acquisitions totaling 7,138 km² and the Rapallo border was abolished, Slovenia alone expanded by one-third compared to its pre-war area. The territorial gains included most of Istria, the Kvarner and Dalmatian islands, and most of the Primorska region: until 1946, up to the Soča River (as part of former zone A); until 1947, extending further to the Idrija River, the border ridges of the Julian Alps, and parts of the Karst; and finally, until 1955, zone B and a part of zone A of the Free Territory of Trieste (FTT). The 1956 settlement finally confirmed the inter-republic border between Slovenia and Croatia. Vivid inner migrations were to a greater extent inter-ethnic, as most of the republics and provinces had a distinct ethnic majority (Slovenia, Croatia, Montenegro, Serbia proper, Macedonia), but less so Bosnia and Herzegovina, Vojvodina, and Kosovo in the first postwar phase (1945–1956). This period saw the affirmation of five ethnic groups as the principal Yugoslav constituent majority-nations within the titular republics, with Montenegrins and Macedonians gaining recognition alongside Serbs, Croats, and Slovenes. The migrations of the “Krajina Serbs” from Croatia and Bosnian Krajina to Vojvodina to consolidate the Serbian ethnic majority after the collective expulsion of Germans were a hallmark of the period. The period of pan-Yugoslav enthusiasm and extremely lively internal migrations between the republics (1956–1974), away from the titular ethnic community, was marked by a decline in the proportion of titular nations in the republics and the gradual destabilization of minority areas with high birthrates (Kosovo). Multi-nation-state-building was supported by socialist industrialization and urbanization, large-scale deagrarianization, and an increase in ethnic diversity in cities. The period of supranational disintegration (1974–1991) with growing crisis of governance and economic policy, as a result of pressure from abroad (IMF sanctions, the lively engagement of emigrant organizations and the secret service) and the rise of nationalisms, the migrations were markedly directed towards the republic of ethnic majority, notwithstanding multinational Bosnia and Herzegovina. The specific migration dynamics of return migrations and migrations of the descendants of former immigrants to the republics of the ethnic center (i.e., the titular republic) were characterized by a high proportion of hetero-ethnic marriages and a tremendous increase in the supranational Yugoslav affiliation at censuses. Throughout the three periods, a special type of pseudo-voluntary migration masked the conditions of inflicted circumstances

and the desired resettlement of a specific ethnic population. A process of internal consolidation unfolded, especially in formerly ethnically diverse districts and sub-regions of Bosnia and Herzegovina, from which minority populations gradually emigrated. Within Serbia's autonomous provinces, opposing processes emerged: Serbs gained a majority in Vojvodina, while in Kosovo, they lost a significant share to the growing Albanian population. Alongside the titular national majority populations in Croatia, Serbia, Montenegro, and Macedonia, homogeneous areas of the second most populous ethnicity also formed, such as Serbs in Krajina, Muslims in Sandžak, Albanians and Croats in the Montenegrin Littoral, and Albanians in Polog and northwestern Macedonia. When Yugoslavia disintegrated (1990–1992), Slovenia was the only republic left without a sizeable ethnic minority.

UČENJE SLOVENSKEGA JEZIKA IN OHRANJANJE SLOVENSKE KULTURE V BOSNI IN HERCEGOVINI

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IZVLEČEK

Učenje slovenskega jezika in ohranjanje slovenske kulture v Bosni in Hercegovini
Stiki med Republiko Slovenijo ter Bosno in Hercegovino so tesni, kar med drugim lahko pripišemo bogati zgodovini preseljevanja ljudi med državama. Avtorja se v prispevku osredotočata na sodelovalni vidik med različnimi ustanovami in organizacijami, ki so vpete v procese poučevanja slovenščine in/ali ohranjanja slovenske kulture v Bosni in Hercegovini. Posebna pozornost je namenjena vključevanju poučevanja slovenščine na univerzitetni ravni izobraževanja, saj je slednje po razpadu Socialistične federativne republike Jugoslavije za skoraj dvajset let zastalo.

KLJUČNE BESEDE: dopolnilni pouk slovenskega jezika in kulture, lektorati slovenščine v tujini, slovenščina, slovenska društva, Bosna in Hercegovina

ABSTRACT

Learning the Slovenian Language and Preserving Slovenian Culture in Bosnia and Herzegovina

Relations between the Republic of Slovenia and Bosnia and Herzegovina are close, also due to the rich history of migration between the two countries. This article focuses on the collaborative aspect between various institutions and organizations involved in teaching the Slovenian language and/or preserving Slovenian culture in Bosnia and Herzegovina. Particular attention is paid to the inclusion of higher education, as the teaching of Slovenian at this level came to a halt for nearly two decades following the dissolution of the Socialist Federal Republic of Yugoslavia.

KEYWORDS: supplementary classes of the Slovenian language and culture, lectureships of the Slovenian language abroad, Slovenian language, Slovenian cultural associations, Bosnia and Herzegovina

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UVOD

Sodobne raziskave obravnavajo priseljevanje v Slovenijo iz Bosne in Hercegovine v drugi polovici 20. in v 21. stoletju, vendar so se od 19. stoletja naprej ljudje preseljevali tudi iz Slovenije v Bosno in Hercegovino. Slovenci so v Bosni in Hercegovini opravljali sezonska dela v gozdovih, se zaposlovali v rudnikih, sodelovali so pri avstro-ogrski okupaciji Bosne in Hercegovine leta 1878. Leta 1910 je bilo v Bosni in Hercegovini okoli 230.000 priseljenih iz drugih dežel avstro-ogrske monarhije, med njimi več kot 3.000 Slovenk in Slovencev, pri čemer jih je 399 delovalo na državnih uradnih, v šolstvu, sodstvu in zdravstvu. Ob koncu 19. in na začetku 20. stoletja so Bosno in Hercegovino obiskovale številne slovenske ustvarjalke, ustvarjalci, ndr. Ivana Kobilca, Zofka Kveder Jelovšek, Ivan Cankar in Anton Aškerc, ki so po državi potovali, v njej začasno živeli in tam ustvarjali svoja umetniška dela (Kržišnik - Bukič, 2007; Koblar, 2008). V drugi polovici 20. stoletja so bile selitve pogostejše v obratni smeri: več ljudi se je preseljevalo iz Bosne in Hercegovine v Slovenijo. Enako je tudi v 21. stoletju – v Slovenijo se priseli največ ljudi ravno iz Bosne in Hercegovine.¹ Najpogostejši razlog je iskanje zaposlitve, takoj zatem pa združevanje družine.

V prvem delu prispevka se osredotočava tudi na tiste, ki so se v Bosni in Hercegovini trajneje naselili, ter na potomke in potomce slovenskih izseljenk in izseljencev, ki so se tja preselili v času Avstro-Ogrske in Jugoslavije (z različnimi imeni). To so bile migracije znotraj iste države, torej notranje, in ne mednarodne.² Dodati velja, da je v delu Bosne in Hercegovine, ki se imenuje Republika Srbska, slovenska manjšina – poleg črnogorske, češke, italijanske, židovske, madžarske, makedonske, nemške, poljske, romske, slovaške in ukrajinske – ena od priznanih in zaščitenejših manjšin, od leta 2003 združenih v Zvezo narodnih manjšin Republike Srbske (Kovč & Kremenovič, 2012). Nekateri z različnimi oblikami združevanja, zlasti v okviru slovenskih društev, še danes ohranjajo stik s slovenskim jezikom in kulturo. Leta 2014, ko je Janja Žitnik Serafin z ekipo zaključila raziskavo o dejavnostih slovenskih društev na področju držav naslednic nekdanje skupne države Jugoslavije, je na območju Bosne in Hercegovine delovalo deset slovenskih društev (Žitnik Serafin, 2014; 2015), konec leta 2022 pa, kot ugotavlja pričujoča raziskava, sedem. Druga oblika združevanja in povezovanja, temelječa na prednicah in prednikih, priseljenih v Bosno in Hercegovino iz Slovenije, je dopolnilni pouk slovenskega jezika in kulture. V šolskih letih

1 Leta 2022 se je v Slovenijo preselilo 35.613 ljudi, od tega 31.905 tujih državljanek, državljanov. Med slednjimi jih je bilo, tako kot že vrsto let, največ iz Bosne in Hercegovine (36 %). Največ v Slovenijo priseljenih tujih državljanek, državljanov se je priselilo z namenom zaposlitve (51 %). Veliko se jih je priselilo tudi z namenom pridružitve svojim družinskim članom (22 %). Večji kot običajno je bil delež priseljenih zaradi drugih razlogov (20 %), kamor štejejo tudi osebe, ki jim je bila v Sloveniji priznana začasna zaščita. 5 % priseljenih oseb je v Slovenijo prišlo zaradi šolanja oz. študija (Razpotnik 2023a; 2023b).

2 Izjema je obdobje med prvo in drugo svetovno vojno, ko Primorska, iz katere se je v Banjaluko in okolico v tem obdobju izselilo veliko slovenskih družin, ni bila del Jugoslavije, ampak del Kraljevine Italije, zato v tem primeru ni šlo za notranje migracije.

2020/21 in 2021/22 so v Bosni in Hercegovini poučevale tri učiteljice, financirane iz Slovenije. Poleg tega so v študijskem letu 2020/21 v Bosni in Hercegovini še delovali trije lektorati, kjer so se lahko študentke, študenti učili slovenščino, in sicer dva v Banjaluki in eden v Sarajevu, konec leta 2022 pa sta delovala dva.

V preteklosti so že bile raziskane zgodovinske okoliščine izseljevanja iz Slovenije v Bosno in Hercegovino in predstavljene izbrane življenjske zgodbe (Kržišnik - Bukič, 2007; Koblar, 2008; Papež Adamič, 2009; Uduč, 2011; 2014; Debeljak v Milharčič Hladnik & Vižintin, 2024, str. 202–209), raziskano je bilo tudi slovensko društveno delovanje v Bosni in Hercegovini in dopolnilni pouk slovenščine (Lokar, 2013; Žitnik Serafin, 2014; Vižintin, 2015; Tomažič, 2018). Niso pa bile v dotedanje raziskave vključene univerze z lektorati, saj je v letih po razpadu Jugoslavije in slovenski osamosvojitvi v Bosni in Hercegovini prišlo do skoraj dvajsetletne prekinitve delovanja lektoratov. Prav tako se nobena predhodna raziskava ni osredotočila na sodelovanje med slovenskimi društvi, dopolnilnim poukom slovenskega jezika in kulture ter lektorati v Bosni in Hercegovini. Ta primanjkljaj smo nadoknadili s terensko raziskavo leta 2022, v kateri smo se osredotočili na sodelovanje omenjenih akterjev.

METODOLOGIJA

Cilj raziskave leta 2022 je bil ugotoviti, katere oblike sodelovanja in povezovanja potekajo med organizacijami, ustanovami v Bosni in Hercegovini, ki skrbijo za poučevanje ter ohranjanje slovenskega jezika in kulture, in sicer v obliki društvenih dejavnosti, dopolnilnega pouka slovenskega jezika in kulture ali na univerzah. Na slednjih lahko slovenski jezik in književnost študentke, študenti študirajo na lektoratih, a tovrstno organizirano poučevanje in učenje ni nujno povezano s slovenskimi prednicami, predniki. Zanimalo nas je, kako se povezujejo te ustanove, organizacije, zato smo sodelujočim postavili dve glavni raziskovalni vprašanji s podvprašanji:

1. Kako poteka sodelovanje, povezovanje med slovenskim društvom / lektoratom slovenščine / dopolnilnim poukom slovenskega jezika in kulture v vašem okolju v Bosni in Hercegovini?
 - 1.1. S katerimi organizacijami, ustanovami sodelujete?
 - 1.2. Katerih dogodkov se udeležujete v Sloveniji?
 - 1.3. Kakšna je vaša motivacija za učenje slovenščine oz. za podporo pri učenju slovenščine?
2. S katerimi izzivi se soočate pri povezovanju in sodelovanju?

V Bosni in Hercegovini je bila opravljena kvalitativna raziskava – v letu 2022 so bili izvedeni skupinski ali individualni polstrukturirani intervjuji z odgovornimi ali s sodelujočimi v izbranih organizacijah. Intervjuji so potekali v živo ali pisno po elektronski pošti, upoštevajoč želje in možnosti sodelujočih. Anonimni intervjuji so bili izvedeni s tremi lektoriciami, lektorji ter njihovimi študentkami, študenti, od katerih

se jih je za sodelovanje odločilo enajst; s predstavnicami, predstavniki štirih slovenskih društev (od sedmih delujočih); z dvema učiteljicama dopolnilnega pouka (od treh, ki so poučevale) ter s petimi učenkami, učenci, ki so se odločili za sodelovanje. Za dodatna pojasnila o izzivih poučevanja v času pandemije koronavirusa sva se obrnili na učiteljico dopolnilnega pouka slovenskega jezika in kulture Barbaro Hanuš (2022).

Pri intervjujih v živo so bili narejeni zapiski; nekatere predstavnice, predstavniki društev so jih uredili naknadno. Po vseh pridobljenih odgovorih je bila opravljena tematska analiza za identifikacijo ključnih tem in vzorcev, ki so se pojavili v odgovorih sodelujočih. Ta metoda je omogočila globlji vpogled v izkušnje in poglede posameznic, posameznikov, ki so vključeni v procese učenja ali poučevanja slovenskega jezika in/ali ohranjanja slovenske kulture v Bosni in Hercegovini. Podatki so bili kodirani na podlagi glavnih tem (sodelovanje, društvo, lektorat, dopolnilni pouk, motivacija za učenje slovenščine), ki so bili identificirani skozi analizo pogovorov.

V prihodnosti bi bilo za celostno podobo treba opraviti intervjuje s predstavnicami, predstavniki vseh delujočih slovenskih društev, z vsemi učiteljicami dopolnilnega pouka, z več učenkami, učenci in z več študentkami, študenti, pa tudi s podpornimi organizacijami v Sloveniji, na tem mestu pa so zaradi časovnih in finančnih omejitev predstavljeni le delni rezultati raziskave o razmerah za učenje slovenskega jezika in ohranjanje slovenske kulture ter o povezovanju izbranih organizacij, ustanov v Bosni in Hercegovini leta 2022.

SLOVENSKI JEZIK IN OHRANJANJE SLOVENSKE KULTURE

V državah naslednicah nekdanje skupne države Jugoslavije je leta 2014 delovalo 44 slovenskih društev, od tega deset v Bosni in Hercegovini (Žitnik Serafin, 2014; 2015). Prav tako je bil v teh državah organiziran dopolnilni pouk slovenskega jezika in kulture, in sicer so ga leta 2014 v Bosni in Hercegovini poučevale tri učiteljice (Vižintin, 2015). Do leta 2022 se število učiteljic dopolnilnega pouka slovenskega jezika in kulture ni spremenilo, se je pa spremenil en kraj, v katerem so poučevale. Zmanjšalo se je število slovenskih društev: čas pandemije koronavirusa, izseljevanje iz Bosne in Hercegovine, staranje prebivalstva in odsotnost pomlajevanja sodelujočih v društvih ter drugi razlogi so vplivali na to, da je bilo slovenskih delujočih društev konec leta 2022 v Bosni in Hercegovini le še sedem. Učenje slovenščine na univerzitetni ravni je bilo v študijskem letu 2022/23 mogoče na dveh bosansko-hercegovskih univerzah.

Slovenščina na univerzitetni ravni

Slovenščino se je v okviru lektoratov ali študija slovenskega jezika, literature, kulture mogoče učiti na 58 univerzah po svetu. Med njimi prevladujejo evropske univerze, izven Evrope pa je učenje slovenščine možno na Japonskem, Kitajskem, v ZDA in

Argentini (Center za slovenščino, 2025). V Bosni in Hercegovini so ob začetku projekta »Potomci slovenskih izseljencev ter ohranjanje slovenskega jezika v Bosni in Hercegovini«, v okviru katerega je potekala v nadaljevanju predstavljena raziskava, leta 2021 delovali trije lektorati slovenščine: na zasebni Panevropski univerzi Apeiron v Banjaluki (od 2010/11 do 2021/22), na Filozofski fakulteti Univerze v Sarajevu (od 2015/16) ter na Filološki fakulteti Univerze v Banjaluki (od 2018/19).

Slovenščina na Univerzi v Sarajevu³

Na Oddelku za slovanske jezike in književnosti Filozofske fakultete Univerze v Sarajevu (v nadaljevanju FF UNSA) deluje lektorat slovenščine, ki ga izvaja napoteni učitelj slovenščine, ki je zaposlen na Filozofski fakulteti Univerze v Ljubljani. Začetki lektorata sicer segajo v leto 1955 (Marjanović, 2015),⁴ vendar je ta prenehal delovati leta 1992, ponovno pa je bil vzpostavljen v študijskem letu 2015/16. Lektorati na FF UNSA potekajo za različne profile učečih se: kot obvezni izbirni predmet na Oddelku za slovanske jezike v okviru enopredmetnega in dvopredmetnega magistrskega študija (Slovenski jezik 1 in 2), kot izbirni predmet za študentke, študente drugih smeri FF UNSA (Slovenski jezik 1 in 2) ter kot t. i. fakultativni predmet za študente FF UNSA kot tudi drugih fakultet UNSA (na štirih ravneh). Predmeti imajo status predavanja in seminarjev. V študijskem letu 2015/16 pa je potekal tudi tečaj slovenščine za zunanje udeležence, udeležence (Ocepek, 2022).

Lektorat slovenščine na FF UNSA glede na letna poročila Centra za slovenščino kot drugi in tuji jezik sodi med najštevilčnejše lektorate slovenščine na tujih univerzah.⁵ Pri posameznih predmetih je vpisanih 54–123 udeleženi, povprečno to znaša 79 na leto (Preglednica 1). Do študijskega leta 2019/20 je zaslediti stabilen porast udeleženi, v študijskih letih 2020/21, 2021/22 in 2022/23 pa zasledimo tendenco upada.

3 Podatki v naslednjih treh podpoglavjih izhajajo iz letnih poročil Centra za slovenščino kot drugega in tujega jezika med letoma 2015 in 2023 (Lutar, 2016; 2017; 2018; 2019; 2020; 2021; 2022; 2023; 2024), ki so dopolnjeni s podatki iz intervjujev z lektoriciami, lektorji slovenščine na teh univerzah. Zaradi prekrivanja podatkov viri niso navedeni ob vsakem podatku. V delu, ki se nanaša na slovenščino na Univerzi v Sarajevu, so bili uporabljeni tudi podatki iz člankov Pavla Ocepka *Slovenistika na Univerzi v Sarajevu* (Ocepek, 2019b), »Ne, ne zapirajmo, odprimo!« O lektoratu slovenskega jezika na Oddelku za slovanske jezike in književnosti FF UNSA (Ocepek, 2020) ter *Izveščaj o radu – lektorat za slovenski jezik (2015–2023)* (Ocepek, 2022), v primeru lektorata na Univerzi v Banjaluki pa še podatki iz njegovega članka *Slovenistika na Univerzi v Banjaluki* (Ocepek, 2019a).

4 Pavel Ocepek (2019b, str. 38) navaja letnico 1974.

5 Podatki v Letnem poročilu Centra za slovenščino kot drugi in tuji jezik za leto 2022 (Lutar, 2023, str. 7–9) kažejo, da je bila sarajevska slovenistika peta največja (pred njo so bile slovenistike v Beogradu s 378 študentkami, študenti, v Buenos Airesu s 115, v Celovcu s 84 ter v Zagrebu s 86 študentkami, študenti. V študijskem letu 2022/23 pa je bilo Sarajevo kljub precejšnjemu padcu vpisanih na šestem mestu (Beograd 444, Buenos Aires 101, Krakov 67, Bratislava in Cleveland po 61 ter Zagreb 56; Lutar, 2024, str. 9–11). Ob tem velja opozoriti, da je pojem *slovenistika* v primeru teh podatkov iz Letnih poročil razumljen nekoliko širše – ne le kot lektorat slovenskega jezika, ampak tudi predmeti, ki obsegajo kakšnega od elementov slovenske kulture ali zgodovine.

Štud. leto	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Št. udeleženi	54	68	60	76	123	110	81	57

Preglednica 1: Skupno število udeleženi na lektoratu slovenščine na FF UNSA (viri: Očepek, 2022, str. 4–7; Lutar, 2016; 2017; 2018; 2019; 2020; 2021; 2022; 2023; 2024).

Lektorat je umeščen v t. i. tip B,⁶ kar pomeni, da je sistemiziran in financiran na slovenski in tuji strani – učiteljico, učitelja sofinancirata Slovenija in univerza gostiteljica. FF UNSA sofinancira tudi nastanitev učitelja slovenščine na tuji univerzi, poleg tega fakulteta podpira lektorat v okviru informativnih dni fakultete. Med študijskima letoma 2015/16 in 2022/23 so na lektoratu med drugim priredili:

- 13 gostujočih predavanj raziskovalk, raziskovalcev, zlasti iz Filozofske fakultete Univerza v Ljubljani, sicer pa še iz Filozofske fakultete Univerze v Mariboru, ZRC SAZU ter Filološke fakultete Univerze v Beogradu;
- pet literarnih večerov, na katerih je sodelovalo osem slovenskih pesnic;
- Dneve slovenskega filma oz. od leta 2017 Dneve sodobnega slovenskega filma (Dani novog slovenskog filma), in sicer v sodelovanju FF UNSA, Slovenskega filmskega centra in Slovenskega društva Cankar Sarajevo;
- dve strokovni ekskurziji v Slovenijo (v letih 2016 in 2018).

Študentke, študenti se redno udeležujejo tudi drugih gostovanj slovenskih kulturnih ustanov in dogodkov, posvečenih slovenski kulturi, ter sodelujejo pri dogodkih za promocijo študija v Sloveniji (na Univerzi v Ljubljani, Univerzi v Mariboru, Univerzi v Novi Gorici in Univerzi na Primorskem).

Slovenščina na Univerzi v Banjaluki

Lektorat slovenščine na Filološki fakulteti Univerze v Banjaluki (v nadaljevanju FF UNBA) deluje od študijskega leta 2018/19. Sprva je lektorat eno leto izvajal napoteni lektor na Univerzi v Sarajevu, od drugega študijskega leta naprej pa sta lektorat izvajala nova napotena lektorica in lektor na FF UNBA. Lektorat obiskujejo tako študentke, študenti FF UNBA kot zunanje udeleženke, udeleženci. Prvo leto delovanja ga je obiskovalo 38 oseb, v nadaljnjih letih pa je število variiralo med 10 in 17, povprečje je 18,4 udeleženi na študijsko leto (Preglednica 2).

6 Lektorati v okviru programa Slovenščina na tujih univerzah so razdeljeni v tri skupine: (1) tip A – lektorica, lektor je zaposlen na slovenski strani, plačuje ga samo Republika Slovenija, (2) tip B – lektorat je sistemiziran in financiran na slovenski in tuji strani (lektorico, lektorja sofinancirata Slovenija in univerza gostiteljica) in (3) tip C – lektorica, lektor s slovenske strani ni financiran, na voljo ima sredstva za strokovno literaturo, udeleži se lahko izobraževanj, na univerzi gostiteljici ima različne statute.

Štud. leto	2018/19	2019/20	2020/21	2021/22	2022/23
Št. udeležениh	38	14	13	17	10

Preglednica 2: Skupno število udeležениh na lektoratu slovenščine na FF UNBA (vir: Lutar, 2019; 2020; 2021; 2022; 2023; 2024).

Tudi lektorat na Univerzi v Banjaluki je umeščen v tip B, kar pomeni, da je sistemiziran in financiran na slovenski in tuji strani – učiteljico, učitelja sofinancirata Slovenija in univerza gostiteljica.

Med študijskima letoma 2018/19 in 2022/23 so na lektoratu med drugim priredili:

- pet literarnih večerov oziroma predstavitev knjig,
- štiri druge kulturne dogodke (razstavo, dogodek ob Prešernovem dnevu, predvajanje slovenskih filmov),
- eno gostujoče predavanje raziskovalke s Filozofske fakultete Univerze v Ljubljani.

Slovenščina na Panevropski univerzi Apeiron v Banjaluki

Slovenščino se je bilo v okviru lektorata na Panevropski univerzi Apeiron v Banjaluki, na katerega so se lahko vpisovale študentke, študenti vseh fakultet na univerzi,⁷ možno učiti od študijskega leta 2010/11. V nadaljnjih letih je bilo mogoče obiskovati predmete Slovenski jezik I, II, III in IV, pri čemer so bili sprva vsi predmeti obvezni za študentke, študente študijskega programa Rusistika, od študijskega leta 2020/21 pa sta predmeta Slovenski jezik III in IV postala izbirna, s čimer se je število študentk, študentov znatno znižalo. V študijskem letu 2017/18 se je lektoratov udeleževalo približno 35 študentk, študentov.⁸

Predmeti so obsegali predavanja in vaje. Posebnost Panevropske univerze Apeiron v Banjaluki je bila, da je bil celoten pedagoški proces sneman, kar je omogočilo vključitev v izobraževalni proces tudi študentkam, študentom na oddelkih, ki jih ima univerza v Bijeljini in Beogradu.⁹ Lektorata na Panevropski univerzi Apeiron kot edini od treh lektoratov slovenščine v BiH ni bil koordiniran s slovenske strani. Delo lektorja je opravljala oseba iz Slovenije, ki je imela v sklopu posameznega predmeta le 12 ur predavanj, preostalih 22 vaj pa je opravila asistentka učiteljica, ki je prihajala

7 Danes je nabor fakultet naslednji: Fakulteta za poslovno ekonomijo, Fakulteta za pravne vede, Fakulteta za informacijske tehnologije, Fakulteta za zdravstvene vede, Fakulteta za športne vede, Fakulteta za filološke vede, Fakulteta za promet.

8 Natančnejši podatki o številu udeležениh na lektoratu po letih niso bili dostopni.

9 Posebnost izvedbe lektorata je v izraziti interaktivnosti, zato tovrstni posnetki ne morejo v celoti nadomestiti udeležbe v živo. Na drugi strani pa je bila v času pandemije koronavirusa s predstavitev učnega procesa na spletni videoplatforni omogočena enakovredna udeležba študentk, študentov iz vseh treh centrov: Banjaluke, Bijeljine in Beograda (vir L3).

v Banjaluko iz Bijeljine, ure pa je izvedla v blokih, in ne kontinuirano skozi celoten semester.¹⁰ Od študijskega leta 2022/23 naprej lektorat na tej univerzi ne deluje več.

Slovenska društva in dopolnilni pouk slovenskega jezika in kulture

Organizirano društveno delovanje in dopolnilni pouk slovenskega jezika in kulture v samostojni Republiki Sloveniji nista novost. Za ohranjanje in razvoj slovenskega jezika in kulture so skrbale državne oblasti in/ali sprejemne države, v katere so se izselile slovenske izseljenke in izseljenci, tako v času med obema svetovnima vojnama kot po drugi svetovni vojni (Trebše Štolfa & Klemenčič, 2001; Kalc et al., 2020; Lukšič Hacin, 2024). Pomembno je bilo delovanje posameznikov in posameznikov, ki so premagovali birokratske ovire pri ustanavljanju društev in organizaciji dopolnilnega pouka slovenskega jezika in kulture, tako v Bosni in Hercegovini kot po drugih državah. Z(a) odraslimi so se selili tudi otroci (Josipovič, 2015; Vižintin, 2021), za katere je bil organiziran dopolnilni pouk slovenskega jezika in kulture.

Ohranjanje slovenskega jezika in kulture v Bosni in Hercegovini med (večinoma) potomkami, potomci slovenskih izseljenk, izseljencev je »po letu 1991 postala prednostna naloga slovenskih društev, ki delujejo v novonastalih državah nekdanje Jugoslavije« (Lokar, 2013, str. 236), poleg tega je cilj tudi ohranjanje slovenske identitete (Tomažič, 2018, str. 211). Jezik in identiteta sta tesno prepletena, jezik je pomemben dejavnik identifikacije in kontinuitete posamezne kulture, ki med seboj povezuje generacije njenih članov in je eden od konstitutivnih elementov skupinske zavesti (Južnič, 1983; Luckmann, 1991), kar se je pokazalo tudi pri izseljenih iz Slovenije v Bosno in Hercegovino ter njihovih potomkah in potomcih.

Dopolnilni pouk slovenskega jezika in kulture¹¹ so tako leta 2014 (Žitnik Serafin, 2014) kot 2022 izvajale tri učiteljice. Število krajev je ostalo enako (osem). Čeprav je v enem kraju (Teslić) dopolnilni pouk prenehal delovati, je na novo zaživel v drugem

10 Slednje je po mnenju L2 problematično, saj je pri usvajanju jezika pomembna kontinuiteta. V primeru izvajanja lektoratov v blokih lahko med posameznimi izvajanji mine več tednov, ko študentke, študenti niso v stiku z jezikom, kar vsekakor ni dobro. To je verjetno tudi razlog za to, da po dostopnih podatkih ni bilo sodelovanja in povezovanja z drugimi organizacijami, ustanovami.

11 Dopolnilni pouk slovenskega jezika in kulture je v šolskem letu 2020/21 obiskovalo okoli 1.900 udeleženk in udeležencev, od tega več kot 1.000 otrok. Slovenščino je poučevalo 36 učiteljic in učiteljev, od tega 13 napotenih in 23 nenapotenih; nekateri poučujejo v več državah. Pouk je bil organiziran v 19 državah: v Avstriji (2 učitelja, učiteljici), Belgiji (1), Bosni in Hercegovini (3), Češki republiki (1), Črni gori (1), na Danskem (1), Finskem (1), v Franciji (3), na Hrvaškem (7), v Lihtenštajnu (1), Luksemburgu (1), Makedoniji (2), Nemčiji (6), na Nizozemskem (1), v Rusiji (1), Srbiji (6), na Švedskem (1) v Švici (3) in Veliki Britaniji (1) (Zavod, n.d.). Primerjava stanja s šolskim letom 2014/15 pokaže, da sta se povečali tako število otrok, ki so obiskovali pouk, kot število držav, kjer je ta potekal: v šolskem letu 2014/15 je pouk potekal v 13 državah, obiskovalo ga je okoli 1.600 udeležencev, udeleženk, od tega okrog 900 otrok, 38 otrok pa se je slovenščino učilo na daljavo. Poučevalo je 35 učiteljev, od tega 15 napotenih, 13 nenapotenih in 6 na daljavo (Vižintin, 2015).

kraju (Breza) pri novi učiteljici; ostali kraji poučevanja so: Sarajevo, Zenica, Kakanj, Banjaluka, Slatina, Prijedor, Tuzla.

Leta 2014 je v Bosni in Hercegovini delovalo deset slovenskih društev, ki so združevala več kot 4.000 članic in članov, in sicer v krajih Sarajevo, Kakanj, Zenica, Tuzla, Breza, Banjaluka, Dobo, Prijedor in Vitez.¹² Kot navaja Janja Žitnik Serafin (2014, str. 163), je od leta 2010 delovala Zveza slovenskih društev v Bosni in Hercegovini Evropa zdaj. Dušan Tomažič (2018, str. 211) omenja dva poskusa ustanovitve novih društev v 21. stoletju, ki pa nista bila uspešna: leta 2014 ustanovljeno slovensko društvo v Bihaću je bilo leta 2018 že neaktivno, leta 2015 pa je prišlo še do poskusa ustanovitve še enega slovenskega društva v Bijeljini, vendar so bile aktivnosti za ustanovitev društva ustavljene. Do leta 2022 sta v Bosni in Hercegovini svoja vrata zaprli društvi v Vitezu in Doboju ter Slovenska skupnost v Sarajevu, eno od dveh sarajevskih društev. Posledično je leta 2022 delovalo še sedem slovenskih društev: Društvo Slovencev Republike Srbske Triglav Banjaluka, Združenje meščanov Slovencev Breza, Slovensko združenje meščanov Kakanj, Združenje Slovencev Lipa Prijedor, Slovensko kulturno društvo Cankar Sarajevo, Združenje meščanov slovenskega porekla Tuzla ter Slovensko združenje meščanov občine Zenica.

Sodelovanje, povezovanje in izzivi¹³

Primarne naloge delujočih v slovenskih društvih po svetu, pri dopolnilnem pouku slovenskega jezika in kulture ter na lektoratih so poučevanje in/ali ohranjanje slovenskega jezika, kulture. Vendar pa s svojim medsebojnim sodelovanjem prispevajo tudi k povezovanju različnih organizacij in se trudijo za podobne cilje, čeprav imajo različne ciljne skupine.

Lektorati

Na vprašalnik so odgovorile tri lektorice, lektorji in enajst študentk, študentov. Analiza odgovorov kaže, da je sodelovanje z lokalnimi slovenskimi društvi v veliki meri odvisno od angažmaja lektorice, lektorja oz. deloma tudi od ureditve njenega oz. njegovega statusa. Če lektorat izvajajo osebe, ki so nastanjene v mestu izvajanja

12 Slovenska skupnost Sarajevo, Slovensko združenje meščanov Kakanj, Slovensko združenje meščanov občine Zenica, Slovensko kulturno društvo Cankar Sarajevo, Združenje meščanov slovenskega porekla Tuzla, Združenje meščanov Slovencev Breza, Društvo Slovencev Republike Srbske »Triglav« Banjaluka, Društvo Slovencev regije Dobo – Teslić Prežihov Voranc Dobo, Združenje Slovencev »Lipa« Prijedor, Združenje Slovencev Vitez (Žitnik Serafin, 2014, str. 163).

13 V analizi raziskave so uporabljeni naslednji simboli za udeležene: Š – študentke, študenti na univerzah (Š1–Š11); L – lektorice, lektorji slovenščine (L1–L3); U – učiteljici dopolnilnega pouka slovenskega jezika in kulture (U1, U2); S – učenke, učenci dopolnilnega pouka slovenskega jezika in kulture (S1–S5); D – predstavnice, predstavniki slovenskih društev v Bosni in Hercegovini (D1–D4).

pouka slovenščine,¹⁴ je načeloma tudi več možnosti za sodelovanje z društvi in organizacijo dodatnih aktivnosti (L2). Sodelovanje z učiteljico oz. učiteljem dopolnilnega pouka v nekaterih primerih poteka zgledno, sicer pa večinoma temelji bolj na vzajemnem obveščanju o dogodkih.

Sodelovanje z društvi je kot dobro ocenila ena študentka, študent (Š1): »Združujejo nas promocije knjig, gosti iz Slovenije, martinovanje, Slovenski dan v Slatini ter druge prireditve, ki jih društvo organizira.« Druge intervjuvanke, intervjuvanci bodisi ne sodelujejo z društvi in učiteljicami dopolnilnega pouka bodisi se do sodelovanja niso opredelile, opredelili.

Ko odgovor na prvo raziskovalno vprašanje, kako poteka sodelovanje, povezovanje med slovenskim društvom / lektoratom slovenščine / dopolnilnim poukom slovenščine, lahko ugotovimo, da je pri lektoratih izpostavljeno sodelovanje z društvi, medtem ko dopolnilni pouk slovenskega jezika in kulture ni izpostavljen niti pri lektorih, lektorjih niti pri študentkah, študentih. Na podvprašanje 1.2 (katerih dogodkov se udeležujejo v Sloveniji), so tri osebe (Š5, Š8, Š11) odgovorile, da so se udeležile Seminarja slovenskega jezika, literature in kulture, ter to izpostavile kot posebno prednost.

Na podvprašanje 1.3 (motivacija za učenje slovenščine na univerzi) je pet študentk, študentov odgovorilo, da so za učenje slovenščine motivirani zaradi morebitnega, v nekaterih primerih načrtovanega študija v Sloveniji (Š1, Š2, Š5, Š8) oziroma študijske izmenjave v okviru programa Erasmus+ (Š11). Enako število intervjuvanih je kot motivacijo izrazilo željo po učenju drugih jezikov (Š3, Š7) oziroma drugih slovanskih jezikov (Š2, Š5, Š9). Štiri osebe (Š3, Š1, Š10, Š11) želijo delati oziroma živeti v Sloveniji, ena oseba (Š9) pa želi Slovenijo obiskati. Nekaj intervjuvanih (Š3, Š6, Š9) ima družino, prijatelje ali znance, ki živijo v Sloveniji, dve osebi (Š4, Š11) želita v Sloveniji delati. Med odgovori glede motivacije za učenje slovenščine najdemo še dejstvo, da je osebi slovenščina všeč (Š11), in željo po spoznavanju slovenske kulture (Š6). Z možnostjo učenja slovenščine v okviru lektoratov so bile študentke, študenti seznanjeni na fakulteti oz. na fakultetnih spletnih straneh (Š2, Š6, Š9, Š10, Š11). Ena oseba (Š11) je pri tem izpostavila prednost, da gre za brezplačno možnost učenja jezika, pet oseb (Š3, Š4, Š5, Š7, Š8) se je za vpis na lektorat odločilo zaradi priporočila starejših študijskih kolegic, kolegov ali prijateljev, prijatelj, eno osebo (Š1) pa je s to možnostjo seznanila profesorica na fakulteti.

Pri drugem raziskovalnem vprašanju (izzivi pri povezovanju in sodelovanju), izpostavlja odgovor ene do lektorice, lektorjev (L3), ki ne vidi prednosti poglobljenega povezovanja: »Lektorat slovenščine in dopolnilni pouk slovenskega jezika delujeta neodvisno drug od drugega in pravzaprav ni potrebe po poglobljenem sodelovanju, seveda pa je dobrodošlo obveščanje o dogodkih in morebitna skupna organizacija kakšnega dogodka.« Zanimiv je predlog ene od študentk, študentov

14 Nekateri lektorice, lektorji so nastanjeni v mestu izvajanja lektorata, drugi pa svoje obveznosti izvajajo strnjeno, zato tam niso stalno prisotni.

(Š1), ki je izrazila tudi željo po organizaciji poletne šole slovenščine v Bosni in Hercegovini, kar kaže na dodatno motiviranost za učenje slovenščine.

Slovenska društva

V raziskavi sodelujoča društva, štiri od sedmih delujočih v Bosni in Hercegovini leta 2022, večinoma dobro in veliko sodelujejo z učiteljico dopolnilnega pouka slovenskega jezika in kulture. Iz odgovorov na obe raziskovalni vprašanji je mogoče sklepati, da je sodelovanje društev z lektorati pogojeno z bližino univerze; če društvo in lektorat delujeta v istem mestu, je sodelovanje intenzivnejše in srečanja potekajo večkrat (D1, D4), sicer pa le izjemoma.

Eno izmed društev ocenjuje, da sodelovanje med društvom in učiteljico dopolnilnega pouka slovenskega jezika in kulture poteka »izredno dobro«, in poudarja: »Ne gre samo za dopolnilni pouk slovenščine, pomembno je tudi spoznavanje slovenske kulture. Spremljamo, spoštujemo in obeležujemo slovenski kulturni praznik Prešernov dan, dan reformacije in druge slovenske praznike« (D1). Nekatere učiteljice povabijo iz Slovenije v Bosno in Hercegovino številne gostje, goste, kulturnih dogodkov (npr. gledališke predstave, srečevanja s pisateljicami, pisatelji) se udeležujejo tudi članice, člani društev, ki ne obiskujejo dopolnilnega pouka slovenskega jezika in kulture. Učiteljice so posrednice tudi pri sodelovanju s slovenskimi šolami in izmenjavi učenk, učencev (D1).

V društvih se zavedajo, da učiteljice ne poučujejo samo v enem kraju – »učiteljica izvaja učni program, več dni je na terenu, ima veliko ur drugje, kar je naporno, veliko je na cesti« (D4) – a navkljub temu »odlično sodelujemo, otroci jo imajo zelo radi, odrasli tudi. Sodeluje pri društvenih prireditvah, z učiteljico se zmenimo, kaj pričakujemo od nje, skupaj načrtujemo, predlagamo skupne dejavnosti drug drugemu« (D3).

Društva obeležujejo slovenske praznike.¹⁵ Specifične dejavnosti so odvisne od zanimanja ter znanja članic in članov, prav vsa sodelujoča društva pa podpirajo dopolnilni pouk slovenskega jezika in kulture. Ponekod so močnejše glasbene, plesne ali likovne dejavnosti, drugod literarne ali planinske, berejo za bralno značko, obeležujejo svetovni dan čebel, pomemben praznik je tudi martinovanje. »Mi smo sami dobri ljudje, združeni v ljubezni do slovenskega jezika, dobre volje. Pouk je naša prva naloga; druga naloga je ohranjanje slovenstva, sodelovanje z društvom« (D4).

Sodelujoča društva so posebej izpostavila meddruštveno sodelovanje, ki je »zelo dobro in plodno, povsod, kjer se pokaže priložnost« (D4). Čeprav je »covid prekinil stike« (D4) in naddruštvena organizacija Evropa zdaj, ki je povezovala vsa slovenska društva v Bosni in Hercegovini (Žitnik Serafin, 2014), ne deluje več, se sodelovanje nadaljuje. »Pomembno je sodelovanje z drugimi društvi, da smo odprti, da se povezujemo – in to lahko počnejo mladi« (D3), se zavedajo v društvih. Vsa društva so

15 Za natančen popis društvenih dejavnosti glej Žitnik Serafin (2014).

tudi poudarila, da se predstavnice, predstavniki društev srečujejo enkrat letno in se dogovarjajo o skupnih društvenih dejavnostih, kot so kviz Male sive celice, slikarske kolonije, srečanja pevskih zborov in poletni tabori za otroke. Te dejavnosti presegajo lokalno društveno delovanje in spodbujajo sodelovanje društev v celotni Bosni in Hercegovini; podobno se povezujejo slovenska društva tudi v nekaterih drugih državah, npr. na folklorijadi in posvetu slovenskih organizacij v Nemčiji (Vižintin, 2021).

Pri podvprašanju 1.2 (dogodki, ki se jih udeležujejo v Sloveniji) so slovenska društva iz Bosne in Hercegovine odgovorila, da se redno udeležujejo prireditve Dobrodošli doma,¹⁶ otroci pa radi sodelujejo na poletnih jezikovnih taborih ob Soči v organizaciji Ministrstva za izobraževanje, znanost in šport ter na likovnih kolonijah v različnih krajih. Med šolami potekajo številne izmenjave otrok, redno poteka sodelovanje z različnimi pevskimi zbori v Sloveniji ter Bosni in Hercegovini. V Sloveniji dobijo društva podporo pri različnih državnih in lokalnih organizacijah, s katerimi potekajo živahne izmenjave in povezovanje. Posebej so društva (D1–D4) izpostavila naslednje organizacije, ustanove v Sloveniji: DRPD Novo mesto, Fotografski klub Janez Puhar Kranj, Knjižnica Srečka Vilharja Koper, Osnovna šola Ledina Ljubljana, Gimnazija in ekonomska šola Trbovlje, Rudarsko društvo Perkmandelj Trbovlje, Regionalni RTV-center Maribor, Center za slovenščino kot drugi in tuji jezik Univerze v Ljubljani, Društvo slovenskih pisateljev, Slovenska izseljenska matica, Svetovni slovenski kongres, Urad RS za Slovence v zamejstvu in po svetu, Narodna in univerzitetna knjižnica. Poimensko sta bila večkrat izpostavljena Dušan Tomažič, novinar RTV Maribor, ki je v oddaji »Rojaki« pripravil številne prispevke o delovanju slovenskih društev ter režiral nekaj dokumentarnih filmov o Slovenkah, Slovencih v Bosni in Hercegovini, ter Branka Bukovec, predsednica DRPD Novo mesto, ki jo je eden od sodelujočih (D2) poimenoval kar »Mati Tereza sodelovanja«.

Sodelovanje z univerzama, na katerih sta tudi lektorata za slovenščino, poteka večinoma tako, da se medsebojno obiskujejo na javnih dogodkih ter promovirajo in sofinancirajo dogodke drug drugega. Kot primere navajajo ogleda filmov, razstave, obletnice, literarne večere (D1, D4), društvo in lektorat sta »skupaj s slovensko ambasado in Čebelarsko zvezo« že večkrat obeležila svetovni dan čebel, v času epidemije bolezni covid-19 pa je bil dogodek organiziran po Zoomu. Društvo se na lektorat obrne tudi po pomoč pri prevajanju težjih besedil (D1). Odgovori društev torej potrjujejo sodelovanje, kot so ga navedli tudi lektorice, lektorji.

Društva, ki delujejo v bližini slovenskega veleposlaništva v Sarajevu, so izpostavila odlično sodelovanje z veleposlanikom Damijanom Sedarjem, ki jim je v podporo

16 Urad Vlade Republike Slovenije za Slovence v zamejstvu in po svetu organizira prireditve Dobrodošli doma, srečanje Slovenk, Slovencev iz zamejstva in sveta (v Sloveniji) v sodelovanju s slovenskimi občinami. Leta 2025 je bila prireditev organizirana v Novi Gorici, leta 2024 v Celju, leta 2023 v Vipavi, leta 2022 v Novem mestu, leta 2021 v Ribnici, leta 2020 je zaradi epidemije koronavirusa odpadla, leta 2019 v Radovljici, leta 2018 v Brežicah, leta 2017 v Rakičanu, leta 2016 v Ljubljani, leta 2015 na Ptuj, leta 2014 v Škofji Loki, v obdobju 2011–2013 pa v Ljubljani. Pred tem je tovrstne prireditve v Sloveniji organizirala Slovenska izseljenska matica, in sicer od leta 1954 (Rogelj, 2001).

tako pri promociji kot pri organizaciji dogodkov. Če ti potekajo v prostorih veleposlaništva, so društva razbremenjena tudi finančno, saj jim ni treba plačevati najemnine za prostor, v katerem potekajo večji javni dogodki. Vendar so tudi društva, ki ne delujejo v bližini slovenskega veleposlaništva v Sarajevu in se zaradi oddaljenosti ne morejo redno udeleževati prireditev na veleposlaništvu, pohvalila veleposlanika, da je odziven in da se udeležuje tudi večjih, pomembnejših prireditev v njihovih krajih (D2, D3).

Med odgovori na drugo raziskovalno vprašanje (izzivi, s katerimi se društva soočajo pri sodelovanju, ter kako to vpliva na njihovo delovanje) izpostavlja dva vidika: lokacijo izvajanja dopolnilnega pouka slovenskega jezika in kulture ter staranje društvenih članic, članov. Dopolnilni pouk slovenskega jezika in kulture se izvaja v društvenih prostorih (D1, D2) ali deloma v lokalnih šolah (D1, D3), tudi v prostorih veleposlaništva. Prenos dopolnilnega pouka slovenskega jezika in kulture iz društvenih prostorov v lokalne šole ali v druge (večje, primernejše, sodobnejše) prostore za društvo ne predstavlja vedno rešitve, temveč s seboj prinaša tudi nove izzive: »Izjemno pomembno je povezovanje in sodelovanje med družinami, otroki in društvom. Za delovanje društva ni dobro, da se prekinja kontakt med otroki in društvom. Prej, ko je poučevala učiteljica v društvenih prostorih, je bilo tudi več delavnic za otroke, npr. za gregorjevo, jurjevanje, zdaj pridejo otroci le na velikonočne in božične delavnice. Ko je bil pouk dopoldne v prostorih društva, je bil eden iz društva vedno tu, skuhali smo čaj, imeli so malico za otroke. Bil je stik, starši so pripeljali otroke, prebrali časopise, plačali so članarino, izvedeli so za dogajanje v društvu. Bili so osebni stiki. Zdaj poteka vse preko FB, tudi preko e-pošte, Viber skupine. Imajo pa zdaj otroci boljše prostorske pogoje. Dilema, kaj je boljše« (D4).

Drugi izziv, ki ga izpostavlja večina društev, je staranje društvenih članic in članov ter primanjkljaj mladih. Veliko ljudi si iz Bosne in Hercegovine želi oditi v Slovenijo. Toda »če odidejo v Slovenijo (ali v druge države) študirat ali delat, se le redkokdo vrne« (D2). Ponosni so na svoje otroke, a se sprašujejo, kako bo z društvenimi dejavnostmi v prihodnje, »saj so izgubili celo generacijo otrok« (D2), »zmanjka ljudi za delo v društvu, med 20. in 40. letom manjka ljudi, da bi prevzeli prireditve, organizacijo, sekcijo« (D3). V enem od društev so izpostavili željo, »da bi se v društvu več govorilo slovensko« (D1). Zavedajo se potrebe po generacijski menjavi v društvu, podobno kot je pri številnih slovenskih društvih (in večini drugih etničnih društev) po svetu: »Želimo, da sodelujejo mladi. Oni morajo delati po svoje, z drugačnimi novimi motivi, morajo se boriti, ohraniti jezik, spoznati kulturo, sonarodnjake in biti ponosni, da imajo dve domovini« (D1). Pri nekaterih društvih je že prišlo do vodenja mlajše generacije, ta pa je uvedla novosti: »Jaz sem začela drugače, naredila sem folklorno sekcijo, orkester za otroke slovenskega porekla, povabila sem jih, tako smo začeli, bolj smo aktivirali planinsko sekcijo. Imela sem drugačno vizijo, da bi privabila mladino« (D3). Nekatera društva že sodelujejo s slovenskimi društvi v drugih državah, npr. v Srbiji (D1) in na Hrvaškem (D3), medtem ko si eno izmed društev (D2) želi, da bi sodelovali tudi z društvi v Italiji, Avstriji.

Dopolnilni pouk slovenskega jezika in kulture

Dve učiteljici (U1, U2) na prvo raziskovalno vprašanje o sodelovanju odgovarjata, da sodelovanje z univerzami poteka občasno in dobro. Ena od njiju (U1) podrobneje pojasnjuje, da jih združujejo »projekti, delavnice, predavanja, kulturni in družabni dogodki«, da sodelujejo »ob obiskih slovenskih avtorjev, literarnih ustvarjalcev, društvo obvesti tudi lektorja, in obratno; sodelovanje poteka preko elektronske pošte, [z lektorico, lektorjem] se obveščava o aktivnostih društva in obratno; menim, da sodelovanje pomeni obogatitev dejavnosti društva in dopolnilnega pouka slovenščine, je pomembno in koristno« (U1).

Kar zadeva sodelovanje z društvi, se ena učiteljica (U1) z njim povezuje izjemoma, saj je društvo o drugih dejavnostih, ki niso neposredno vezane na dopolnilni pouk slovenskega jezika in kulture, ne obvešča, druga učiteljica (U2) pa sodeluje z društvi zelo pogosto. Kot v prvem primeru navaja sodelujoča v raziskavi (U1), prihaja do sodelovanja s slovenskimi društvi »zgolj pri dejavnostih, vezanih na pouk: obiski avtorjev, delavnice, prireditve otrok – ob koncu koledarskega leta, za Prešernov dan, zaključek šolskega leta; društvo v [svoje] ostale aktivnosti skorajda ne vključuje učiteljice niti je posebej ne obvešča o ostalih aktivnostih, npr. pevski zbor, folklor, ostali dogodki, ki niso povezani s poukom«. Druga učiteljica (U2) s slovenskimi društvi, ki delujejo v njenem okrožju poučevanja, sodeluje »zelo dobro«, med dejavnostmi in dogodki, ki jih povezujejo, pa našteje: »Projekti, delavnice, predavanja, kulturni in družabni dogodki, prireditve, proslave, gostovanja ustvarjalcev bralne značke, tabori, srečanja, kvizi otrok, pred korono tudi mednarodni projekti in ekskurzije ter izmenjave učencev s Slovenijo in z drugimi državami na Balkanu.« Med dejavnostmi, ki povezujejo društva in dopolnilni pouk slovenskega jezika in kulture, sodelujoče učenke, učenci (S1–S5) naštevajo letne dogodke in praznovanja, različne mednarodne kulturne projekte, projekte in sodelovanja med ostalimi slovenskimi društvi, folkloro (S2, S3), martinovanje, dan jezikov, prireditve za božič, poletne šole (S4), likovno sekcijo, kuhanje, polstenje, pevski zbor (S5). Nihče od v raziskavi sodelujočih učenk, učencev ne izpostavlja sodelovanja z univerzo.

Pri podvprašanju 1.2 (dogodki, ki se jih udeležujejo v Sloveniji), ena učiteljica izpostavlja prireditve Dobrodošli doma, »kjer je zaželen udeležba učiteljice« (U1), druga (U2) pa »Seminar za učitelje dopolnilnega pouka slovenščine v tujini, Kulturni bazar«. Pri sodelovanju z drugimi slovenskimi organizacijami je izpostavljeno še »sodelovanje z matično šolo in drugimi šolami (prej, v okviru mednarodnih izmenjav), z Društvom Bralna značka Slovenije – ZPMS, s CŠOD-jem« (U2). Pri sodelovanju s Slovenijo obe učiteljici (U1, U2) izpostavljata dobro sodelovanje z Ministrstvom za izobraževanje, znanost in šport, z Zavodom RS za šolstvo¹⁷ ter s Centrom za slovenščino kot drugi in tuji jezik Univerze v Ljubljani, ki »na seminarjih vsako leto izobražuje in strokovno usposablja« (U1). Učenke, učenci dopolnilnega

17 Mesečna poročila, izobraževanje 5 dni na leto (U1).

pouka slovenskega jezika in kulture (S1–S5) med obiski Slovenije izpostavljajo poletno šolo slovenščine (S1), prireditve Dobrodošli doma in vaje za folkloro (S2, S4) ter meddržavne in medkulturne projekte, npr. Združeni v različnosti (Brežice, 2018), Dobrodošli doma (Radovljica, 2019) in mednarodno konferenco Evropa je naš dom (Novo mesto, 2021) (S3).

Na podvprašanje 1.3 (motivacija za obiskovanje dopolnilnega pouka slovenskega jezika in kulture) večinoma odgovarjajo, da imajo prednice, prednike ali sorodnice, sorodnike v Sloveniji (S1, S2, S3, S5), zaradi česar se »želijo učiti slovenskega jezika in tradicije« (S1), saj pri pouku spoznavajo slovensko kulturo in različne zanimivosti ter tudi tako ohranjajo stik s Slovenijo (S2, S3). Ena udeleženka (S4) je zapisala, da se želi naučiti slovensko, da bi imela možnost študija v Sloveniji, druga (S5), ki ima babico iz Slovenije in je Slovenijo »vedno videla kot svojo domovino«, si želi, da bi v Sloveniji študirali njeni otroci. Vse učenke in učenci (S1–S5), ki so dogovorili na vprašalnik, so aktivni v vsaj enem od slovenskih društev v Bosni in Hercegovini, prav tako njihove sorodnice in sorodniki, pa naj bodo to otroci (S5) ali »starši in dedek«, ki želijo, da »tudi jaz sodelujem na dogodkih in otroških delavnicah« (S1). Navajajo, da dopolnilni pouk slovenskega jezika in kulture poteka enkrat tedensko, da je »zanimiv« (S1), da so z njim »zelo zadovoljni« (S2, S3) ter da je učiteljica »odlična in nam uspešno posreduje svoje znanje ter nam približuje slovensko kulturo in tradicijo« (S5).

Pri odgovoru na drugo raziskovalno vprašanje, ki se nanaša na izzive sodelovanja, ena učiteljica (U1) izpostavlja nesporazume pri sodelovanju z nekaterimi društvi: »Mislim, da društvu ni povsem jasno, da je delodajalec učiteljice ministrstvo in da učiteljica ni last društva. Prav tako se zgodi, da predsednik društva odloča, kdo lahko obiskuje pouk, nekateri obisk pouka pogojujejo s članstvom v društvu.« Druga učiteljica (U2) pa je kot izzive pri poučevanju naštetla starostno in po predznanju raznolike skupine, prostorske pogoje (ogrevanje, internet, projektor) ter izzive pri sestavi urnika zaradi dvoizmenskega pouka.

Dopolnilni pouk v času pandemije koronavirusa

»Covid je bil kot bomba, prekinil je številne stike« (D4), so negativne posledice pandemije koronavirusa opisali v enem od društev. Za dodatna pojasnila o izzivih poučevanja v času epidemije koronavirusa sva se obrnila na učiteljico dopolnilnega pouka slovenskega jezika in kulture Barbaro Hanuš (2022). Ta konec leta 2022 sicer ni več poučevala v Bosni in Hercegovini, je pa v Banjaluki, Slatini, Prijedoru in Tesliču poučevala dopolnilni pouk devet let (med šolskima letoma 2012/13 in 2021/22). Pandemija koronavirusa ni ključno posegla le v načine izobraževanja v slovenskih vzgojno-izobraževalnih organizacijah (Kalin et al., 2021; Gril et al., 2022), temveč tudi v organizacijo in izvedbo dopolnilnega pouka slovenskega jezika in kulture za izseljene Slovenke, Slovence ter njihove potomke, potomce po svetu. Prej redka oblika poučevanja na daljavo je postala nova realnost.

Število skupin, v katerih je potekal pouk, je tako v šolskem letu 2014/15 kot v šolskem letu 2020/21 ostalo enako (11), zmanjšalo pa se je število udeleženk, udeležencev (s 111 na 80). Delo na daljavo je, tako kot v Sloveniji (Žmavc et al., 2020), prineslo prilagojen pouk: »Pri delu na daljavo smo urnik prilagodili. Srečanja po Zoomu sem imela tudi za dva, tri učence, ki se niso mogli pridružiti svoji skupini. Z osnovnošolci in nekaterimi odraslimi smo se srečevali vsak teden, z drugimi pa smo se dogovorili, da jim en teden pošljem delovni list, naslednji teden pa smo imeli uro na Zoomu,« je opisala prilagoditve Barbara Hanuš (2022).

Učiteljica je zaznavala individualne razlike med svojimi učenkami, učenci. Tako kot so pri poučevanju v slovenskem okolju ugotovile Jana Kalin, Klara Skubic Ermenc in Jasna Mažgon (Kalin et al. 2021, str. 144), je tudi Barbara Hanuš potrdila, da je nekaterim delo na daljavo bolj ustrezalo kot običajno delo: »Meni se je zdelo pomembno, da ni bilo osipa med osnovnošolci. A starost ni vplivala na to, ali bo nekdo nadaljeval z učenjem ali ne. Pri nekaterih je bila vzrok bolezen v družini, mladostniki in učitelji so bili zelo obremenjeni z delom za šolo. Nekaj jih je bilo, ki so povedali, da so doslej prihajali zaradi druženja in ne zaradi učenja, zato se ne bodo redno odzivali« (Hanus, 2022).

Običajnemu gradivu za poučevanje (učbeniki, delovni listi, ki jih je učiteljica pripravila sama, slovenske revije za otroke, odrasle) je učiteljica v času dela na daljavo dodala interaktivne vsebine: »Slovenske knjižnice so vsem omogočile brezplačno izposajo elektronskih knjig. Slovenski filmski center je omogočal brezplačen ogled slovenskih filmov. Gledališča so objavila svoje predstave na spletu. Mnogi pisatelji so se oglašali prek svojih spletnih strani, posnetke njihovega pripovedovanja so si ogledali tudi Slovenci v tujini« (Hanus, 2022).

V šolskem letu 2014/15 so imele učiteljice v Bosni in Hercegovini veliko skupnih dejavnosti (kviz, srečanje učencev, martinovanje in druge prireditve). V šolskem letu 2020/21 srečanj v živo ni bilo. Odpadli so potovanja v Slovenijo in prireditev Dobrodošli doma. Medtem ko so pri pouku na daljavo za učenke, učence priseljence v Sloveniji skoraj vse učiteljice, učitelji poročali, »da se z drugimi šolami niso povezovali« (Gril et al., 2022, str. 177), Barbara Hanuš poroča ravno o nasprotnem. Razvilo se je novo sodelovanje med učiteljicami, učitelji dopolnilnega pouka slovenskega jezika in kulture, tudi meddržavno, nadgrajeno je bilo staro in vzpostavljeno novo povezovanje: »Sodelovali smo na različnih natečajih. Ob evropskem dnevu jezikov smo se povezali učitelji iz Švice, [Bosne in Hercegovine], Srbije in Nemčije in pripravili posnetke izštevank v različnih jezikih. Na spletno prireditev Pozdrav pomladi sem povabila bivše učenke, nekdanje učiteljice in lektorice. Sodelovali smo s študenti Univerze na Primorskem« (Hanus, 2022). V prilagojenih razmerah za poučevanje je učiteljica dobila podporo tudi iz Slovenije: »Roman Gruden z Ministrstva za izobraževanje, znanost in šolstvo in Eva Jurman z Zavoda RS za šolstvo sta bila vedno zelo razumevajoča, skupaj z mano sta iskala najboljše rešitve za to obdobje« (Hanus, 2022).

Serijski publikaciji *To smo mi* (2012–2022) in *Bilten* (2011–2024), ki ju izdaja Društvo Slovencev Republike Srbske Triglav Banjaluka (Društvo Slovencev, n.d.),

pričata o raznolikih dejavnostih v okviru dopolnilnega pouka slovenskega jezika in kulture ter društva, o povezovanju med društvom in učiteljico dopolnilnega pouka slovenskega jezika in kulture. Na spletni strani društva so na voljo tudi dvojezične knjižne izdaje, ki jih je izdalo društvo (npr. Papež Adamič, 2009; Hanuš, 2013; Pavček, 2017). Publikacije se lahko uporabljajo kot gradivo pri medkulturnih učnih urah, na katerih razvijamo medkulturno zmožnost vseh učenk in učencev. Z njihovo pomočjo lahko poučujemo o izseljevanju iz Slovenije v Bosno in Hercegovino. Otrokom z drugimi maternimi jeziki v slovenskih šolah lahko omogočimo branje v njihovem maternem jeziku in spregovorimo o priseljevanju v Slovenijo ter o izzivih vključevanja in učenja jezika okolja (Vižintin & Kern, 2022), z dvojezičnim gradivom lahko obogatimo šolske knjižnice. Tudi Barbara Hanuš je avtorica številnih eno-, dvo- ali večjezičnih gradiv, primernih za poučevanje slovenščine, ne le za otroke, ki so potomci slovenskih izseljenk in izseljencev po svetu, ampak tudi za otroke priseljence v Sloveniji za spoznavanje Slovenije in učenje slovenščine kot drugega oz. tujega jezika (npr. Hanuš, 2019; 2020).

V študijskem letu 2023/24 je Barbara Hanuš postala lektorica za slovenski jezik na Filološki fakulteti Univerze v Banjaluki, s tem pa se je spremenila njena ciljna publika. To niso več otroci, (pra)vnukinje in (pra)vnuki izseljenih Slovencev, Slovencev v Bosni in Hercegovini, ampak študentke in študenti. Z novo službo je postala del »razvejane mreže lektoratov in študijev slovenščine po svetu; njihovo število se giblje okoli številke 60, število študentov, ki se vsako leto učijo oziroma študirajo slovenščino na tujih univerzah, pa je preseгло številko 2000« (Center za slovenščino, 2025).

Drugi javni dogodki

Terensko delo med 28. novembrom in 10. decembrom 2022 je poleg dogovorjenih obiskov in intervjujev vključevalo tudi udeležbo na treh javnih dogodkih, ki prvotno ni bila načrtovana: na enem v Banjaluki in na dveh v Sarajevu. Ti dogodki so dodatno potrdili ugotovitve o medsebojnem sodelovanju, podpori drug drugemu pri organizaciji ter skupnem obiskovanju slovenskih kulturnih prireditev med preučevanimi akterji v Bosni in Hercegovini.

V Banjaluki je bila v času terenskega dela organizirana predstavitev knjige Barbare Hanuš (2022) v slovensko-srbski izdaji *Uz Kafu = Kavni krog*. Zbirko kratkih zgodb je v srbsčino prevedla Biljana Babić, ki je s pisateljico tudi vodila pogovor. Literarni večer, ki je bil organiziran 1. decembra 2022 v Hebrejskem kulturnem centru, so obiskali članice, člani društva Triglav Banjaluka, učiteljica dopolnilnega pouka slovenskega jezika in kulture, nekdanje in zdajšnje učenke in učenci dopolnilnega pouka slovenskega jezika in kulture iz Banjaluke in Slatine, lektor s študentkami in študenti, ki se v okviru lektorata učijo slovensko, ter druge prijateljice, prijatelji slovenske kulture v Bosni in Hercegovini.

V Sarajevu sta potekala dva dogodka, eden na Univerzi v Sarajevu in drugi na slovenskem veleposlaništvu. V okviru Svetovnih dnevor slovenske literature 6. 12. 2022

je Univerza v Sarajevu gostila predavanji Alojzije Zupan Sosič in Mateje Pezdirc Bartol z Univerze v Ljubljani. Predavanj se niso udeležile le študentke in študenti, ki se učijo slovenščino na univerzi, ampak tudi druge študentke in študenti FF UNSA, ki so to želeli, članice in člani društva Cankar iz Sarajeva, učiteljica dopolnilnega pouka slovenskega jezika in kulture z učenkami, učenci ter slovenski veleposlanik Damijan Sedar. V rezidenci slednjega je bil 8. 12. 2022 organiziran novoletni sprejem, na katerega so bile poleg zaposlenih na veleposlaništvu povabljene predstavnice in predstavniki slovenskih društev, učiteljice dopolnilnega pouka slovenskega jezika in kulture, lektorja z univerz, slovenske podjetnice in podjetniki, delujoči v Bosni in Hercegovini, ter druge prijateljice, prijatelji slovenske kulture iz Bosne in Hercegovine. Decembra 2022 je veleposlanik odprl tudi nove prostore slovenskega društva Lipa Prijedor, za katere je imel tudi sam pomembne zasluge.

ZAKLJUČEK

Potomke in potomci slovenskih izseljenk, izseljencev v Bosno in Hercegovino ponosno ohranjajo jezik in kulturo svojih prednic, prednikov iz Slovenije v okviru slovenskih društev in dopolnilnega pouka slovenskega jezika in kulture. Za svoje otroke in vnukinje, vnuke vidijo nekateri boljšo prihodnost v Sloveniji, a sočasno njihovo izseljevanje v Slovenijo otežuje pomlajevanje slovenskih društev v Bosni in Hercegovini. Učenje slovenskega jezika na dveh bosansko-hercegovskih univerzah, prav tako finančno podprto iz Slovenije, večinoma ni povezano s prednicami, predniki iz Slovenije, a po izjavah sodelujočih študentk, študentov prav tako odpira vrata v Slovenijo. Na drugi strani dejavnosti univerz, društev in učiteljic dopolnilnega pouka prispevajo k povezovanju in sodelovanju med obema državama ter h kulturnemu in družbenemu življenju v Bosni in Hercegovini.

Na področju učenja slovenskega jezika in ohranjanja slovenske kulture v Bosni in Hercegovini deluje več deležnikov, in sicer na univerzitetni ravni (lektorati slovenščine), v okviru dopolnilnega pouka slovenskega jezika in kulture ter v okviru slovenskih društev. V prispevku sva se osredotočila na preučevanje sodelovanja med njimi. Sodelovanje predstavnic, predstavnikov, ki delujejo na univerzitetni ravni, z lokalnimi slovenskimi društvi je v veliki meri odvisno od angažmaja lektorice, lektorja oz. deloma tudi od ureditve njenega oz. njegovega statusa (če lektorat izvajajo osebe, ki so nastanjene v mestu izvajanja pouka slovenščine, je načeloma večja tudi motivacija za sodelovanje z društvi in organizacijo dodatnih aktivnosti). Sodelovanje z učiteljico oz. učiteljem dopolnilnega pouka je v posameznih primerih zgledno, sicer pa večinoma temelji na vzajemnem obveščanju o dogodkih. Analiza intervjujev je pokazala, da se študentke, študenti za učenje slovenskega jezika na univerzitetni ravni odločajo zlasti zaradi želje po nadaljevanju študija v Sloveniji, po učenju tujega jezika in po delu in življenju v Sloveniji. Motivacija za obiskovanje dopolnilnega pouka pa je povezana s samim dejstvom, da kdo od članic, članov

družine prihaja iz Slovenije. Učenke, učenci dopolnilnega pouka večinoma tesno sodelujejo s slovenskimi društvi, sodelovanja z univerzo sodelujoči ne omenjajo. Učiteljici dopolnilnega pouka izpostavljata zgledno sodelovanje z Ministrstvom za izobraževanje, znanost in šport, z Zavodom za šolstvo RS, s Centrom za slovenščino kot drugi in tuji jezik Univerze v Ljubljani, z nekaterimi šolami v Sloveniji ter z Društvom Bralna značka Slovenije.

Raziskava, opravljena leta 2022 v Bosni in Hercegovini, prinaša pomembnem vpogled v procese učenja in ohranjanja slovenskega jezika in kulture med slovenskimi izseljenkami, izseljenci, njihovimi potomkami, potomci ter študentkami, študenti slovenščine v tej državi. Prikaže tudi delovanje dopolnilnega pouka slovenskega jezika in kulture v času pandemije koronavirusa ter posledice, ki ga je imela slednja na delovanje slovenskih društev, saj je leta 2022 v Bosni in Hercegovini delovalo le še sedem slovenskih društev.

Slovenska društva z učiteljicami dopolnilnega pouka slovenskega jezika in kulture večinoma sodelujejo »izredno dobro,« zavedajoč se, da ne gre samo za ohranjanje in učenje slovenskega jezika, ampak da je pomembno tudi »spoznavanje slovenske kulture,« kot navaja eno od sodelujočih društev (D1). Društva obeležujejo več slovenskih praznikov in izvajajo različne dejavnosti v okviru sekcij: glasbene, plesne, likovne, literarne, planinske in druge, berejo za bralno značko, obeležujejo svetovni dan čebel, pomemben praznik je tudi martinovanje. Prav vsa sodelujoča društva podpirajo dopolnilni pouk slovenskega jezika in kulture ter meddruštveno sodelovanje, potekajo tudi številna povezovanja s Slovenijo. Med izzivi, ki jih izpostavljajo društva, je vprašanje lokacije poučevanja dopolnilnega pouka slovenskega jezika in kulture – če to ne poteka več v društvenih prostorih, imajo otroci sicer boljše pogoje za učenje, a jih to obenem oddaljuje od društvenih dejavnosti. Drugi izpostavljeni izziv je prehod društvenih dejavnosti na mlajšo generacijo, ki ga otežuje tudi odhajanje mladih v Slovenijo in druge države. Tako društva kot učiteljice dopolnilnega pouka slovenskega jezika in kulture so izpostavili izjemno uspešno sodelovanje s slovenskim veleposlaništvom v Sarajevu.

ZAHVALE IN DRUGI PODATKI

Članek je nastal v okviru bilateralnega projekta »Potomci slovenskih izseljencev ter ohranjanje slovenskega jezika v Bosni in Hercegovini« (BI-BA/21-23-018) ter programskih skupin »Narodna in kulturna identiteta slovenskega izseljenstva v kontekstu raziskovanja migracij« (P5-0070) in »Slovenski jezik v sinhronem in diahronem razvoju« (P6-0038), ki jih financirajo Javna agencija za znanstvenoraziskovalno in inovacijsko dejavnost Republike Slovenije; Ministrstvo za znanost in tehnološki razvoj, visoko šolstvo in informacijsko družbo Republike Srbske, Bosna in Hercegovina; ZRC SAZU; Univerza v Banjaluki.

Avtorja se zahvaljujeva vsem sodelujočim v raziskavi. Članek temelji na raziskovalnem gradivu, ki ni opredeljeno kot zbirka raziskovalnih podatkov. Raziskovalni podatki so hranjeni na Inštitutu za slovensko izseljenstvo in migracije ZRC SAZU.

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SUMMARY

LEARNING THE SLOVENIAN LANGUAGE AND PRESERVING SLOVENIAN CULTURE IN BOSNIA AND HERZEGOVINA

Boris Kern, Marijanca Ajša Vižintin

Relations between the Republic of Slovenia and Bosnia and Herzegovina are close, due to a rich history of migration between the two countries. As a result, organized Slovenian cultural associations and supplementary classes in the Slovenian language and culture have a long tradition. These initiatives were not only introduced in the independent Republic of Slovenia but were also supported by state authorities and/or the host country to which Slovenian emigrants moved, both during the interwar period of the 20th century and post–World War II.

The war in the 1990s marked a turning point in teaching and learning the Slovenian language and culture in Bosnia and Herzegovina. For almost twenty years afterward, it was not possible to study Slovenian at the university level. The first Slovenian language lectureship was established at the private Pan-European University in Banja Luka in 2010, followed by one at the University of Sarajevo in the 2015/16 academic year, and finally at the University of Banja Luka in the 2018/19 academic year. In recent years, the number of Slovenian language lectureships has decreased to two, and the number of Slovenian cultural associations has declined from ten in 2014 to seven in 2022. However, the number of teachers providing supplementary classes in the Slovenian language and culture has remained unchanged at three, with the teachers working across eight different locations.

Collaboration between representatives working at the university level and local Slovenian cultural associations largely depends on the initiative of the Slovenian language lecturer and, to some extent, on the lecturer's employment status. Cooperation with teachers of supplementary classes is exemplary in some cases, but is primarily limited to the mutual sharing of information about events. Interestingly, none of the students attending supplementary classes mentioned any collaboration with the universities. However, there is closer cooperation between Slovenian cultural associations in the context of various celebrations, cultural projects, summer language and art schools, and choir performances. Additionally, teachers of supplementary classes highlighted very good cooperation with the Ministry of Education, Science, and Sport, the National Education Institute of the Republic of Slovenia, the Centre for Slovene as a Second/Foreign Language at the University of Ljubljana, some schools in Slovenia, and the Reading Badge Society of Slovenia.

Slovenian cultural associations mostly work very well with teachers of supplementary Slovenian language and culture classes. All participating associations support the supplementary teaching of the Slovenian language and culture; among all cultural associations in Bosnia and Herzegovina, there are many ongoing cooperation activities with Slovenia. The associations highlighted the location of

supplementary teaching of the Slovenian language and culture as being one of the challenges. When classes are no longer held in the association's premises, the children may have better conditions for learning, but this also distances them from the association's activities. Another challenge is the transition of the association's activities to the younger generation, which is complicated by the fact that many young people are leaving for Slovenia and other countries. Both the associations and the teachers of supplementary Slovenian language and culture classes highlighted the very successful cooperation with the Slovenian Embassy in Sarajevo.

SREČANJA S KOLONIALNO BOSNO: SLOVENSKI POGLEDI MED EVROPSKO SUPERIORNOSTJO IN (JUGO)SLOVANSKO DOMAČNOSTJO

Jaroš Krivec¹

COBISS: 1.01

IZVLEČEK

Srečanja s kolonialno Bosno: Slovenski pogledi med evropsko superiornostjo in (jugo)slovansko domačnostjo

Avtor v prispevku analizira slovensko literarno tematizacijo Bosne in Hercegovine za časa avstro-ogrske monarhije. Priseljenci, tudi Slovenci, so v Bosni zasedali številne vloge, ki so bile v marsičem podobne tistim, ki so jih prebivalci zahodne Evrope igrali v izvenevropskih kolonijah. Tipične kolonialne prakse, kot sta npr. segregacija in hierarhizacija kultur, so bile lucidno identificirane in s strani nekaterih avtorjev tudi kritizirane. Pisatelji so se v soočanju z Drugim dojemali kot del superiorne evropske civilizacije, v katero se je lahko, ob izključevanju »divjega azijskega Turka«, vpisoval tudi (jugo)slovanski imaginarij. Ta element (jugo)slovanske inkluzivnosti se je pri nekaterih avtorjih izražal skozi specifično (jugo)slovansko domačnost.

KLJUČNE BESEDE: evrocentrizem, kolonializem, (jugo)slovanstvo, slovenski izseljenci in popotniki, avstro-ogrska monarhija

ABSTRACT

Encounters With Colonial Bosnia: Slovenian Views Between European Superiority and (South-)Slavic Familiarity

The article examines the Slovenian literary thematization of Bosnia and Herzegovina during the Austro-Hungarian monarchy. Immigrants, including Slovenians, played various roles in Bosnia that were, in many ways, similar to those played by Western Europeans in non-European colonies. Typical colonial practices such as segregation and the hierarchization of cultures were lucidly identified and criticized by some authors. In confronting the Other, writers perceived themselves as a part of a superior European civilization, in which, to the exclusion of the "savage Asian Turk," the (South-)Slavic imaginary could also be inscribed. Some authors expressed this element of (South-)Slavic inclusiveness through a specific (South-)Slavic familiarity.

KEYWORDS: Eurocentrism, colonialism, (south) Slavism, Slovenian emigrants and travelers, Austro-Hungarian monarchy

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UVOD

13. junija 1878 je avstro-ogrška monarhija na berlinskem kongresu, ki je bil posvečen reševanju t. i. »balkanske krize«, s strani velikih sil dobila mandat, da z vojaškim pohodom okupira takrat še osmansko provinco Bosno in Hercegovino.¹ Že povsem na začetku avstrijske imperialne zgodbe v Bosni pa so svojo vlogo odigrali tudi Slovenci, saj je »v okupacijski vojski sodeloval velik bròj tedanjih vojakov iz pokrajnin slovenskih« (Svetek, 1888, str. 430).² Nekateri izmed njih so se, poleg številnih novih izseljencev ali obiskovalcev, kasneje za krajši ali daljši čas vrnili v Bosno in tam izpolnjevali različne vloge. Slovenski posamezniki, ki so se odpravili v Bosno, so se pogosto naslonili na jezikovne vezi, ki so jim predstavljale varen pristan. Iz različnih virov je razvidno, kako pomemben je bil jezik za slovensko nacionalno identifikacijo v tujini. Kljub razrednim oz. poklicnim razlikam je lahko namreč vzpostavil nekakšno emocionalno solidarnost in občutek skupne pripadnosti (Podlimbarski, 1913, str. 148, 78; Wester, 1910a, str. 609–610).³ Marija Kmet je tako leta 1914 v *Ljubljanskem zvonu* objavila tekst z naslovom »Iz Bosne«; tja jo je gnala radovednost, a dostopa do tujosti in drugačnosti »dobrih in neumnih ljudi«, podobno kot Zofka Kveder, ni iskala v neposrednem kontaktu z lokalnim prebivalstvom, ampak preko neke posredne (varnejše) domačnosti in navajenosti, in sicer preko popolnoma neznanih, a očitno dovolj domačih Slovencev (Kmet, 1914, str. 216, 218). To med drugim kaže tudi na to, da se je v tujini najprej identificirala kot Slovenka. V tem občutenju očitno ni bila edina:

Res je imel prav oni doktor, ki mi je pravil na ladji, kako zapuščene se čutijo naši ljudje v Bosni. Vedno so govorili o »naših krajih«, naših navadah in kdaj in kako se nekoč povrnejo spet v domovino. [...] Čudno jim je, privaditi se pač ne morejo bosanskemu življenju, ki je popolnoma drugačno kot pri nas (Kmet, 1914, str. 219).⁴

Tudi v romanu *Gospodin Franjo* je mogoče najti primer srečanja Slovencev, ki so se odselili v Bosno. Dejstvo, da je scena prikazana v intimnih prostorih družinskega bivališča, in ne v neki gostilni ali na kakšnem drugem javnem prostoru, kaže na spontano bližino in zaupanje, ki se vzpostavlja med pripadniki slovenske jezikovne skupnosti na tujem (Podlimbarski, 1913, str. 103). Jezik v tem srečanju tudi sicer hitro pride v ospredje pogovora in deluje kot sredstvo identifikacije, ki povezuje ožjo slovensko in tudi širšo jugoslovansko skupnost ter hkrati služi kot element jasne razmejitve z

1 V nadaljevanju tudi »BiH« ali »Bosna« kot sopomenki.

2 O slovenskem prizadevanju za »osvoboditev« Bosne gl. Melik, 1977; Melik, 1979, str. 246–248; Luković, 1977, str. 338; Stergar, 2004, str. 136–137.

3 Podobno velja za premostitev deželnih identifikacij in vzpostavljanje širše slovenske povezanosti. Za več o tem gl. Kaš (1883a, str. 90).

4 O domotožju po »slovenskem domu« gl. Wester, 1915, str. 88.

nemščino, ki »toliko, da zadošča za vsakdanji kruh in za vse tisto, kar s srcem nima opraviti« (Podlimbarski, 1913, str. 105–106).⁵

Nakazana primera pisanja Marije Kmet in Podlimbarskega vsebujeta nekatere ključne elemente, ki se jim bomo posvetili v nadaljevanju prispevka. V prvem sklopu bodo najprej predstavljene vloge izseljencev v Bosni in Hercegovini in protikolonialna kritika slednjih. Kot kaže primer Marije Kmet, so slovenski pisatelji zaznavali določeno segregacijo priseljencev in domačinov. V drugem sklopu se bomo posvetili slovenski literarni tematizaciji in kritiki te tipične polarne razdeljenosti kolonialnega sveta, predvsem z opisovanjem kazine kot segregacijskega prostora, kjer se je – presenetljivo podobno angleški kolonialni instituciji kluba (angl. *club*) – izražala izrazita kolonialna hierarhija kultur.⁶ V tretjem koraku pa bomo analizirali evrocetrično samopotrjevanje skozi izražanje kulturnih razlik in evropsko oz. zahodno samoidentificiranje, v okviru katerega pa je lahko deloval tudi (jugo)slovanski imaginarij. Zgoraj predstavljeni primer Podlimbarskega je prav tako nakazal, da je bil poleg izključevanja in zaničevanja pri nekaterih slovenskih avtorjih prisoten tudi element inkluzivnosti, ki so ga izražali z (jugo)slovansko domačnostjo, ki je lahko izkazovala izrazito multikulturnost. Tema zadnjega sklopa pa bo prikazovanje »zapad[a] in vzhod[a] v najboljšem medsebojnem sporazumu« (Wester, 1910a, str. 608–609).

V zadnjih dveh desetletjih se je v evropski humanistiki izrazilo povečal interes raziskovalcev za preučevanje Balkana skozi prizmo postkolonialnih študij. Ključna dela, kot je *Inventing Ruritania* Vesne Goldsworthy (1998), ki analizira britanske literarne konstrukcije Balkana kot eksotičnega prostora, ter študija Stijna Vervaeta (Vervaet, 2009) o bosanski literaturi pod avstro-ogrsko oblastjo, so pokazala, kako kulturne reprezentacije prispevajo k oblikovanju nacionalnih identitet in percepcij Drugega. Pomembno vlogo ima tudi Clemens Ruthner (2018), ki je postkolonialni pristop uporabil pri analizi Avstro-Ogrske v obdobju 1878–1918, zlasti v povezavi z Bosno in Hercegovino. Med pomembne pobude na tem področju sodita projekta *Kakanien Revisited* in graški SFB Moderne, ki se na različne načine ukvarjata z vprašanji reprezentacije Balkana, kolonializma in identitetnih konstrukcij v habsburškem prostoru. V prelomne zborniku *Habsburg postcolonial: Machtstrukturen und kollektives Gedächtnis* (Feichtinger et al., 2003) je bil uveden koncept »notranje kolonizacije« za analizo razmerij moči in kolektivnega spomina v večetnični monarhiji, s posebnim poudarkom na Bosni in Hercegovini. V slovenskem znanstvenem prostoru se vse bolj uveljavlja spoznanje, da odnos do Balkana vključuje elemente kolonialne distance, evrocetriзма in konstrukcije Drugega. *Zbornik postkolonialnih študij* (Jeffs, 2007) uvaja sodobne postkolonialne pristope v slovenski kontekst. Tina Palač (2021) opozarja na ambivalentnost slovenskega postkolonialnega položaja, Anja

5 V edini slovenski koloniji v BiH je bil pouk za otroke v srbohrvaščini, kar pa za priseljence naj ne bi predstavljalo problema. Za več o tem gl. Sarić & Štimac, 2010, str. 402.

6 Več o kolonializmu kot kulturnem pojavu, katerega bistvo je argument kulturne razlike, gl. Osterhammel & Jansen, 2017, str. 19–20. Več o označevanju habsburške BiH kot kolonije ali semikolonije gl. Krivec (2023, str. 69–70).

Polajnar (2020) analizira reprezentacije Afrike v 19. stoletju, Božidar Jezernik (2004) pa preučuje percepcije Balkana v zahodnoevropskih diskurzih. Jaroš Krivec (2023; 2024) v svojih prispevkih poudarja aktivno vlogo slovenskega oblastnega diskurza v habsburškem kontekstu, antropološki pogled pa dopolnjujeta Bojan Baskar (2008; 2015) in Alenka Bartulović (2010; 2022).

V tem prispevku zapolnjujemo raziskovalno vrzel na presečišču postkolonialnih študij in slovenske kulturne zgodovine z analizo slovenske literarne tematizacije Bosne v času Avstro-Ogrske z vidika kolonialnih in protikolonialnih diskurzov. Slovensko izkušnjo umestimo v širši evropski kontekst kolonialnih praks ter tako presegamo ustaljene nacionalno-zgodovinske okvire. Ob tem razkrivamo prostor za protikolonialne glasove tudi znotraj kolonialnega diskurza in ponudimo bolj niansirano sliko slovenskih pogledov. S tem prispevamo k raznolikemu razumevanju kulturne preteklosti ter dodajamo svoj kamenček v kompleksni mozaik slovenske literarne in kulturne izkušnje tega obdobja. Pri tem ne ponujamo univerzalnih ali izključujočih trditev, temveč želimo usmeriti pozornost na specifičen in v slovenskem zgodovino-pisju doslej pogosto zapostavljen vidik literarne tradicije. Metodološko se opiramo na postkolonialne študije in na kulturnozgodovinski pristop, ki omogočata orodja za analizo slovenske literarne obravnave Bosne v času Avstro-Ogrske.⁷ Viri, analizirani v članku, so javno objavljena besedila slovenskih raziskovalnih popotnikov ter pisateljev iz obdobja Avstro-Ogrske, ki so do določene mere sooblikovala in hkrati odražala javno mnenje. Izbor virov torej med drugimi temelji na njihovi dostopnosti širši javnosti in na družbeno-političnem učinku, ki so ga imeli v času dvojne monarhije. Takšno relevantnost nenazadnje potrjuje tudi primer cenzure romana *Gospodin Franjo*. Poleg tega romana pa gre predvsem za potopisno literaturo, spomine, črtice ter časopisne in revijalne prispevke, ki so izhajali v vodilnih slovenskih publikacijah tistega časa, kot so *Ljubljanski zvon*, *Kres* in *Slovan*. Ob dveh mlajših pisateljicah s Kranjske, Mariji Kmet in Zofki Kveder Jelovšek, ki sta na začetku 20. stoletja obiskali Bosno in o njej tudi pisali, so obravnavani tudi prispevki, ki so jih ustvarili kranjski in štajerski častniki, pisatelji ter učitelji, med njimi Franc Hubad, Igo Kaš, Fran Maselj Podlimbarski, Janko Pajk, Rajko Peruško, Jakob Sket, Anton Svetek in Josip Wester. Večina teh avtorjev, rojenih okoli leta 1850, se je leta 1878 udeležila vojaškega pohoda v Bosno, o katerem so ob koncu stoletja ter ob različnih obletnicah tudi pisali in javno objavljali.

V štirih vsebinskih sklopih prispevka s pomočjo kulturnozgodovinskega pristopa analiziramo slovensko literarno tematizacijo naslednjih vprašanj: (1) vloga slovenskih priseljencev v okupirani Bosni, (2) tipične kolonialne prakse, kot sta segregacija in hierarhizacija kultur, (3) diskurzi evrocentrične superiornosti ter (4) konceptualizacija jugoslovanske domačnosti.

7 Za kulturnozgodovinsko perspektivo gl. Landwehr, 2013. Zaradi specifičnega položaja Bosne v habsburški monarhiji v dobi imperijev in posebnega slovenskega odnosa do te nove »pridobitve« je pri analizi uporaben tudi postkolonialni pristop (gl. Krivec, 2023, str.81–82).

VLOGE PRISELJENCEV V OKUPIRANI BOSNI

Poleg udeležbe na vojaškem pohodu so Slovenci v Bosno odhajali tudi kot kmetovalci (kolonisti), obrtniki in trgovci in so tam »sodelovali na vseh področjih življenja in dela avstro-ogrske države« (Sarić & Štimac, 2010, str. 402; gl. tudi Kržišnik - Bukić, 2007; Josipovič, 2012).⁸ Tako je na primer Rajko Perušek po tem, ko je že sodeloval pri okupaciji, pričel tudi s službo profesorja na sarajevski gimnaziji. Ko je v zbornici spoznal svoje nove kolege, je zapisal: »Tamkaj najdem nekaj po naše oblečenih tovarišev, katere je zanesel veter iz različnih krajev države naše, da bi mladim Bošnjakom vtepali znanost v glavo« (Perušek, 1891, str. 288). V avstrijsko kulturno in identitetno politiko v Bosni tako niso bili vključeni samo veliki akterji in državne avtoritete, ampak tudi periferni in »nedominantni«, predvsem slovanski, narodi monarhije.⁹ Svojo vlogo pri kolonialnem podvigu Avstrije je tako npr. igrala tudi slovenska slikarka Ivana Kobilca. V svojem sarajevskem obdobju so ji vsekakor koristile imperialne strategije lokalnih oblasti, ki so »spodbujale upodabljanje lokalnega prebivalstva, običajev in noše, saj so želele spremeniti javno podobo nekoč sovražnih in nedostopnih dežel« (Kobilca, 2018, str. 47). Po tem, ko je nekaj časa »s kolegi potovala po Bosni in upodabljala folklorne motive za revijo *Nada*, ki je bila ustanovljena z namenom krepitev bošnjaške zavesti in izničenja vpliva sosednje Srbije in Hrvaške,« je leta 1901 na Dunaju izšla *Bildermappe des Sarajewoer Maler-Clubs*, ki je odšla na potujočo razstavo po vsej Evropi (Kobilca, 2018, str. 25–26, 47). Še istega leta pa je Kobilca svoj pečat pustila tudi v enciklopedičnem zvezku monumentalne serije *Kronprinzenwerk*, posvečenemu BiH (Kobilca, 2018, str. 47).

Eden ključnih avtorjev, ki je v svojem romanu *Gospodin Franjo* skozi literarni lik Franja Vilerja podal dragocene perspektive kolonialne situacije v okupirani Bosni, je vsekakor Fran Maselj - Podlimbarski (1852–1917). Podlimbarski je v obdobju 1885–1889 služil kot poročnik v okolici Tuzle. Ta izkušnja mu je poleg njegovega izleta preko Splita v Mostar leta 1910 služila kot priprava za roman *Gospodin Franjo*, ki je bil kmalu po izbruhu svetovne vojne zaplenjen. Avtor je bil na vojaškem častnem sodišču obtožen veleizdaje in konfiniran v Ober-Hollabrunnu in nato v Pulkavi, kjer je tudi umrl. V njegovem pisanju je zaznati izrazito kritičen diskurz, s katerim se odlikuje kot eden najbolj protikolonialnih slovenskih avtorjev tistega obdobja.¹⁰ Iz njegovega pisanja je tako moč razbrati namigovanja na ne najbolj pozitivno vlogo Avstrije v Bosni na pomembnem področju kadrovanja in novih javnih delovnih mest. Slednja so morali, kot z zelo odločnim namigovanjem na ekonomsko izkoriščanje kolonije

8 O gospodarsko-karierni koristi Bosne za Slovence gl. Melik, 1974, str. 276; Luković, 1977, str. 337.

9 Naj spomnim, da so Slovenci zasedali tudi najvišja uradniška mesta, povezana z Bosno. Ivan Žloger je tako kot vodja državnopravnega oddelka (v okviru ministrskega predsedstva) leta 1910 prejel cesarjevo odlikovanje za svoje poglobljeno ukvarjanje s položajem novo osvojene pokrajine. Za več o tem gl. Škrubej, 2019, str. 153.

10 Za več o življenju Frana Maslje Podlimbarskega gl. Koblar, 2013.

zapiše Podlimbarski, do določene mere z davki financirati domačini, pogosto pa so jih zasedali novi priseljenci iz Avstrije, tudi Slovenci (Podlimbarski 1887a, str. 80; Podlimbarski, 1913, str. 191).¹¹ Da je prišlo do neke vrste sprostitev trga dela in delne izmenjave starih (osmanskih) elit z novimi avstrijskimi, nakazuje tudi naslednji dialog iz romana: »Se li močno sele Turki?« »Dosti jih je pobralo šila in kopita. Kje bi dobili vsi uradniki in častniki prostora, da se nam niso ognili Turki!« (Podlimbarski, 1913, str. 107–108; za več o tem gl. Perušek, 1883d, str. 604).¹² Te temo je Podlimbarski sicer kritično obravnaval že leta 1887, ko je v črtici »Markica« za *Ljubljanski zvon* zapisal, da so prišli sodniško službo v »tujco« Bosno opravljat avstrijski Poljaki, ki naj bi skupaj z drugimi priseljenci iz monarhije služili germanizaciji Balkana, saj da »stojijo v švabski službi« (Podlimbarski, 1913, str. 107–108; Podlimbarski, 1887b, str. 525).¹³ Da delovnih mest pogosto niso zasedli domačini, ampak prišleki iz drugih delov monarhije, med drugim tudi iz slovenskih pokrajin, Podlimbarski kritično prikaže z likom Hrena, ki je »študiral par razredov na ljubljanski realki, [...] postal trgovski pomočnik in prišel kmalu po okupaciji v Bosno za davčnega praktikanta« (Podlimbarski, 1913, str. 106),¹⁴ oziroma je, kot pravi na drugem mestu, »po okupaciji odložil meter ter se posvetil kultiviranju zasedenih dežel« (Podlimbarski, 1913, str. 13).¹⁵ Iz iste knjige je razbrati tudi namigovanja na to, da Avstrija v Bosno ni pošiljala ravno najboljših kadrov (Podlimbarski, 1913, str. 253). Kritika, ki jo izraža Podlimbarski, sicer ni usmerjena samo na ozke elite, ampak tudi na širše plasti prebivalstva, ki so v novo provinco odšle iskat svojo srečo: »Kaj pa so kmetijski kolonisti? To so ljudje, ki so živeli v svoji domovini ob beraški palici, bodisi da nikdar niso nič imeli ali pa da so pri slabem gospodarstvu zapravili svojo zemljo – pa hajdi v zasedene dežele širit kulturo!« (Podlimbarski, 1913, str. 58).¹⁶ Številni dokaj dvomni liki naj tako do svojih dobro plačnih služb ne bi prišli zaradi meščansko-uradniških kriterijev požrtvovalne delavnosti za državo, učinkovitosti ali sposobnosti.¹⁷ Prav nasprotno, knjiga opozarja na hipokrizijo novih avstrijskih uradnikov v Bosni, ki se hvalijo kot »kulturonosci«, a so obenem tudi in predvsem prinašalci praks korupcije, klientelizma in nepotizma (Podlimbarski, 1913,

11 O gospodarsko-karierni koristi Bosne za Slovence gl. Melik, 1974, str. 276; Luković, 1977, str. 337.

12 O tem, da so se v prazne turške hiše naseljevali tudi Slovenci, pišeta tudi Sarić & Štimac, (2010, str. 400).

13 Poljaki in Nemci so bili tudi sicer najštevilnejši priseljenci (za več o tem gl. Sarić & Štimac, 2010, str. 402).

14 Glede ugodnosti, ki so jih bili deležni kolonisti, gl. Sarić & Štimac, 2010, str. 402.

15 Oblasti so dopuščale zgodnje nenadzorovano naseljevanje kolonistov, tudi iz slovenskih dežel, z argumentom, da naj bi ti služili domačinom kot vzor za moderno kmetovanje. Za več o tem gl. Sarić & Štimac, 2010, str. 398.

16 O tem, da so se v Bosno preseljevali tudi Slovenci, ki so bili popolnoma brez sredstev, gl. Sarić & Štimac, 2010, str. 403.

17 Takšen primer sta npr. zgodba in lik drvarskega uradnika Bierkopfa (Podlimbarski, 1913, str. 89–90, 459).

str. 9–10; 88).¹⁸ Podlimbarski tako cinično zapiše, da je Bosna »pravzaprav še sultanova pokrajina, kako bi ne bili v navadi vzetki! Blagor mu, kdor sedi pri koritu, ker njegovo bo nebeško kraljestvo!« (Podlimbarski, 1913, str. 69).

SVET, RAZDELJEN NA DVOJE

V nadaljevanju se bomo oprli na enega najbolj znanih in citiranih trditev Frantza Fanona, namreč, da je kolonialen svet v resnici na dvoje razdeljen svet (Fanon, 2010, str. 31). Indice o segregacijskem življenju oz. o obstoju tako imenovanih »evromest« (izv. *Eurotowns*; Raphael, 2014, str. 21), kjer so v nekakšnem paralelnem in od okolice ločenem svetu med sabo živeli Evropejci, je mogoče zaslediti v nekoliko orientalistično obarvanem opisu Sarajeva s strani Zofke Kveder Jelovšek: »Zdi se mi, da so vsi ti, Evropejci, ki žive tu, preveč v svojih ulicah z modernimi dolgočasnimi hišami. In ne mika jih vse to tuje naokrog, ne mika jih to tuje in skrivnostno življenje, ki se skriva ob strani« (Kveder Jelovšek, 1904, str. 99).¹⁹ Razdvojenost, tokrat hercegovskega mesta Mostar, je razbrati tudi iz zapisa Westerja iz leta 1910: »Zvečer pa je prijetno sedeti na hotelskem vrtu, kjer se zbira mostarska družba. Seveda prevladujeta v njej častniška suknja in nemški živelj; zakaj dasi je prenehal v deželi značaj okupacije, vendar bo tudi posihmal tujstvo vsaj v prometnih središčih zavzemalo svoje mesto« (Wester, 1910c, str. 723). Da je bila tudi Bosna na neki način kolonialno razdeljena na dvoje, nakazuje tudi naslednji, tokrat nekoliko bolj kritičen zapis Podlimbarskega:

Štiri dni je Vilar ostal v Sarajevu. Prvi dan je počival ali se izprehajal ob Miljacki, kjer je videl mnogo avstrijske gospode in mnogo preprostih švabskih ljudi, uniformiranih in v civilnih oblekah. [...] Turbani in fesi so se malone izgubili v tem vrvežu tujcev, ker domačini so ostali rajši v svojih hladnih hišah ali so pa čepeli v pestrih dučanih (Podlimbarski, 1913, str. 12).

Podlimbarski v svojem romanu *Gospodin Franjo* prikaže izbrano družbo, ki se, kot se spodobi za meščanske prakse, druži v sebi primernih prostorih, namreč v kazini, »na pustem kazinskem otoku«, in se odlikuje po tem, da se »ne mara priličiti domačemu prebivalstvu« in »namerava na veke ostati sama zase s svojimi šegami in svojim jezikom, ki prav sedaj cinično razpravlja o nekem ženskem vprašanju ali pa o porobi zavojevanega ljudstva« (Podlimbarski, 1913, str. 454). Takšna pripoved precej spominja na angleško institucijo kluba, ki je postal središče etnično in socialno

18 Da »civilizacija očitno ni bila edino darilo, ki ga je Zahod podaril Vzhodu« (Judson, 2018, str. 353), je bilo sicer očitno že na primeru avstrijskega delovanja v Galiciji. O tem, da je bila korupcija v Avstriji »del običajne poslovne prakse liberalnega vladajočega razreda«, gl. tudi Judson, 2018, str. 351.

19 Za definicijo orientalizma v smislu Edvarda Saida gl. Baskar, 2008, str. 24. Za slovenske primere orientaliziranja Bosne gl. Krivec, 2023, str. 70–71.

distanciranega družabnega življenja angleških gentlemanov v Indiji in drugih kolonijah (Osterhammel & Jansen, 2017, str. 95). Podlimbarski skozi celotno besedilo sledi opisovanju te polarne razdeljenosti s pomočjo metafore otoka, pri čemer ta pomeni evropsko kulturo oz. ljudi, ki naj bi jo širili, okoli tega otoka civilizacije pa naj bi se nahajal ocean barbarstva. »V obeh mestih je sedel zvečer v družbi častnikov in uradnikov, ki so se proglašali za nekakšen otok v bosenskem oceanu. Primerjali so Bosno ogromnemu, neobdelanemu in grobemu kamenu, kamor je priroda vbrizgnila večje ali manjše gruče dragocenih kristalov; tem so pripodabljali sebe« (Podlimbarski, 1913, str. 12–13). Takšno izrazito kolonialno predstavo o hierarhiji kultur lucidno prikazuje kot krhko meščansko samoprevaro, ki se v resnici naslanja na strukturno ozadje kolonialne situacije, tj. na vojaško premoč:

Oni ljudje na otoku pravijo, da je pri njih kultura, povsod zunaj otoka pa nekultura. Ta kultura pa se kaže samo v njih oblekah, s katerimi se ponašajo in nadkriljujejo drug drugega, v njih puhlih šalah, praznih zabavah, v njih visokih plačah. Brez pušk in topov bi propadel ves njih družabni red, nastal bi kaos, anarhija (Podlimbarski, 1913, str. 156).

Poskus izstopa iz takšnega okolja ter želja po približevanju in spoznavanju domačinov očitno nista prinašala največjega simbolnega kapitala: »Tretji so ga sovražili, ker se je začel ogibati kazine, tega središča tuzlanskega življenja in nove kulture, četrti niso mogli umeti, kako se more inteligenčen človek bratiti s čuži, posedati po hanih in poslušati dolgočasne guslarje« (Podlimbarski, 1913, str. 374–375). Podlimbarski skozi literarni lik Vilerja povsem odkrito zavrača kulturo takšne družbe: »Zamislil se je v tuzlansko gospodo. Nič mu ni ugajala. V strašni lenobi se pase, služba ji je igrača, ki preganja dolgočasje, razuzdano živi in poleg misli, da je kulturna in vrši imenitno naročilo, izobraža in lika za cesarstvo dve ji izročeni provinciji (Podlimbarski, 1913, str. 53). Pri metafori otoka očitno ni šlo za kakšen položen otok s peščeno plažo, kjer ob valovanju in delovanju plime ter oseke prihaja do nekakšne izmenjave, ampak prej za nekakšen skandinavski otok klifov in fjordov, ob katerega se valovanje vode samo ostro odbija. O tem priča naslednji stavek, ki ga Podlimbarski polaga v usta domačinu Jovici: »Skozi okna svojih kavarn in gostiln zro s preziranjem na našo obleko, štejejo nas k bitjem nižje vrste, celo njih propadle ženske se ošabno smatrajo za zmagovalce in porobitelje Bosne« (Podlimbarski, 1913, str. 191, 198–199). Podlimbarski prikaže situacijo, v kateri priseljenci in domačini pogosto niso živeli najbolj harmonično, ampak prav nasprotno; obe strani naj bi gledali na medsebojen odnos kot na neke vrste trk civilizacij in druga drugo dojemali z veliko nezaupljivostjo:

Temno in mrko je gledal kakor hajduk v šumi, grabil se v dolge lase in trdil, da so Švabi nesreča za srbski narod, ker ga stiskajo in sejejo nemoralnost vanj. [...] Očital nam je našo potratnost, da pohujšujemo narod s svojimi razkošnimi izleti, naše

zabave po gostilnah in kavarnah mu niso bile všeč. Nobena stvar mu ni bila dobra, če je prišla čez Savo. (Podlimbarski, 1913, str. 24)

Podlimbarski v svojem delu torej v izrazito kritičnem protikolonialnem stilu zavrača idejo dominantnosti zahodne kulture, ki jo prikaže kot dekadentno in sprevrženo.²⁰ V besedilu se protagonist Jovica celo odkrito upre domnevni superiornosti zahodnih vrednot in si prizadeva za prepoznanje lastne kulture kot enakopravne (zahodno) evropski. »Iztrebiti se ne pustimo. Ako so izstrebili divjake v Ameriki in naselili tja Evropejce, se da to upravičiti le s stališča evropske sebičnosti; no v Bosni ni divjakov; tu je bilo modro urejeno gospodarstvo že takrat, ko so v Carigradu gospodovali Grki. Od tam smo dobili svojo kulturo, ne s severa, ne od vas« (Podlimbarski, 1913, str. 57).

EVROCENTRIČNA SUPERIORNOST

Znameniti teoretik zamišljenih skupnosti Benedict Anderson je zapisal, da »sanje rasizma pravzaprav izhajajo iz ideologije razreda«. Mehanizem rasizma je lahko stabiliziral razmerja moči: »[D]ejstvo, da so, denimo, angleški lordi naravno superiorni nad drugimi Angleži, ni razlog za skrb, saj so ti drugi Angleži prav tako superiorni nad podrejenimi domorodci« (Anderson, 2007, str. 183). Kolonialni rasizem je torej lahko stabiliziral razredne odnose moči. Tudi tisti, ki je bil še tako nizko na tej hierarhiji razredov, je bil lahko vedno najvišji v kontekstu kolonialne situacije. Ali kot pravi Anderson, rasizem je pripadnikom »velike in male buržoazije omogočil, da so se na stranskem igrišču igrali aristokrate – torej kjerkoli v cesarstvu, samo ne doma« (Anderson, 2007, str. 184). Mehanizem razlike in razmejevanja igra vidno vlogo tudi v Saidovi glavni tezi, namreč da so zahodni literati in znanstveniki ustvarili Orient kot tisto Zahodu Drugo (Said, 1996). Poleg orientalizma poznamo številne podobne diskurze, ki imajo kljub vsej raznolikosti skupno temeljno potezo – slikanje nekega povsem različnega Drugega, v katerega negativu se zrcali lastno zahodno sebstvo (za več o tem gl. Osterhammel & Jansen, 2017, str. 114).²¹ Takšni diskurzi so npr. balkanizem, govor o okcidentalnem svetu (v nasprotju z Jutrovim) in seveda »poudarjanje te domnevne drugačnosti srednje in vzhodne Evrope od Zahoda« (Judson, 2018, str. 12).²² Marsikateri izmed teh diskurzov, ki jih je mogoče razbrati tudi iz analiziranih virov, ima daljšo tradicijo, kar je pokazal že Andre Gingrich s konceptom zakoreninjenih ljudskih predsodkov (Gingrich, 1998; za več o tem gl. Krivec, 2023).

Pri spremembi okolja, torej pri potovanju ali izselitvijo v »tujco« Bosno, so se za nekatere avtorje radikalno spremenila nacionalna, religiozna, jezikovna in oblastna

20 O tem, da so se Bosanci »navzeli od tujcev le slabih razvad, dobrih značajev pa so premalo videli«, gl. Wester, 1910c, str. 723.

21 O tem, da je osmanski svet pogosto »v negativno sfero preslikana opozicija krščanskega Evropejca«, gl. Bartulović 2010, str. 155.

22 Za razmejevanje Evrope od islama gl. Schmale, 2003.

razmerja. Prišlo je torej do konkretne spremembe razmerja moči, zaradi česar se je spremenilo tudi njihovo samorazumevanje (prim. Greiner, 2014, str. 224). Podlimbarski tako lucidno namiguje na to, da se na tujem ne dojemajo več kot dozdevno infantilni hlapci pod »nemškim gospodstvom« in v razmerju do dunajske kulture, ampak sami postanejo superiorni *Kulturnation*, kulturonosci za bosansko prebivalstvo (Podlimbarski, 1913, str. 130; za več o tem gl. Ruthner, 2018, str. 97–98).

V srečanju z dozdevno popolnoma Drugim se pri nekaterih slovenskih avtorjih pojavi občutek kulturne superiornosti in mehanizem primerjanja, v procesu katerega so bili pogosto izraženi in okrepljeni tudi atributi evropskosti. Evropska zavest se pojavi v obliki pripadnosti določenim osebam, neki specifični izobrazbi, vrednotam in normam, ki se lahko odražajo tako v obliki izbire oblačil, ki pripadajo »evropski« modi, kot na primer v vrsti in načinu prehrane (prim. Greiner, 2014, str. 225). Perušek tako tudi prehranske navade jemlje kot tiste zunanje znake, ki kažejo na stopnjo kulture, saj pravi: »Poznata stvar je, da je tudi jelo in pitje v kulturnem razvoji kojega naroda od velike važnosti« (Perušek, 1883a, str. 458–459). Seveda se taka kultura meri z evropskimi oz. zahodnimi standardi, tako da je lahko določen izbor sedenja ali pribora označen kot evropski: »Zvečer rečenega dne podali smo se v stan našega hodže. [...] Za nas, ki tudi svojih črevljev nismo izuli, bile so pripravljene stolice, Turci pa so s podvijenimi nogami sedli okoli, tepsije' v sredi sobe stoječe. [...] Na njej so bile nameščene, kašike' (žlice), za nas, Evropce' tudi noži in vilice« (Perušek, 1883a, str. 461). Kljub temu da Perušek za svoje gostitelje najde tudi pohvalne besede, to slednjim ne pomaga, saj o njih pravi, da še vedno »evropske uglaženosti nima. Po kosilu v društvu riga v znak, da mu je dobro v tek šlo. Ivo mu je neki gospod ponudil cigare, zagrabil je kar vse. Takih stvari bi se mu moglo več očitati, ali zameriti mu jih ne smemo, ker je on pravi Turčin, din-direk (čvrsti stolp turške vere), ki prezira gjaur-ske običaje« (Perušek, 1883c, str. 565).

Hierarhiziranja kulturnih razlik se pri svoji kategorizaciji prebivalstva BiH poslužuje tudi Janko Pajk, ki pravi, da so katoliki »sploh v omiki vsem drugim sprednji [...]». Izpovedniki greko-orientalski so v mnogem oziru bolj zanemarjeni; krivo temu je njihov popovstvo, katero je jako neuko« (Pajk, 1875, str. 130).²³ Domnevna neizobraženost je sicer postala tipičen mehanizem alteritete, skozi katero se je lahko oblikovala tudi predstava lastne superiornosti; Perušek tako poroča, da se tudi sam vrh bosanskega pravoslavlja, namreč »preosvešteni' gospod metropolit ni držal etikete, navadne pri nas zapadnjakih« (Perušek, 1891, str. 286). V nekem trenutku je torej lahko ustvaril binaren svet med Zahodom in Vzhodom, v katerega sedaj spada tako pravoslavni kot muslimanski svet: »Mi seveda imamo drugačne pojme o dostojanstvenosti, nego iztočnjaki, in prepričal sem se pozneje, da so se tudi turški štabski častniki, begi in age, svoj čas tako vedli pri znanih trgovcih« (Perušek, 1891, str. 288). Iz takšnih primerov je razvidno, da drži Sundhaussenova trditev, da ni identitete brez alteritete in da vsak proces identifikacije predpostavlja razlikovanje neke drugačnosti

23 Takšna naracija je skoraj simptomatična: gl. Hubad, 1877, str. 199; Krivec, 2024, str. 20–21.

(Sundhaussen, 1999, str. 628). Prav tako velja spomniti na znamenitega teoretika kolonializma Frantza Fanona, ki je trdil, da je bilo kolonizirano ljudstvo v zahodni literaturi pogosto prikazano kot ljudstvo, ki so mu tuje vse vrednote, vsa etika, vsaka estetika in morala (Fanon, 2010, str. 34). Kot prikazano, se je slovensko pisanje tudi v tej točki vpisovalo v sočasne zahodne literarne trende.²⁴

Petko Lukovič navaja, da je bil časopis *Soča* (med) prvi(mi), ki je pred vstajo leta 1875 slovensko javnost obširneje obvestil o pomembnejših informacijah o Bosni (Lukovič, 1977, str. 51). V omenjenem časopisu je tako mogoče brati, da »z ustaši simpatizira vsak pravicoljuben človek; da, smelo rečemo, skoraj vsa civilizirana Evropa, razen privržnikov, *N. Fr. Pr.* in Ljubljanskega, *Tagblatt*, bolje je, da o teh pretiranih Prusijancih molčimo« (J. V-v., 1875). V citatu so razvidni nekateri zelo zanimivi elementi. Prvič, avtor tega provincialnega časopisa iz Gorice v nasprotju z orientalskim Osmanom sebe vsekakor razume kot del »civilizirane Evrope«. In drugič, očitno ta civiliziran svet ni povsem homogen – avstrijska časopisa, ki sta v nemškem jeziku izhajala eden na Dunaju in drugi v Ljubljani, sta namreč izključena in označena kot »pruska«. Očitno je, da avtor svoje dojemanje dogajanja v tretji državi obravnava skozi optiko domače notranje politike boja med »slovenstvom« in »nemštvom«. V isti številki časopisa gre neki drug avtor celo tako daleč, da domače koncepte in označevalce preslika na neko povsem drugo družbeno stvarnost Bosne. Pri tem je pomenljivo, da kljub mnenju, da je »prebivalstvo Bosne in Hercegovine izključljivo samo jugoslovansko«, avtor »bratske« muslimanske prebivalce vendarle nekako po biološki logiki označuje za neke vrste »nemškutarje«, »ki zaradi materialnega interesa zatirajo majko Slavo in so največji sovražniki svojih bratov« (Kaludjer, 1875, str. 2). V nadaljevanju se, sočasnemu vzdušju nacionalistične obsesije z jezikom primerno, posveti tudi tej temi. Zmožnost uveljavljanja določenega načina komunikacije tako postane znamenje civilizacijske uspešnosti in pripadnosti. Iz premise, da se »po vsej deželi ne sliši drugega jezika, nego srbskega« in se torej »pravi Turk [...] v Bosni poslovani«, doda še zanimivo korelacijsko primerjavo. Pravi namreč, da se, tako kot na Hrvaškem madžarski jezik, tudi v Bosni turški jezik ni mogel ohraniti. Iz tega pa izpelje sklep, da »oba azijska naroda nimata nobene kulture moči in tudi nobene prihodnosti na jutrovem« (Kaludjer, 1875, str. 2).²⁵

Nekateri avtorji so poskušali s pomočjo mehanizmov alteritete in izključevanja utrditi prepričanje, da se tudi (jugo)slovanstvo vpisuje v (zahodno) evropsko civilizacijo. Pri tem so posluževali tudi pripovedovanja o t. i. žalostni zgodovini, ki da si jo ta skupnost deli. Že Marija Todorova (2001) je izpostavila, da je lahko pri gradnji skupnih vezi pomembnejša konstrukcija skupne mučeniške zgodovine kot

24 Pri tem so mišljeni zahodni literarni trendi 19. stoletja, v katerih so bila kolonizirana ljudstva pogosto prikazana kot kulturno in moralno inferiorna (prim. Kipling, Conrad, May; na te trende opozarjata tudi Fanon in Said). Slovensko pisanje o Bosni s poudarjanjem domnevne neizobraženosti in neustreznih vedenjskih norm odraža podobne vzorce hierarhizacije kulturnih razlik.

25 Po mnenju Igorja Grdine »na lestvici nasprotnikov rodoljubov [...] Madžari tesno za petami sledijo odpadnikom (nemškutarjem oziroma nemčurjem)« (Grdina, 2012, str. 42).

pa herojska naracija. Pri tem »izumljanju tradicij« in skupne žalostne preteklosti je seveda treba najti skupnega zunanjega sovražnika, običajno »Turka«, ki ima funkcijo notranjega povezovanja na podlagi zunanje razmejčitve. Za časa hercegovske vstaje leta 1875, torej še pred habsburško okupacijo, so nekateri avtorji šli celo tako daleč, da so priredili znani »srbski« mit o polju Kosovu in ga prenesli na vse člane te zamišljene skupnosti:

Gorje, ki se je rodilo vsem Jugoslovanom brez razločka, stavimo na leto 1356; takrat, ko je kruti Turčin prvokrat stopil pri Helespontu na evropska slovanska tla. V ovem letu se je pričela ona strašna nesreča i beda, ki tlači večino Jugoslovanov v železnem sužništvu še danes. Hude nasledke divje turške sile preteklih stoletij pa čuti vso jugoslovanstvo brez razločka, tudi mi Slovenci. Še pred malo desetletji bili smo tlačeni vsi jednako, od jednega krutega vraga – Turka. (J. V-v., 1875)

Ko se avtor sprašuje po vzrokih tuje vladavine, si skozi usta Nestorja odgovori, da so tega krive »mile lastnosti Slovana«, ki so bile »divjemu Azijatu, Turku, za njegovo ropanje in krviželjno srce prav po godu« (J. V-v., 1875). Osman je prikazan kot nečloveški in zloben Drugi nasproti junaškemu in nedolžnemu Slovnanu: »Kaj je mati Slovanka Turčinu zakrivila, da jej je nježna deca od prsi odtrgal, na komade razsekal ter psom razmetal?« (J. V-v., 1875). Takšne marcialne naracije je moč najti tudi v drugih besedilih, ki so nastala pred okupacijo. Sklepati je mogoče, da naj bi elementi groze, zgodovinsko obarvane solidarnosti in opisovanja Osmanov kot absolutnega zla na bralce delovali proaktivno in pri njih vzbudili občutek, da je treba pristopiti k aktivnemu delovanju in pomoči.²⁶ Zelo podobno naracijo, ki vsebuje elemente skupnega historičnega trpljenja pod nečloveškim sovražnikom, je le dve leti kasneje uporabil tudi Franc Hubad, ko je zapisal, da naj bi, tokrat od bitke pri Mohaču, »krvave zemlje slovanske na jugu, kakor pijavke so pili Osmarii kri slovansko. [...] Hudo je udarila sila azijaška Slovane« (Hubad, 1877, str. 196).

Skratka, klasična strateška poteza zahodnih avtorjev pri izključevanju in deformaciji je bila slikanje Drugega kot nekaj povsem tujega (Ruthner, 2018, str. 319–320). Dogodki, ki so se odvili v prvih dveh desetletjih 20. stoletja, so zunanjemu svetu prikazali sliko Balkana kot »soda smodnika« in ga stigmatizirali v izvorni prostor nasilja in primitivnosti (Sundhaussen, 1999, str. 626). Kot je bilo prikazano, so pri konstruiranju takšne slike s svojim specifičnim mejaškim orientalizmom in evrocentrizmom že veliko pred balkanskim vojnām sodelovali tudi slovenski avtorji.

26 Leta 1887 je Podlimbarski v *Ljubljanskem zvonu* tako zapisal: »Vsi, kar nas je slovanskega rodu, gledali smo na jug in pričakovali divnih stvari. Navduševali smo se za boreče brate in marsikako lepo besedo smo imeli za njih trpljenje in junaštvo. Bosno smo imenovali debelo solzo bolesti na lici matere Slave in Bošnjake zapadne Kozake« (Podlimbarski, 1887a, str. 76).

(JUGO)SLOVANSKA DOMAČNOST

Pomembno je izpostaviti, da je ta narativ morda sicer dominanten, ne pa tudi edini. Pri delu slovenskih piscev se je namreč zaradi posebnih okoliščin oblikoval pozitiven in vključujoč (jugo)slovanski imaginarij. Zaradi specifične populacijske sestave habsburške monarhije, katere del so bili tudi južni Slovani, se je v razmerju do tega domnevno tujega v nekaterih primerih pojavila ambivalentna napetost kulturnih razlik, kar je Edin Hajdarpašić strnil v koncept *br/other* (Hajdarpašić, 2015; za več o tem gl. tudi Ruthner, 2018, str. 231). Gre za to, da so nekateri slovenski avtorji sicer res sledili zahodnim trendom in v Bosni prepoznavali tistega *other* (»drugega«), drugi pa so tam zagledali svojega (jugo)slovanskega *brother* (»brata«). Josip Wester v svojih potovalnih nasvetih opozarja na bratsko varnost potovanja po Bosni: »med naše brate na jugu ti ni treba orožja. Tako varnega se človek malokje čuti ko med njimi« (Wester, 1910c, str. 725). Ne gre pa spregledati, da je bil del bosanskega prebivalstva tudi rimskokatoliške vere, kar je poleg »čašice rudečega vina« izdatno pripomoglo k zbliževanju slovenskih katoliških avtorjev z domačini (Kaš, 1883b, str. 148).²⁷ Nekateri pisci, ki so bili (jugo)slovansko usmerjeni, so tako poskušali prikazati povezanost in enotnost s prebivalci Bosne. Anton Aškerc v pesmi *Sopotnik* izraža slovansko zavest in govori celo o enem jeziku: »Tvoj jezik moj je jezik, čuj me, prijatelj ti! Slovanska sva si brata, ej ene sva krvi« (Aškerc, 1946, str. 184).²⁸ V tem že dokaj biološko obarvanem diskurzu jezik ne nastopa kot element distinkcije, hkrati pa kri deluje kot podlaga unitarizma. Neko podobno z biologijo pogojeno bratstvo Aškerc postavlja nad vero tudi v pesmi *V Husrev-Begovi Džamiji*, kjer med drugim govori tudi o tem, kako se v istem prostoru pri molitvi drug ob drugem bogu priklanjata berač in bogataš. V džamijo ga povabijo kot prijatelja, ker ga zanima, kako Slovani molijo k Alahu; pravi, da vsak po svoje, a da kot bratje vsi častijo boga (Aškerc, 1946, str. 186–187).

Nekateri avtorji so si v liku Jugoslovana – ki da ga »ne sme nikdar ločiti: ne jezik, ne pravopis, ne vera, ne vreme, ne prostor, ne gorje, ne sreča« (J. V-v., 1875) – predstavljali nekega novega in enotnega človeka, v katerem se spajajo tako elementi Zahoda kot tudi Vzhoda. Ideja (jugo)slovanstva, kot se kaže v analiziranih virih, je združevala predvsem dva pomembna elementa: eden je bil obrambne narave, drugi pa progresivne. Po eni strani so avtorji, ki so bili projugoslovansko naravnani, v svoji argumentaciji izpostavljali vsejugoslovansko obrambo pred domnevnimi sovražnimi neslovanskimi elementi v okolici; po drugi strani pa so si v liku (Jugo)slovana predstavljali človeka bodoče emancipacije, s katero bi s skupnimi močmi uresničevali ideje napredka v kulturi in blaginji nasploh (za več o tem gl. Ahasver, 1881, str. 395; Melik, 1974, str. 274–275).²⁹ Podlimbarski je tako pot do novega in predvsem poenotenega človeka bodočnosti in blaginje videl v povezovanju: »Sicer gre še vsak

27 O zanimanju in srečanju s pravoslavno vero gl. Wester, 1914b, str. 520.

28 O Aškercem svetu slovanske vzajemnosti gl. Baskar, 2008, str. 31.

29 Že Fanon je trdil, da je za dosego emancipacije treba ustvariti novo kožo, razviti novo mišljenje in postaviti na noge novega človeka (gl. Fanon, 2010, str. 267).

svojo pot, 'svaka majka svoje grli' in, 'svaka krava svoje tele liže', pravi blagor pa zasije Bošnjakom, kadar spoznajo, da so si vsi rodni bratje, ker, 'skladna braća nove dvore grade, a neskladna i stare prodaju'« (Podlimbarski, 1913, str. 171). Zadnje strani svojega romana nameni premišljevanju o, še vedno precej oddaljeni, (jugoslovanski) prihodnosti Bosne in Hercegovine, ko se bodo »soplemeniki na jugu zaupljivo ozirali na našo stran« (Podlimbarski, 1913, str. 502).

Številni avtorji so pogosto na podlagi stilsko-vizualnih elementov tematizirali podobnosti, sorodnosti Bosancev z južnoslovanskim prebivalstvom v habsburški monarhiji, pa tudi enotnost dela bosanskega prebivalstva med sabo. Podlimbarski tako zapiše, »da govore Turki in kristjani isto narečje, da so si po obrazih vsi podobni, kakor bi bili vsi bratje« (Podlimbarski, 1913, str. 53–54; prim. Kaš, 1883a, str. 93, 90; Krivec, 2024, str. 19–20). Omembe krajev povezanosti in druženju onstran verskih identitet, kjer »se shajajo vsako leto o kresu kristjani, katoliki in pravoslavni, iz vse Bosne, in tudi moslimani prihajajo v obilnem številu semkaj na božjo pot«, je mogoče najti v številnih virih (Wester, 1910a, str. 610; Kaš, 1894; Podlimbarski, 1887a, str. 77; Podlimbarski, 1913, str. 183). Nekakšna neformalna povezanost onstran verskih razlik naj bi temeljila tudi v domnevno izvorni enotnosti bogomilske krščanske tradicije: »Uspomena na prejšnje krščanstvo mohamedancev je tudi, da na isti dan hriščani slave sv. Ilijo, a Turki svojega, Alijo'. Predpoldnem je Ilija, a popoldne Alija« (Perušek, 1883b, str. 507).³⁰ Nekateri avtorji tako navajajo primere mirne koeksistence različnih veroizpovedi: »Tako na pr. običavajo Turki na božični dan krščane obiskavati pak jim čestitati« (Perušek, 1882a, str. 257).³¹

Josip Wester je skozi očala popotnika veliko prostora namenil opisovanju multi-kulturnega sobivanja različnih kultur v Bosni. Takšni prostori so bili že od nekdaj velemesta oz. še natančneje železniške postaje, kot je sarajevska, kjer ti »sili v oči dvojnost ali celo trojnost noše: civilna evropska, vojaške uniforme in domača narodna, in vsa ta pestrost se ti zgrinja in preminja pred očmi kakor prizor v kalejdoskopu« (Wester, 1910b, str. 653). Kot prostor srečevanj pa je prepoznal tudi mednarodni hotel Ilidža, kjer je ob večerni promenadi motril »slično prelivanje in strinjanje raznih kulturnih elementov. [...] Dame v najnovejših toaletah, šumečih in prosojnih: pariški in dunajski modeli ter ohlapne turške »dimije«; gospodje v svetlih oblekah s »panama« in »girardi«, domačini v domači noši, s fesi in turbani na glavi; seveda tudi častniki raznih barv in uniform« (Wester, 1910c, str. 716). Pri tem pa v Westerjevi predstavi prostor spajanja civilizacij ni bilo samo glavno mesto Bosne, ampak tudi mesta, kot je Banjaluka, kjer je opazal »prvikrat to nenavadno mešanje tipov in noš; zapad in vzhod v najboljšem medsebojnem sporazumu. [...] Na vrtu pred hotelom

30 O tem, da naj bi bila izbira muslimanske vere pragmatična odločitev, ki jo je mogoče spreminiti, gl. Perušek, 1882b, str. 311–312.

31 Nekakšno podobno relativno sproščeno in predvsem pragmatično sledenje verskim postavam v praksi izkazuje tudi praznovanje dneva svetega Jurija, za katerega neki bosanski musliman pravi, da »je tudi za nas praznik, ki ga obhajamo, kakor so to storili naši prednamci, ko so bili še kristjani« (Andrejka, 1904, str. 295).

je svirala vojaška godba, za mizami pa visoki častniki z dvema generaloma v sredi ter civilni domačini in tujci obeh spolov. Le tam izza plotja je prisluškoval in zapelečeval domači, orient'« (Wester, 1910a, str. 608–609). Vsekakor pa je simptomatično, da tudi Wester, ko z naklonjenostjo opisuje sobivanje in medsebojno plemenitenje Zahoda in Orienta, sledi ustaljenim predstavam superiornosti in hierarhij. Kot je moč razbrati iz zgornjega citata, »Orient«, kot je to z metaforo kazinskega otoka slikovito prikazal že Podlimbarski, očitno ni povabljen na zabavo kot enakopraven član, ampak mora ostati na drugi strani plotja. Kljub vsemu je razvidno, da so nekateri avtorji vsekakor izkazovali večjo senzibilnost za ravnanje in občevanje z domačini kot drugi (Podlimbarski, 1913, str. 35).³² Pri tem pa se pri nekaterih slovenskih piscih pojavlja posebnost, da zaradi podobne govorice in drugih elementov do določene mere pade kolonialna hierarhija, saj je »kolonialni gospod« pripravljen prisluhniti besedam »podrejenega« in mu tako izkazati priznanje enakopravnosti: »Kako prijazni in vljudni so ti preprosti ljudje, če govoriš z njimi v znanem jeziku; koliko bistrih opazk čuješ iz njih ust, kako dobro znajo presojeti upravne in politične razmere!« (Wester, 1910c, str. 719).

ZAKLJUČEK

V prispevku smo pokazali, da so lahko priseljenci, tudi Slovenci, v Bosni zasedali številne vloge, ki so bile v marsičem podobne tistim, ki so jih prebivalci zahodne Evrope igrali v izvenevropskih kolonijah (za več o tem gl. Osterhammel & Jansen, 2017). To se je kazalo v tipični instituciji kolonizacije kmetovalcev, zasedanju javnih delovnih mest (vključno s korupcijo) in izpolnjevanju oblastnih nalog znotraj šole, torej ključnega ideološkega aparata države. Kolonialno kulturno politiko pa so izvajali tudi na področju upodabljanja umetnosti. Obenem pa so bile te tipične kolonialne prakse lucidno identificirane in tudi kritizirane. Analiza je jasno pokazala slovensko prepoznavanje, razumevanje in tudi kritiko tipičnega kolonialnega elementa v Bosni, namreč polarne razdeljenosti kolonije. Posamezni avtorji so v izrazito protikolonialni maniri izražali tudi nasprotovanje in upor proti ideji o superiornosti zahodne kulture, jo prikazovali kot sprevrženo in dekadentno ter namesto tega prikazali opolnomočeno samopotrjevanje koloniziranih. Pri opisovanju bosanske stvarnosti so bili precej pogosti elementi evrocentrizma, torej posebne oblike etnocentrizma, ki pretirano poudarja Evropo kot civilizacijsko in kulturno središče sveta in druge kulture presoja z evropskimi merili. V soočanju z Drugim so tako lahko slovenski avtorji sebe dojemali kot del superiorne evropske civilizacije in poudarjali (ter vrednotili) kulturne razlike. Evropska zavest se je kazala v tako vsakdanjih elementih, kot so pripadnosti neki specifični izobrazbi, prehranskim navadam in pomenu (uporabi) jezika. Izkazalo

32 Domača govorica je veliko zanimanja pritegnila tudi pri drugih slovenskih udeležencih vojaškega pohoda (gl. Wester, 1914a, str. 479).

se je, da je Bosna služila tudi kot projekcija za slovenske notranje (nacionalno) politične boje z nemško govorečo javnostjo. Primerjanje bosanskih (jezikovnih) razmer s tistimi v Habsburški monarhiji jim je obenem omogočala izključitev madžarskega elementa. Strukturno mesto Drugega, v soočanju s katerim je pri slovenskih pisateljih prišlo do konstruiranja (jugo) slovanske solidarnosti in identifikacije, pa so poleg Nemcev in Madžarov lahko zasedli tudi »divji azijski Turki«.

Kar zadeva domnevne kontinuitete in homogenost pri diskurzu o Bosni, se je kot upravičena izkazala metodološka previdnost. Predstava o Bosni je bila vsebinsko zaznamovana glede na naravnosti posameznega avtorja. Nekateri pro(jugo) slovansko usmerjeni avtorji so tako izražali versko indiferentno naklonjenost in (bratsko) povezanost s prebivalci Bosne, ki je bila prikazana kot prostor multikulturnega in miroljubnega sobivanja različnih kultur in religij. Analiza je razkrila prostorske in simbolne oblike kolonialne segregacije, obenem pa opozorila na pomene jezika, kulture in vere kot ključnih točk identifikacije, izključevanja in povezovanja. To izpodbija stereotipno podobo Balkana kot »soda smodnika« in odpira prostor za alternativne imaginarije sožitja. Rezultati raziskave prinašajo prispevek k razumevanju slovenskega kolonialnega imaginarija, saj z uporabo postkolonialnih pristopov razkrivajo kompleksno prepletenost evrocentrizma, kulturne superiornosti in (jugo) slovanske domačnosti v slovenskih literarnih pogledih na Bosno.

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SUMMARY

ENCOUNTERS WITH COLONIAL BOSNIA: SLOVENIAN VIEWS BETWEEN EUROPEAN SUPERIORITY AND (SOUTH-)SLAVIC FAMILIARITY

Jaroš Krivec

Based on a cultural-historical analysis, the article examines the sources written by Slovenian officers, teachers, and writers who, in various ways, were connected with Bosnia during the time of the Austro-Hungarian monarchy.

In the first step, the article demonstrates that immigrants, including Slovenians, could play different roles in Bosnia, many of which were similar to those played by Western Europeans in non-European colonies. This was reflected in the typical institution of the colonization of peasants, the occupation of public jobs (including corruption), and the fulfillment of governmental tasks within the educational and cultural policy of Habsburg rule. These typical colonial practices were also lucidly identified and criticized by some authors.

In the second part, the analysis shows a clear Slovenian identification, understanding, and criticism of a typical colonial element in Bosnia, namely the polar division of the colonial world. The article focuses on the Slovenian anti-colonial critique of this phenomenon mainly through the description of the "*kazina*" as a segregated space where, strikingly similar to the English colonial institution of the club, a distinct colonial hierarchy of cultures was expressed.

The third part analyzes Eurocentric self-assertion through the expression of cultural differences and European/Western self-identification, of which the (South-) Slavic imaginary could have been a part. In confronting the Other, Slovenian authors thus perceived themselves as part of a superior European civilization and emphasized (and valued) cultural differences. European consciousness was manifested in such everyday elements as belonging to a specific education, food habits, and the meaning (use) of language. Through the expression of (South)Slavic sympathies, narratives of a common oppressed past, and the martial portrayal of the "savage Asian Turk," to whom the function of internal integration based on external demarcation was assigned, Slovenian writers constructed European (South-)Slavic solidarity and identification.

The analysis of the sources reveals that, in addition to exclusion and contempt, there was also an element of inclusiveness among some Slovenian authors, which was expressed through (South-)Slavic familiarity. Some pro-(South-)Slavic authors thus expressed, in a religiously indifferent way, affection and fraternal ties with (and among) the inhabitants of Bosnia, which was portrayed as a place of multicultural and peaceful coexistence or a fusion of different cultures and religions.

SLOVENIJA IN SLOVENSKI MOTIVI V *KOLEDARJU SPKD PROSVJETA* (1905–1947)

Biljana Babić¹

COBISS: 1.01

IZVLEČEK

Slovenija in slovenski motivi v Koledarju SPKD Prosvjeta (1905–1947)

Periodične publikacije v Bosni in Hercegovini pod avstro-ogrsko oblastjo in kasneje v obdobju prve skupne države jugoslovanskih narodov so bile priljubljeno sredstvo za izobraževanje vseh slojev prebivalstva. Ena od teh publikacij – *Koledar Srbskega prosvetno-kulturnega društva (SPKD) Prosvjeta* – je prinašala raznolike prispevke, od literarnih del do strokovnih člankov s področij zdravstva, kmetijstva, geografije, pedagogike itd., ki predstavljajo pričevanja o lastnem, pa tudi o drugih narodih. Avtorica je v raziskavi analizirala naslove in novice v zvezi s Slovenijo in slovenskimi motivi v izdajah *Koledarja* v vsem obdobju njegovega izhajanja med letoma 1905 in 1947.

KLJUČNE BESEDE: periodika, Slovenija, slovenski motivi, *Koledar SPKD Prosvjeta*

ABSTRACT

Slovenia and Slovenian Motifs in the Calendar SPKD Prosvjeta (1905–1947)

During Austro-Hungarian rule—and later in the first unified South Slavic state—periodical publications in Bosnia and Herzegovina served as a popular means for enlightening all strata of the population. One of those publications, the *Calendar of the Serbian Educational and Cultural Society (SPKD) Prosvjeta*, featured a variety of texts, ranging from literary contributions to expert articles on health, agriculture, geography, pedagogy, and other topics. These texts served as testimonies not only about the Serbian community but also about others. The study analyzes the headlines and news related to Slovenia and Slovenian motifs published in the *Calendar* between 1905 and 1947.

KEYWORDS: press, Slovenia, Slovenian motifs, *Calendar SPKD Prosvjeta*

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SPLOŠNE OPOMBE O KOLEDARJU SPKD PROSVJETA

Naše predhodno raziskovanje prisotnosti slovenskih motivov v prvi literarni reviji na območju Bosne in Hercegovine – *Bosanski vili* (1885–1914) – je pokazalo, da so bili v njej kontinuirano prisotni opisi oz. omembe Slovencev, prav tako so bile od samega začetka pa skoraj do konca izhajanja revije objavljane novice o slovenski kulturi in umetnosti (Babić, 2023). Glede na zgodovinski kontekst obdobje med letoma 1885 in 1914 predstavlja »čas intenzivnejšega naseljevanja slovenskega prebivalstva na območje Bosne in Hercegovine in živih stikov z domačim prebivalstvom, hkrati pa tudi obdobje tesnejšega zbliževanja južnih Slovanov. Kulturno-zgodovinske razmere so se v celoti odražale tudi v prvem literarnem časopisu na območju Bosne in Hercegovine pod avstro-ogrsko oblastjo« (Babić, 2023, str. 83). Logično kronološko nadaljevanje našega raziskovanja te tematike je bilo proučevanje Slovenije in slovenskih motivov v tisku na območju Bosne in Hercegovine v času prve skupne države jugoslovanskih narodov na korpusu vsebinsko sorodne periodične publikacije. »Literarni časopisi, namenjeni poučevanju in zabavi, so se v Bosni in Hercegovini pojavili že v prvem obdobju avstro-ogrske okupacije« (Kruševac, 1978, str. 303). Nekatere od teh revij so prenehale izhajati na začetku prve svetovne vojne, druge pa so obnovile in nadaljevale svoje delo. Zato smo izbrali *Koledar* Srbskega prosvetnokulturnega društva Prosvjeta (v nadaljevanju »SKPD Prosvjeta«). Revija je izhajala med letoma 1905 in 1947 in je predstavljala prvo glasilo društva Prosvjeta, ki je bilo ustanovljeno z namenom širjenja izobrazbe med ljudmi, med drugim tudi s pomočjo tiskanih publikacij.¹ Skupina 29 srbskih intelektualcev je 20. decembra 1901 naslovila na oblasti prošnjo za ustanovitev društva Prosvjeta z namenom materialne pomoči učencem in študentom ter za izobraževanje prebivalstva v Bosni in Hercegovini (Madžar, 2001, str. 64, 65–67; Božić, 2021, str. 32–33). Nato je »deželna vlada 5. julija 1902 odobrila pravila društva, 18./31. avgusta pa je v Sarajevu potekala ustanovna skupščina, na kateri je bil oblikovan Glavni odbor Prosvjete« (Božić, 2021, str. 33). Po zaključku študija so se v tujini izobraženi mladi Srbi vračali v domovino in se aktivno vključevali v javno življenje. Eden najpomembnejših korakov v tem smislu je bila ustanovitev društva Prosvjeta, ki je pomagalo pri šolanju revnih ter izobraževalo prebivalstvo. Ob primerjavi pogojev za začetek izdajanja *Bosanske vile* ter *Koledarja* dobi prej navedeno še večji pomen, če vemo, da v zadnjih desetletjih 19. stoletja, ko je bila ustanovljena *Bosanska vila*, še niso obstajala »društva ali ustanove, ki bi podpirale literarno revijo ali ji s svojo organizacijo koristile« (Kruševac, 1978, str. 303). Temeljno poslanstvo društva Prosvjeta je bilo zagotavljanje materialne

1 Vse dejavnosti društva so podrobneje opisane v *Koledarju* iz leta 1910, in sicer v članku z naslovom »Društvo Prosvjeta«, katerega avtor ni naveden.

podpore revnim učencem, vajencem in študentom med šolanjem (Madžar, 2001, str. 64), pa tudi izobraževanje Srbov in drugih narodov v Bosni in Hercegovini.²

Glavni odbor Prosvjete je na seji 20. decembra 1903 sklenil, da začne izdajati *Koledar* (Božić, 2021, str. 33). Prva številka, ki je imela 86 strani, je bila natisnjena leta 1905. *Koledar* je bil tiskan v cirilici v srbskem jeziku in je pogosto menjal uredništva ter urednike. Prvi urednik je bil Svetozar Ćorović, zadnji pa Nikola Mačkić, medtem ko je zadnji dve številki *Koledarja* za leti 1946 in 1947 uredil uredniški odbor.

Kot smo že omenili, je bil *Koledar* s svojo vsebino namenjen širši bralski publiki in je izhajal v obdobju od leta 1905 do leta 1947, z občasnimi prekinitvami. Tako je bil na primer *Koledar* za leto 1914 prepovedan, celotna naklada pa zaplenjena (Madžar, 1991, str. 63). Vendar pa je do triletna prekinitve izhajanja prišlo že pred vojnimi dogodki, in sicer po izidu druge številke leta 1906. Med letoma 1910 in 1914 so se kot uredniki izmenjali Đorđe Ćokorilo, Vladimir Ćorović in Risto Radulović. V teh številkah *Koledarja* so bili objavljeni prispevki pisateljev, znanstvenikov in drugih pomembnih osebnosti kulturnega in znanstvenega življenja tistega časa.

Po prvi svetovni vojni je Prosvjeta nadaljevala svoje delo in od leta 1922 dalje izdajala *Koledar* pet let. En letnik so natisnili skupaj z Matico srbsko iz Novega Sada. Uredil ga je Vasa Stajić, profesor in publicist, namenjen pa je bil mestnim prebivalcem. Druga številka je bila namenjena širši publiki, vključno z manj pismenimi sloji prebivalstva (kmeti), uredil pa jo je Nikola Vidaković, šolski upravitelj (za več gl. SPKD Prosvjeta Austrija, 2025).

Koledar za leto 1923 je uredil Nikola Vidaković, medtem ko je bil v letih 1924 in 1925 urednik Vojislav Gaćinović, uslužbenec Prosvjete. Ob dveh pomembnih jubilejih, povezanih z delovanjem društva, je Vasilj Grdić objavil dva članka, iz katerih je razvidno, kako je društvo v tem času napredovalo. V prvem članku, objavljenem leta 1925 ob dvajsetletnici izhajanja *Koledarja*, Grdić piše: »Koledar Prosvjeta je bil po mnenju strokovne kritike ocenjen kot najboljši pri nas« (V. G., 1925). V drugem članku, objavljenem leta 1932 ob tridesetletnici ustanovitve Prosvjete, pa zapiše: »Prosvjeta kulturno deluje na celotnem ozemlju države, saj je takoj po osvoboditvi presegla vse verske, plemenske in pokrajinske meje« (Grdić, 1932).

V tem obdobju je opazen nov pristop tako v vsebini kot tudi v obsegu *Koledarja*. Zaznati je množico raznolikih prispevkov, skrbno tehnično urejanje in ilustriranje ter premišljeno izbiro sodelavcev. Med njimi so bili ugledni pisatelji, znanstveniki in kulturni delavci, kot so Ivo Andrić, Desanka Maksimović, Isak Samokovlija, Hamza Humo, Frano Alfirević, Hamid Dizdar, Isidora Sekulić in številni drugi.

Po drugi svetovni vojni sta izšli le še dve izdaji *Koledarja*: leta 1946, ko je nadaljeval s prejšnjo tradicijo, in leta 1947, ko je vseboval največ prispevkov s tematiko narodnoosvobodilnega boja, skladno s tendencami novega časa.

2 Poleg srbskih dijakov in študentov je v »obdobju od leta 1902 do leta 1914 Ministrstvo za prosveto štipendiralo 59 muslimanskih dijakov ter 34 dijakov in študentov hrvaške narodnosti« (SPKD »Prosvjeta«, 2008).

Jasno je, da je *Koledar*, kljub prekinitvam v izhajanju, predstavljal enega najpomembnejših tiskanih glasnikov v medvojnem obdobju, usmerjenega v izobraževanje in kulturni razvoj vseh slojev prebivalstva.

SLOVENIJA IN SLOVENSKI MOTIVI V *KOLEDARJU* SPKD PROSVJETA

V osrednjem delu raziskave smo se osredotočili na Slovenijo in slovenske motive, ki so prisotni v izdajah *Koledarja*.³ Analizirali smo besedila avtorjev, ki so neposredno ali posredno pisali o Sloveniji oziroma slovenskih motivih,⁴ nato pa smo izbrane članke tematsko razdelili in dodali komentarje. Zaradi zapletenih družbeno-političnih dogodkov, vojnih razmer in drugih razlogov je časopis izhajal s prekinitvami, skupno pa je bilo objavljenih nekaj več kot 1.200 člankov in prispevkov. Očitno je, da je bilo v obdobju avstro-ogrske uprave v Bosni in Hercegovini, torej v prvih sedmih številkah (1905–1914), v *Koledarju* prisotnih zelo malo slovenskih motivov. Kljub temu je že v prvi številki, ki je izšla leta 1905, v članku z naslovom »Veliki dobrotniki Prosvjete“ omenjena Spodnja Štajerska v povezavi s poreklom Ljubomira Krsmanovića (gl. Sliko 1), zelo pomembnega dobrotnika Prosvjete: »Družina Krsmanović izvira iz starega rodu – poznana je bila že v šestnajstem stoletju. Nekateri njeni člani so celo katoliki, ki so se leta 1600 preselili iz Hercegovine v Telčak, v Spodnjo Štajersko« (M. K., 1905, str. 100).

Nadalje je omenjena tudi Ljubljana v povezavi s Krsmanovićevim šolanjem: »Leta 1873 je Ljubo odšel iz gimnazije na nadaljnje šolanje v Ljubljano, kjer je v dveh letih in pol zaključil trgovsko šolo« (M. K., 1905, str. 100).

Po prvi svetovni vojni je bil v *Koledarju* za leto 1922 objavljen članek anonimnega avtorja z naslovom »Slovenija in osvoboditev«. To je prvi članek v *Koledarju*, ki je v celoti posvečen Sloveniji. V isti številki je bilo objavljenih še šest besedil, v katerih je prisoten slovenski motiv.

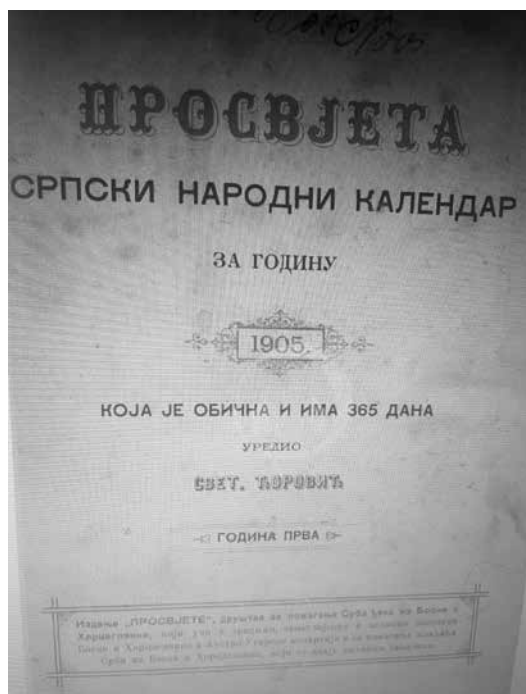
Ustanovitev prve skupne države južnih Slovanov se je močno odražala v vsebini revije in programski usmeritvi. V primerjavi s predvojnim obdobjem do leta 1914 je v časopisu opaziti bistveno večje število besedil, posvečenih drugim narodom, predvsem jugoslovanskim. Ti so bili obravnavani z ekonomskega, zdravstvenega, kmetijskega, geografskega, kulturnega in drugih vidikov.

3 »Popis prebivalstva iz leta 1910 govori o tem, da je v Bosni in Hercegovini živelo 3.108 Slovencev. Število je po tem letu še raslo« (Gombač, 2008, str. 194).

4 Društva Slovencev so prispevala tudi k temu, »da so prebivalci Bosne in Hercegovine bolje spoznali Slovence in njihovo kulturo« (Grum, 1983, str. 86).



Slika 1: Ljubomir R. Krsmanović (vir: Bosanska vila, št. 3, leto XXI (1906), str. 33).



Slika 2: Naslovna stran prve številke *Koledarja* (1905).

Pri analizi vseh razpoložljivih številok *Koledarja*⁵ smo identificirali skupno trideset člankov, v katerih so prisotni slovenski motivi. Med njimi je zgolj deset člankov, katerih naslovi in vsebina se neposredno nanašajo na Slovenijo in slovenske motive, ostali pa te motive omenjajo v manjši ali večji meri, večinoma zgolj obrobno. Iz analiziranih tridesetih člankov smo izluščili naslednje tematske sklope s slovenskimi motivi:

- a) zgodovinska dejstva in geografski predeli Slovenije,
- b) članki, povezani s slovenskimi književniki in drugimi znanimi osebnostmi,
- c) izobraževanje in
- d) članki o jugoslovanstvu.

V uvodnem delu smo poudarili, da je revija *Koledar* tiskala besedila v cirilici in srbskem jeziku, vendar pa je vsebovala tudi citate v drugih jezikih, vključno z nekaj citati v slovenščini. Prav tako so med številnimi sodelavci poleg že znanih literarnih del slovenskih književnikov prisotni prispevki slovenskih avtorjev. Na koncu raziskave objavljamo celotno bibliografijo člankov s slovenskimi motivi, ki so bili objavljeni v *Koledarju* med njegovim izhajanjem.

GEOGRAFSKI PREDELI IN ZGODOVINA SLOVENIJE

Naravne lepote Slovenije so že pred sto leti navdihovale in pritegovale pozornost avtorjev. Tako ni presenetljivo, da je Josip Pasarić v obsežnejšem članku z naslovom »Naše planinstvo« poudaril lepote Triglava, Bohinjskega in Blejskega jezera ter drugih slovenskih in južnoslovanskih pokrajin. Ob tem se je dotaknil tudi ustanavljanja planinskih društev pri južnih Slovanih in posebej pohvalno opisal planinstvo pri Slovencih: »Slovenci so l. 1893. ustanovili v Ljubljani Slovensko planinsko društvo (SPD), ki je že drugo leto začelo izdajati svoje glasilo *Planinski Vestnik*« (Pasarić, 1922). Raziskovanje krasa je Radivoja Simonovića vodilo celo do Triglava, kar je omenil v članku »Kako sem prišel v stik z geografijo?« (Simonović, 1933). V isti številki *Koledarja* je J. Švegel navdihnjeno opisovala lepote Bleda (Švegel, 1933); avtor, podpisan z inicialkama M. M., pa je predstavil gospodarske in kulturne značilnosti Ljubljane (M. M., 1933).

Med zgodovinsko obarvanimi članki posebej izstopajo trije. V prvem z naslovom »Ustoličevanje slovenskih vojvod« avtor Ivan Trnski podrobno opisuje starodavni slovenski običaj izbire vojvode na Gosposvetskem polju pri Celovcu (Trnski, 1933). V drugem članku, »Bosanska in hercegovaška naselja na Hrvaškem«, avtor M. Grujić obravnava naseljevanje srbskih krajišnikov iz Bosne leta 1535, ko jih je avstrijska vojska naselila na območju Kranjske, Štajerske in Hrvaške kot obliko obrambe pred

5 Gradivo smo črpali iz *Koledarja*, ki je na voljo v digitalizirani bazi na spletni strani www.infobiro.ba. Številke strani največkrat niso navedene ali pa so nečitljive, zato smo v članku navedli le leto izida revije. Izjema je prva številka *Koledarja*, ki nam je bila na voljo v tiskani obliki (gl. Slika 2).

turškimi vpadi (Grujić, 1941). V tretjem članku, obsežnem delu z naslovom »Slovenija in osvoboditev«, katerega avtor ni naveden, je pojasnjena politična in gospodarska podrejenost Slovenije močnejšim sosedam v preteklosti, kar je povzročilo tudi kulturno nazadovanje slovenskega naroda (Slovenija i oslobođenje, 1933).

Članki v tej skupini ponujajo celovit in pregleden vpogled v Slovenijo. Poudarjajo njene naravne lepote ter zgodovinske okoliščine, ki so jo oblikovale od časov kneza Sama do vključitve v novo nastalo Kraljevino SHS, pozneje Kraljevino Jugoslavijo in nazadnje FLR Jugoslavijo.

BESEDILA O SLOVENSKIH PISATELJIH IN ZNANIH OSEBNOSTIH

Med znanimi osebnostmi, omenjenimi v *Koledarju*, je največ prostora namenjenega Ivanu Cankarju in Emilijanu Lileku, kar je razumljivo, saj sta bila oba del svojega življenja vezana na Sarajevo.⁶ Cankarjeva črtica *Skodelica kave* je bila v celoti objavljena v *Koledarju* za leto 1933 (Cankar, 1933), medtem ko je Ljubica S. Janković že prej, v *Koledarju* za leto 1925, opravila vsebinsko analizo in pregled vseh Cankarjevih del (Janković, 1925). Savo Ljubibratić in Vojislav Besarović sta izjemno pohvalno pisala o Emilijanu Lileku, ki je več kot dvajset let deloval kot profesor na sarajevski gimnaziji. Ljubibratić navaja: »Izbiral je snov in predavanja tako spretno pripravljaj, da je pri svojih učencih prebujal, razvijal in utrjeval narodno zavest, ljubezen do naroda, narodni ponos in človekovo dostojanstvo ter ljubezen do resnice in občutek enakosti in enakopravnosti« (Ljubibratić, 1932). Besarović pa poudarja izjemne pedagoške sposobnosti Lileka in pomembno dejstvo, da je bil slednji eden izmed donatorjev društva Prosvjeta: »Dve desetletji je poučeval zgodovino in geografijo naše najstarejše generacije ter kot odličen pedagog v njih prebujal smisel za vse, kar je lepo, dobro in plemenito« (Besarović, 1941).

Poleg omenjenih dveh znanih Slovencev lahko dodamo še Frana Maslja - Podlimbarskega, ki je živel v Tuzli v času avstro-ogrske uprave.⁷ Fran Ilešić (1925) v članku z naslovom »Gospodin Franjo (1914)«, objavljenem v *Koledarju* za leto 1925, podrobno pojasnjuje, kako je Ilešić uspel avtobiografski roman Frana Maslja rešiti pred gotovim uničenjem s strani avstrijske policije, saj je imel roman protiavtstrijski značaj in je opisoval korupcijo ter brezobzirnost avstrijskih uradnikov v Tuzli. Svoje mesto v *Koledarju* za leto 1933 je kot edina slovenska pesem našla tudi oda *Soči* Simona Gregorčiča (Gregorčič, 1933), kar pomeni, da je bila v publikacijo vključena tudi slovenska poezija.

6 Ivan Cankar je septembra 1909 prišel v Sarajevo k svojemu bratu Karlu (Čuk, 2016, str. 52) in tam ostal dva meseca. Emilijan Lilek je kot profesor v Sarajevu delal od leta 1883 do leta 1902 (Riman & Riman, 2016, str. 350; Kržišnik - Bukić, 2000, str. 306).

7 »Fran Maselj Podlimbarski je kot poklicni častnik avstro-ogrske vojske v letih 1885–1888 služboval v Tuzli. Leta 1913 je v Ljubljani izšel njegov roman *Gospodin Franjo*, ki ima več kot 500 strani in obravnava bosansko socialno in politično tematiko« (Kržišnik - Bukić, 2007, str. 62).

Bogdan Stanojević je v članku, posvečenem Kraljevi univerzitetni knjižnici v Zagrebu, omenil Janeza Vajkarda Valvasorja in poudaril njegove zasluge: »Osnovo grafične zbirke sestavlja bogata zbirka grafičnih listov, ki jih je v 17. stoletju zbral slovenski plemič J. V. Valvasor. V tej zbirki so še posebej dobro zastopani stari italijanski, francoski in nemški mojstri« (Stanojević, 1922). Kosta Strajnić je v članku »Umetnost Jugoslovanov« opisal slovenske slikarje, kot so Rihard Jakopič, Ivan Grohar, Matija Jama in drugi, ter slavnega arhitekta Jožeta Plečnika, skupaj z uveljavljenimi srbskimi in hrvaškimi umetniki, z njihovimi osnovnimi značilnostmi in najpomembnejšimi umetniškimi dosežki (Strajnić, 1941).

Ob pomembni obletnici, 150-letnici smrti Vuka Karadžića, sta bila v *Koledarju* za leto 1938 objavljena dva članka. Prvi je v celoti objavljeno predavanje profesorja Božidarja M. Tomića (1938) z naslovom »Vuk Stefanović Karadžić, njegov duhovni lik in pojav, njegov pomen in veličina«, ki je bilo 8. novembra 1938 izvedeno v Banjaluki. Drugi članek avtorja D. Arandelovića nosi naslov »Vukov jezik in današnji jezik« (Arandelović, 1938). Oba avtorja omenjata Vukov prihod na Dunaj in njegovo poznanstvo s Slovencem Jernejem Kopitarjem ter stike med srbskim in slovenskim jezikom v njunem času. Nadalje Risto Jeremić v svojem delu »Splošni pregled zdravstvenih in medicinskih razmer v Bosni in Hercegovini v preteklosti« navaja podatke Benedikta Kuripešića iz 16. stoletja: »Slovenec Kuripešić je leta 1530 na poti skozi Bosno v Carigrad opazil, da je bila Bosna takrat redko poseljena, ker jo je pogosto prizadela kuga« (Jeremić, 1941).

Osrednja figura besedil, katerih tematika se nanaša na znane slovenske kulture, je zgodovinar in etnolog Emilijan Lilek, ki je v Sarajevu živel med letoma 1883 in 1902, kar je gotovo posledica njegovega dolgoletnega dela na sarajevski gimnaziji, njegovih izjemnih osebnostnih lastnosti in dejstva, da je bil eden od donatorjev Prosvjete.⁸ Takoj za njim sta po zastopanosti v *Koledarju* pisatelja Ivan Cankar⁹ in Fran Maselj Podlimbarski. Oba sta del svojega življenja preživela v Bosni in Hercegovini, eden v Sarajevu, drugi v Tuzli, zaradi česar je njuno delo postalo znano sodelavcem in uredništvu *Koledarja* ter našlo mesto na straneh te publikacije.

Pouk

O dobro organiziranem in za tisti čas inovativnem izobraževanju v šolah na območju Slovenije pišejo avtorji treh člankov v *Koledarju*. Tako V. Borjanović v prispevku z naslovom »O poklicnem izobraževanju v naši državi« navaja srednje tehniške šole v Ljubljani, Splitu, Zagrebu in Sarajevu ter dodaja: »Srednja tehniška šola v Ljubljani je najbolj dovršen tip te vrste šol v naši kraljevini. Deli se na gradbeni oddelek in

8 »O tem, kako mu je priraslo k srcu zlasti, šeher' Sarajevo, priča dejstvo, da se je še na stara leta spomnil sarajevske Prosvjete in je postal njen legator« (Špindler, 2010, str. 12).

9 »Ivan Cankar je pred prvo svetovno v Sarajevu za nekaj mesecev obiskal brata Karla, ki je bil eden od mnogih slovenskih jezuitskih duhovnikov v Bosni in Hercegovini« (Kržišnik - Bukić, 2007, str. 552–553).

mehanično-tehnični oddelek. Pouk traja štiri leta, sprejemajo pa učence po zaključeni četrti gimnaziji. Ta šola je po rangi enaka višjim gimnazijam z maturo» (Borjanović, 1922). Nekatere od teh šol so prinašale precejšnje prihodke, kar je Borjanović avtor prav tako izpostavil: »Tako je npr. Centralni zavod za žensko domačo obrt v Ljubljani v glavnem čipkarsko središče za Slovenijo. V Sloveniji je pred vojno proizvodnja čipk kot domače obrti znašala več kot 2.000.000 kron na leto» (Borjanović, 1922).

A. G. Jovanović (1922) je v članku z naslovom »Kmetijsko izobraževanje pri nas« zapisal: »Zelo koristne so šole za kmečke gospodinje [...]. Te šole so na splošno novejšega datuma, v naši državi pa jih je zelo malo. Največ jih je v Sloveniji: v Šmihelu pri Novem mestu (ustanovljena leta 1910), v Mariboru (ustanovljena leta 1919), v Marijanšutu pri Vrbanji (ustanovljena leta 1898).«

Samo z začetnico S. (1938) je podpisano besedilo z naslovom »Prosveta in delo na osveščanju«, ki med vsemi banovinami Kraljevine Jugoslavije izpostavlja Dravsko banovino kot dober primer, kjer je izobraževanje naprednejše kot v drugih banovinah Kraljevine.

Čeprav gradivo o izobraževanju, ki se nanaša na območje Slovenije, ni preveč obsežno, v njem izstopa očitna tendenca izpostavljanja prednosti takšnega izobraževanja in opozarjanja na potrebo, da se pri organizaciji šol in izobraževalnega procesa po Dravski banovini zgledujejo tudi vse druge banovine.

Besedila o jugoslovanstvu

Vrsta družbeno-političnih sprememb na Balkanu na začetku 20. stoletja, med katerimi lahko izpostavimo prihod dinastije Karađorđević na oblast v Srbiji ter aneksijo Bosne in Hercegovine leta 1908, kar časovno sovпада s prihodom »mladih intelektualcev, izobraženih v tujini« (Ostojić, 2022, str. 304), se je odražala tudi v kulturni politiki revij v prvih desetletjih 20. stoletja. Na to spremembo so neizogibno vplivale »povezave mladine prek tajnih, pa tudi javnih organizacij in vse večja odprtost tiska za jugoslovansko idejo« (Ostojić, 2022, str. 304). Zgornja ugotovitev velja tudi za *Koledar*, kar je najbolj razvidno iz naslovov in vsebine člankov, objavljenih med obema vojnoma.¹⁰

Marko Car (1922), ki piše o uspehih jugoslovanskega Oddelka za umetnost na Ministrstvu za prosveto, navaja podatke, ki se nanašajo tudi na gledališča v Ljubljani in Mariboru. D. Đorđević in P. Sokolović v članku »Nastanek Kraljevine Jugoslavije« izpostavita naslednje: »Začetek državnega življenja pri Jugoslovanih se kaže že v sedmem stoletju, in to pri Slovencih. Veliko Samovo kraljestvo je na jugu obsegalo tudi Koroško, naseljeno s Slovenci. Poleg tega se je v novejšem času na vseh straneh začela krepiti skupna narodna zavest ter širiti misli o narodni in politični enotnosti ter neodvisnosti Jugoslovancev« (Đorđević & Sokolović, 1933).

¹⁰ Sicer pa je ta tema manj prisotna v prvih sedmih številkah *Koledarja*, natisnjenih pred začetkom prve svetovne vojne.

Nadalje je M. Moskovljević (1933) objavil članek »Jugoslovani v drugih državah«, v katerem so navedeni okvirni statistični podatki o številu jugoslovanskih prebivalcev izven Jugoslavije. Za Slovence navaja naslednje: »V Avstriji je ostalo okoli 80 tisoč Slovencev na Koroškem. V Nemčiji dela v rudnikih okoli 20 tisoč Slovencev. Po ocenah je v Združenih državah Amerike več kot 600 tisoč Jugoslovancev, od tega največ Slovencev« (Moskovljević, 1933). J. Matl (1925) v svojem besedilu »O jugoslovanskem kulturnem razvoju (Sociološke opombe)« omenja slovenska pisatelja J. Kersnika in I. Cankarja ter druge jugoslovanske pisatelje. Josip Šilović (1936) v besedilu »Jugoslovanska mati« piše o herojstvu in žrtvovanju jugoslovanskih mater ter podaja opis matere izpod peresa več pisateljev, tudi Ivana Cankarja. Prav citati iz Cankarjevega dela so bili objavljeni v slovenščini.

Edina Slovenka, omenjena v *Koledarju*, je znana slikarka Ivana Kobilca,¹¹ in sicer v članku Jovana Kršića (1936) z naslovom »Slikarstvo v Sarajevu«: »Freske v sarajevski Seminarski cerkvi sta naslikala Oton Iveković in Ivana Kobilca, odlična slovenska slikarka.« V zadnji številki *Koledarja* dva avtorja povzdiguje (jugo)slovansko enotnost. Tako Vojislav Bogičević (1947) v članku »Proga Banovići–Brčko, nesmrtno delo mladine Jugoslavije« piše: »Z mladino svobodne Jugoslavije se je pri skupnem delu znašla tudi junaška mladina Julijske krajine. S tem se je ponovno pokazala neustavljiva želja po skupnem življenju, po svobodi junaškega naroda Julijske krajine, po priključitvi k matični Jugoslaviji.« Drugi je članek Ljube Babića (1947) z naslovom »Slovensko bratstvo« z jasnim sporočilom o (jugo)slovanski vzajemnosti.

Jasno je, da je bila v medvojnem obdobju ideja jugoslovanstva v *Koledarju* programsko vključena v politiko revije, bodisi s strani angažiranih sodelavcev bodisi s strani urednikov, ki jih je bilo, kot smo že omenili, več. Očitna je programska sprememba v primerjavi s prvimi sedmimi številkami, tiskanimi v avstro-ogrskem obdobju, torej v obdobju med letoma 1905 in 1914, čeprav so tendence po zbliževanju južnih Slovanov nekoliko prežemale tudi vsebine teh člankov.

ZAKLJUČEK

Iz vsega navedenega je jasno, da je imel *Koledar* SPKD Prosvjeta kljub prekinitvam v izhajanju zelo pomembno kulturno-zgodovinsko vlogo pri ohranjanju in promoviranju prosvete ter kulture med prebivalstvom Bosne in Hercegovine. Kot smo videli, so na podlagi raziskane vsebine *Koledarja* v kontekstu omembe Slovenije in slovenskih motivov so tematski okviri obsegali zgodovinska dejstva in geografske pokrajine Slovenije, besedila o slovenskih pisateljih in drugih znanih osebnostih

11 »Ivana Kobilca: v Sarajevu od leta 1895 do leta 1903, mdr. je leta 1899 naslikala tedanjega sarajevskega župana Mehmed-bega Kapetanovića Ljubušaka; ustanovila je klub likovnih umetnosti, v katerem so se zbirali slikarji in prosvetni delavci, med njimi tudi Emilijan Lilek, profesor zgodovine na gimnaziji, pisec srednješolskih učbenikov in strokovnih člankov za zgodovino« (Kržišnik - Bukić, 2007, str. 74, 572).

ter besedila o izobraževanju in jugoslovanstvu. Na eni strani se pojavljajo besedila, ki se neposredno nanašajo na slovenske motive in so zelo obsežna, na drugi strani pa besedila, kjer so ti motivi omenjeni zgolj mimogrede, raziskovane vsebine pa so kratke. Prav tako lahko zaključimo, da je bila prisotnost Slovenije in slovenskih motivov v *Koledarju* bolj intenzivna v jugoslovanskem obdobju, medtem ko je bila v obdobju avstro-ogrske oblasti precej skromna. To je neposredno povezano s spremenjeno politično situacijo po prvi svetovni vojni in programsko usmeritvijo revije. Najpomembnejše slovenske osebnosti, ki so bile v *Koledarju* predstavljene z izjemno naklonjenostjo, so dolgoletni profesor sarajevske gimnazije in donator Prosvjete Emilijan Lilek ter pisatelja Ivan Cankar in Fran Maselj - Podlimbarski, kar je povsem skladno z novo usmeritvijo revije. Vendar pa niso bili prezrti niti drugi kulturni delavci, umetniki in inženirji (na primer Jože Plečnik, Ivana Kobilca, Rihard Jakopič, Matija Jama in drugi). Glede na zgodovinski kontekst je bilo obdobje med letoma 1922 in 1947 dejansko obdobje prve in druge skupne države Jugoslovanov ter intenzivnih medsebojnih stikov domačega prebivalstva, kar se je v celoti odražalo tudi v prvem glasilu SPKD Prosvjeta.

ZAHVALE IN DRUGI PODATKI

Delo je nastalo v okviru bilateralnega projekta med Bosno in Hercegovino ter Republiko Slovenijo za leti 2021 in 2022 z naslovom »Potomci slovenskih izseljencev in ohranjanje slovenskega jezika v Bosni in Hercegovini« in je bilo predstavljeno na konferenci Slovenske migracije in povezovanje izseljenih Slovenk, Slovencev v Bosni in Hercegovini, ki je potekala 10. maja 2023 v ZRC SAZU Ljubljana.

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SUMMARY

SLOVENIA AND SLOVENIAN MOTIFS IN THE *CALENDAR SPKD PROSVJETA* (1905–1947)

Biljana Babić

During Austro-Hungarian rule—and later in the first unified South Slavic state—periodical publications in Bosnia and Herzegovina served as a popular means for enlightening all strata of the population. One of those publications, the *Calendar of the Serbian Educational and Cultural Society (SPKD) Prosvjeta*, launched with the intention of the cultural and educational progress of both the Serbian people and other peoples in Bosnia and Herzegovina, featured a variety of texts, ranging from literary contributions to expert articles on health, agriculture, geography, pedagogy, and other topics. These texts served as testimonies not only about the Serbian community but also about others. The study analyzes the headlines and news related to Slovenia and Slovenian motifs published in the *Calendar* between 1905 and 1947. Slovenian motifs include descriptions of Slovenia in a historical, geographical, economic, and cultural context. Next, prominent Slovenian cultural figures—including writers (Ivan Cankar and Fran Maselj-Podlimbarski), historians and ethnologists (Emilijan Lilek), painters (Rihard Jakopič, Ivan Grohar, and Matija Jama), and architects (Maks Fabiani and Josip Plečnik)—as well as other notable personalities, appear. However, it is evident that the *Calendar* gave the most space to two Slovenians who moved to Bosnia and Herzegovina, more precisely, to Sarajevo, and spent part of their lives there, namely, Emilijan Lilek and Ivan Cankar. In some issues of the *Calendar*, Slovenians (F. Ilešič, J. Švegel) were signed as the authors of the articles. Almost all the mentioned Slovenian motifs in the *Calendar* are wrapped in the garb of the idea of Yugoslav unity.

DEMOGRAFSKE ZNAČILNOSTI TUZELSKIH SLOVENCEV IN NJIHOVA ORGANIZIRANOST

Dušan Tomažič,¹ Alija Suljić^{II}

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IZVLEČEK

Demografske značilnosti tuzelskih Slovencev in njihova organiziranost

Avtorja v prispevku obravnavata zgodovino naseljevanja Slovencev na območju Tuzelskega kantona, kamor so prvi priseljenci prišli že v času Avstro-Ogrske. Analizirata popise prebivalstva med letoma 1910 in 2013, s poudarkom na vplivu vojne v BiH na demografske spremembe. Leta 1993 je bilo zaradi humanitarnih potreb ustanovljeno Društvo Slovenska skupnost, v katerega se je vključilo 660 družin oziroma skoraj 1.700 prebivalcev. Zaradi izseljevanja pa se je leta 2013 za Slovence izreklo le še 51 oseb.

KLJUČNE BESEDE: Slovenci, Tuzelski kanton, izseljevanje, Društvo Slovencev, demografske spremembe

ABSTRACT

Demographic Characteristics of Tuzla Slovenians and Their Organization

The article explores the history of the Slovenian settlement in the Tuzla Canton area of Bosnia and Herzegovina, dating back to the Austro-Hungarian period. It analyzes census data from 1910 to 2013, highlighting the impact of the Bosnian War on demographic changes. In 1993, due to humanitarian needs, the Slovene Community Association was established, bringing together 660 families and comprising nearly 1,700 members. Due to post-war emigration, only 51 individuals declared themselves as Slovenians in the 2013 census.

KEYWORDS: Slovenians, Tuzla Canton, emigration, Slovene Association, demographic changes

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UVOD

Prva doslej znana imena Slovencev na območju današnje Bosne in Hercegovine so v zgodovinskih virih omenjana že v 16. stoletju (Kržišnik - Bukić, 2007, str. 20). Pri Slovencih v Bosni in Hercegovini je vidna ozemeljska navezava na panonski prostor (širše območje Banja Luke), poleg tega pa je opazna njihova prisotnost v rudarsko-železarskih središčih (Kakanj, Vareš, Ljubija, Tuzla) ter v glavnem mestu (Josipovič, 2018, str. 128).

Do prvega večjega vala priseljevanja so prihajali rudarji in obrtniki. Po tem, ko je avstro-ogrska monarhija anektirala Bosno in Hercegovino, so Slovenci prihajali kot javni uslužbenci, umetniki, učitelji in strokovnjaki v gospodarstvu. Drugi val priseljevanja se je začel po prvi svetovni vojni, v času kraljevine Srbov, Hrvatov in Slovencev. Do zadnjega vala selitev v Bosno in Hercegovino je prišlo po drugi svetovni vojni, ko so strokovnjaki iz Slovenije prihajali v Bosno in Hercegovino, da bi sodelovali pri izgradnji različnih infrastrukturnih objektov (Tomažič, 2018, str. 145). Večina Slovencev je živela v večjih mestih v Bosni in Hercegovini: v Sarajevu, Tuzli, Banjaluki, Zenici in Mostarju (Tomažič, 2018, str. 146). Kljub temu, da je šlo za številčno manjšo skupnost, je ta uspela ohraniti določeno raven identitetne trdnosti, ki se danes kaže predvsem v organiziranem delovanju društev.

Sodobni demografski kazalniki kažejo, da je slovenska skupnost v BiH, vključno s tuzelsko regijo, izpostavljena splošnim trendom manjšinskega življenja na Balkanu: upadanju števila pripadnikov, staranju populacije in zmanjševanju aktivne uporabe jezika. Kljub temu društvo Slovenska skupnost Tuzla še naprej aktivno prispeva k ohranjanju kulturne in jezikovne dediščine ter h krepitvi povezav z matično domovino. Organiziranost te skupnosti ni zgolj vprašanje formalne strukture, temveč obenem odraža simbolno pomembno obliko ohranjanja identitete v večetničnem okolju (Letno poročilo, 2022). Cilj prispevka je osvetliti ključne demografske značilnosti Slovencev v Tuzelskem kantonu – številčnost, starostno, spolno, versko in jezikovno strukturo – hkrati pa teritorialno poselitev znotraj kantona. Avtorja raziskujeta pomen kulturne organiziranosti in institucionalne dejavnosti za dolgoročno vzdržnost etnične skupnosti, kar v širšem kontekstu prispeva k razumevanju izzivov in potencialov manjšinskih skupnosti v postsocialističnem in postjugoslovanskem prostoru. Prispevek med drugim temelji na analizi letnih poročil Slovenske skupnosti Tuzla in na intervjujih, opravljenih z njihovimi člani leta 2023.

POGLED V PRETEKLOST SLOVENCEV TUZELKEGA KANTONA

Slovensko prebivalstvo je na območju današnjega Tuzelskega kantona prisotno že od konca 19. stoletja. Med znanimi Slovenci v Tuzli je bil Fran Maselj - Podlimbarski, slovenski častnik in pisatelj, ki je v tem mestu živel v letih 1885–1889. Masljevo najobsežnejše in najbolj znano delo je avtobiografski roman *Gospod Franjo*. Sam je

ta roman iz prvih let bosanske okupacije imenoval »jugoslovanski«. Delo je poželo veliko pozornost in je postalo zelo prepoznavno, saj je izšlo v burnem času po balkanskih vojnah. Oblasti so roman zaplenile, pisatelju pa je bil odvzet stotniški čin (Koblar, 2013).

Pred več kot 120 leti so Slovenci začeli prihajati v industrijska središča Bosne in Hercegovine, kot so Zenica, Kakanj, Breza, Banovići, Lukavac in Sarajevo. Z odprtjem rudnika Kreka leta 1895 se je pokazala potreba po zaposlovanju večjega števila tujih delavcev, predvsem strokovnjakov. Med njimi so bili tudi Slovenci. Prihajali niso samo rudarji, temveč tudi strokovnjaki različnih profilov (Šmid & Štrumbl, 2006, str. 160).

V Husinskem oboroženem uporuh rudarjev rudnika Kreka, poimenovanem po rudarski vasi Husin pri Tuzli, proti nasilju državnih oblasti med splošno stavko rudarjev Bosne in Hercegovine, od 21. do 28. decembra 1920, je vodstvo pripeljalo 200 rudarjev iz Slovenije. Kmalu so se tamkajšnjim rudarjem v njihovih protestih pridružili tudi Slovenci (Šmid & Štrumbl, 2006, str. 160).

V času med obema svetovnima vojnama, leta 1924, se je v Tuzlo z družino preselila še ena znana Slovenka, Amalija Lebeničnik. Bila je sodelavka slavnih revolucionarjev Roze Luxemburg in Karla Liebknechta. Svojo življenjsko pot je začela v kraju Loke v današnji občini Zagorje ob Savi, zadnji del svojega življenja pa je z možem in sinom preživela v Tuzli (Redžić, 2016, str. 12). Zaradi svoje aktivistične vloge med drugo svetovno vojno sta bila skupaj s sinom Andrijo 16. februarja 1942 ob 17. uri ustreljena (Redžić, 2016, str. 21, 43). V tistem času je v Tuzli živelo 354 Slovencev (Tešić, 2018, str. 25). V Tuzli je po Amaliji Lebeničnik poimenovana ulica, v Slavinovičih (del Tuzle) pa je dolgo časa njeno ime nosila tamkajšnja osnovna šola (Tomažič, 2023).

Med drugo svetovno vojno je bilo po podatkih, s katerimi razpolaga Muzej narodne osvoboditve Maribor, samo iz tega mesta in okolice odposlanih 14 transportov s skupno 6.092 deportiranimi osebami. Do konca septembra 1941, ko so bili ti transporti ustavljeni, je šlo skozi taborišče Slavonska Požega 30.000 ljudi. Čeprav je bila prvotno načrtovana premestitev 10.000 Slovencev v Bosno, je bil ta načrt le delno uresničen. To potrjujejo podatki o številu deportiranih iz tega kontingenta v 22 bosanskih mest. V Gračanico, mestece v današnjem Tuzelskem kantonu, so tako poslali 220 Slovencev (Hamzić, 2017, str. 121).

Po drugi svetovni vojni so v okviru načrtovanja kadrovanja iz Slovenije prihajali strokovnjaki različnih profilov, ki so veliko prispevali k razvoju Tuzle, njihovi potomci pa v tem mestu živijo še danes.

SLOVENC V TUZLI PO POPISIH 1910–2013

Z odprtjem rudnika Kreka leta 1895 so na območje Tuzle prišli prvi Slovenci. V popisu prebivalstva leta 1910 jih je bilo 186, njihovo število pa je vse do leta 1961 naraščalo, tistega leta jih je bilo največ v Tuzli – 358 (SOZVBiH, 1912; Savezni zavod za statistiku, 1961; 1967). Delež slovenskega prebivalstva v mestu Tuzla je bil največji leta 1921, ko

so Slovenci predstavljali 2,46 % celotnega prebivalstva mesta (Direkcija državne statistike, 1924; gl. Preglednico 1). Število oseb slovenskega porekla v mestu se je po vojni v obdobju 1992–1995 zmanjšalo na vsega 24 – mnogi so zaradi vojnih dogodkov zapustili Bosno in Hercegovino, veliko jih je tudi izkoristilo možnost pridobitve državljanstva in tako odšlo živeti, študirati ali delati v Republiko Slovenijo in druge države.

Leto popisa	Tuzla	Št. Slovencev	Delež (%)	VI
1910	12.035	186	1,55	100
1921	14.036	345	2,46	185,48
1931	16.708	...	...	...
1948	22.731	345	1,52	0
1953	26.672	269	1,00	77,86
1961	41.450	358	0,86	133,09
1971	58.550	247	0,42	68,99
1981	71.740	159	0,22	64,37
1991	83.770	112	0,13	77,34
2013	110.979	24	0,02	21,43

Preglednica 1: Število Slovencev v Tuzli v obdobju 1910–2013 (vir: popisi prebivalstva BiH v obdobju 1910–2013).¹

Gibanje števila Slovencev v Tuzli je razvidno iz popisov prebivalstva vse od leta 1910, ko jih je v mestu živelo 186 in so predstavljali 1,55 % vsega prebivalstva (SOZVBiH, 1912). Ta popis je vzeti za osnovo, saj zgodovinska dejstva govorijo, da so bili v mestu prisotni že veliko prej – prve Slovence v Tuzli viri navajajo že leta 1885 (Štastitika mjesta, 1886). V popisu leta 1921 je število Slovencev naraslo na 345 in so predstavljali 2,46 % vsega prebivalstva, njihovo število se je povečalo za 85,48 % (Direkcija državne statistike, 1924). V popisu iz leta 1931 podatka o njihovem številu ni, prvi popis po drugi svetovni vojni, leta 1948 v takratni FNRJ, pa je pokazal, da je v Tuzli živelo 345 Slovencev, kar je enako kot leta 1921, pri čemer pa se je njihov delež v skupnem prebivalstvu mesta zmanjšal in je predstavljal 1,52 % celotnega prebivalstva (Savezni zavod za statistiku, 1951; Savezni zavod za statistiku, 1954). V popisu prebivalstva leta 1953 se je število Slovencev zmanjšalo za 76 oseb, prav tako pa se je zmanjšal njihov delež v prebivalstvu mesta, na le še en odstotek (Savezni zavod za statistiku, 1958). V popisu leta 1961 so v mestu Tuzla našli največ Slovencev od leta 1910, ko so bili prvič zaznani v popisih prebivalstva. Takrat je v mestu živelo 358 Slovencev – njihovo število se je glede na leto 1910, torej od prvega zajetega popisa, povečalo za 168 oseb, pri čemer pa so predstavljali le še 0,86 % celotnega prebivalstva mesta (Savezni zavod za statistiku, 1961; 1967). Od leta 1961 naprej, ko

¹ Vsi kot viri uporabljeni popisi, navedeni pod preglednicami v nadaljevanju, so posamično navedeni na seznamu virov in literature.

je bilo Slovencev v mestu največ, se njihovo število stalno zmanjšuje. Leta 1971 se je v popisu prebivalstva za Slovence opredelilo 247 oseb – v mestu so predstavljali 0,42 % celotnega prebivalstva, njihov delež pa se je v primerjavi s prejšnjim popisom zmanjšal za 51,41 % (Savezni zavod za statistiku, 1974). Tudi v popisu prebivalstva leta 1981 se je njihovo število zmanjšalo, in sicer jih je bilo 159, njihov delež v mestu pa je znašal vsega 0,22 % (RZS, 1982; Savezni zavod za statistiku, 1984; Savezni zavod za statistiku, 1987). V zadnjem popisu skupne države je v Tuzli živel oziroma se za Slovence opredelilo 112 oseb. Njihov delež v mestu je znašal 0,12 % vseh prebivalcev, v primerjavi z letom 1981 pa se je zmanjšal za 42,14 % (Savezni zavod za statistiku, 1993). Vojska v obdobju 1992–1995 je vplivala na izselitev celotnega prebivalstva iz države, vključno s Slovenci. Tako jih je bilo leta 2013 naštetih 24, njihov delež v mestnem prebivalstvu pa je padel na vsega 0,02 % (Agencija za statistiku, 2013; gl. Preglednico 1).

DEMOGRAFSKE ZNAČILNOSTI SLOVENCEV V TUZELSKEM KANTONU PO POPISIH LETA 1991 IN 2013

Primerjava prisotnosti Slovencev v naseljih na območju današnjega Tuzelskega kantona (Preglednica 2) nam razkrije opazne spremembe v deležih v posameznih naseljih. Tako se je delež Slovencev v Tuzli močno zmanjšal, in sicer s 87,5 % na 47,06 %. V Banovičih je njihov delež ostal na isti ravni in predstavlja 11,76 %, v Gračanici se je povečal s 5,88 % na 9,8 % v letu 2013 (Agencija za statistiku, 2013). Število Slovencev se je opazno zmanjšalo v Gradačcu. Leta 1991 jih je bilo tam 17,65 % (Državni zavod za statistiku, 1993), v zadnjem popisu pa le še 1,96 %. V Lukavcu se njihov delež ni bistveno spremenil in ostaja 19,61 %. V Živinicah je njihov delež z 9,8 % v letu 1991 padel na 7,84 % v letu 2013. V popisu prebivalstva leta 1991 so bili Slovenci še prisotni tudi v Kalesiji (5,88 %) in v Kladnju (1,96 %), v zadnjem popisu leta 2013 pa jih v teh mestih ni več. V današnjem obsegu Tuzelskega kantona so še občine Teočak, Doboj istok/vzhod, Sapna in Čelić, kjer pa Slovenci niso bili prisotni v nobenem od primerjanih popisov. Skupno število Slovencev v Tuzelskem kantonu se je od leta 1991 do leta 2013 zmanjšalo s 158 na vsega 51 – razlogi za to so dinamika selitev, staranje ter druga demografska gibanja v tem obdobju.

Območje	Število 1991	Število 2013	Delež 1991 (%)	Delež 2013 (%)
Tuzelski kanton	158	51	100	100
Tuzla	112	24	87,50	47,06
Banovići	12	6	11,76	11,76
Gračanica	3	5	5,88	9,8
Gradačac	9	1	17,65	1,96

Lukavac	11	10	19,61	19,96
Srebrenik	2	1	3,92	1,96
Živinice	5	4	9,8	7,84
Kalesija	3	...	5,88	...
Kladanj	1	...	1,9	...

Preglednica 2: Deleži Slovencev v občinah Tuzelskega kantona v popisih 1991 in 2013 (vir: Popisa prebivalstva BiH 1991 in 2013).

Iz primerjave popisov prebivalstva na območju današnjega Tuzelskega kantona in občin (Teočak, Doboj istok/vzhod, Sapna, Čelić), ki ga sestavljajo po Daytonskem sporazumu, izhaja ključna ugotovitev, da se je število Slovencev v tem obdobju zmanjšalo za več kot dve tretjini – leta 1991 jih je bilo 158, leta 2013 pa le še 51 (Savezni zavod za statistiku, 1993; Agencija za statistiku, 2013). Relativne vrednosti nam povedo, da je razmerje med moškimi in ženskami v obeh popisih zelo podobno (1991: 37,9 % moških, 61,03 % žensk; 2013: 39,22 % moških, 60,78 % žensk). Opaziti je mogoče, da v novonastalih občinah v sestavi Tuzelskega kantona Slovencev ni bilo v nobenem izmed obeh popisov. V primeru dveh občin lahko ugotovimo, da so bili Slovenci ob popisu 1991 še prisotni (Kalesija: 3, Kladanj: 1), v zadnjem popisu pa jih v omenjenih občinah ni več (Savezni zavod za statistiku, 1996; FZS, 1998). Največ Slovencev je od nekdaj živel v Tuzli – leta 1991 112, in sicer 46 (41,07 %) moških ter 66 (58,93 %) žensk, v popisu leta 2013 pa se je njihovo število zmanjšalo na vsega 24 oseb, pri čemer so prevladovalle ženske (17 oziroma 70,82 %; Savezni zavod za statistiku, 1996; FZS, 1998). Več kot 10 Slovencev v zadnjem popisu živi tudi v Lukavcu, in sicer 4 moški in 6 žensk. V Banovićih je bilo pri popisu leta 1991 12 Slovencev, od tega 7 (58,33 %) moških in 5 (41,67 %) žensk. Danes jih v tej občini živi le še šest. Občina Gračanica je edina, kjer je po zadnjem popisu prebivalstva več Slovencev kot po popisu leta 1991 – takrat so v tej občini živele 3 ženske, danes pa 3 moški (60 %) in 2 ženski (40 %). Ob omenjenih občinah so Slovenci po zadnjem popisu prisotni tudi v Živinicah (4 osebe), po en Slovenec pa je prisoten še v Gradačcu in Srebreniku.

VERA SLOVENCEV V TUZELSKEM KANTONU V LETIH 1991 IN 2013

Slovenci in njihovi potomci, ki žive zunaj matice, se tradicionalno največkrat izrekajo za rimokatoliško in protestantsko veroizpoved. Slednjih v Tuzelskem kantonu popis sicer ni zaznal, za katolike pa se slovenski prebivalci opredeljujejo skorajda v enakem deležu kot v Sloveniji. V popisu 2002 se je za rimokatolike v Sloveniji opredelilo 57,8 % oseb.

Veroizpoved	1991	delež (%)	2013	delež (%)
Islamska	1	0,63	3	5,88
Katoliška/rimokatoliška	103	65,19	27	52,94

Agnostiki	0	0	4	7,84
Ateisti	0	0	12	23,53
Ni se izjasnil/neopredeljen	11	6,69	3	5,88
Ostali	0	0	2	3,92
Brez vere	43	27,22	0	0
Skupaj	158	100	51	100

Preglednica 3: Veroizpoved Slovencev Tuzelskega kantona, 1991 in 2013 (vir: Popisa prebivalstva BiH, 1991 in 2013).

Iz Preglednice 3 je razvidno, da se je v letu 2013 delež katoličanov v primerjavi s popisom iz leta 1991 zmanjšal s 65,19 % (103 osebe) na 52,94 % (27 oseb). Ob tem moramo poudariti, da se je število Slovencev zmanjšalo s 158 leta 1991 na vsega 51 leta 2013. Neverujočih v letu 1991 je bilo 43 oziroma 27,22 % vseh, v naslednjem popisu pa v tej kategoriji ni nobene osebe. Delež v rubriki »ni se izjasnil ali neopredeljen« je bil leta 1991 6,69 %, v popisu leta 2013 pa 5,88 % (tako so se izrekle 3 osebe). Število pripadnikov islamske veroizpovedi je blago naraslo, z 0,63 % (1 oseba) leta 1991 na 5,88 % (3 osebe) v popisu leta 2013. V zadnjem popisu so se za agnostike opredelile 4 osebe, kar predstavlja 7,84 %, za ateiste 12 oseb oziroma 23,53 %, za rubriko »ostali« pa 2 osebi oziroma 3,91 %. Ugotovimo lahko, da je verska opredelitev Slovencev glede na zadnji popis prebivalstva doživela opazne spremembe.

Iz popisa prebivalstva za leto 2013 so razvidni tudi podatki o verujočih po spolu. Za islamsko veroizpoved so se izrekli 2 moška (66,67 %) in 1 ženska (33,33 %). Za katolike se je opredelilo 10 moških (37,04 %) ter 27 žensk (62,96 %), za agnostike pa 1 moški (25 %) in 3 ženske (5 %). V rubriki »ni se izjasnil/neopredeljen« so 3 moški in nobene ženske, za ateiste pa so se opredelili 4 moški (33,33 %) in 8 žensk (66,67 %).

JEZIK SLOVENCEV V TUZELSKEM KANTONU V POPISIH PREBIVALSTVA 1991 IN 2013

Popis prebivalstva leta 2013 je ponudil omejene možnosti za opredelitev maternega jezika. Sklepiti je mogoče, da se je kar 22 Slovencev oziroma 43,13 % izbralo možnost »ostali«. Manj, 16 ali 31,37 %, jih je izbralo bosanski jezik, 8 oziroma 15,68 % pa jezik, ki so se ga naučili v času nekdanje skupne države – srbohrvaščino.

Pri primerjavi popisov prebivalstva iz let 1991 in 2013 glede slovenskega jezika je treba omeniti, da je bilo v zadnjem popisu manj možnosti izbire jezika: možna je bila izbira jezikov vseh treh osrednjih narodov (Bošnjakov, Srbov in Hrvatov), medtem ko drugih jezikov ni bilo mogoče izbirati. Popis leta 1991 je omogočal večji izbor, in Slovenci so lahko kot materni jezik navedli tudi slovenščino. Navedli so jo v 91 primerih. Pri skromni izbiri leta 2013 lahko le sklepamo, da so Slovenci izbrali

kategorijo »ostali«. Takih primerov je bilo 22. Število prebivalcev, katerih materni jezik je bosanski, se je povečalo z 9 v letu 1991 na 16 v letu 2013. Leta 2013 sta dve osebi kot materni jezik navedli srbsčino. Hrvaščine leta 1991 ni navedel nihče, v letu 2013 pa tri osebe. Število prebivalcev s srbohrvaščino kot maternim jezikom se je zmanjšalo z 52 v letu 1991 na 8 v letu 2013. Leta 1991 sta dva prebivalca kot materni jezik navedla srbohrvaščino, v naslednjem popisu pa nihče. Podobno je bilo v kategoriji »neznan«, kar je leta 1991 izbrala ena oseba, v zadnjem popisu leta 2013 pa nihče. V letu 1991 je en prebivalec kot materni jezik navedel jugoslovanščino, v letu 2013 pa take opredelitve ni bilo več. V popisu leta 1991 je ena oseba navedla še nemški jezik, slovenščino pa je istega leta kot materni jezik navedlo kar 91 oseb, kar je takrat predstavljalo 57,59 % vseh, ki so se izrekli za Slovence.

STAROSTNA IN SPOLNA STRUKTURA SLOVENCEV V TUZELSKEM KANTONU LETA 1991 IN 2013

Spolna, starostna, pa tudi etnična struktura prebivalstva so v bistvu biološki konstrukti, kvantitativni pokazatelj razmerja med moškim in ženskim prebivalstvom na eni strani ter starostne strukture tega istega prebivalstva na drugi strani (Suljić, 2011, str. 43).

Starostna struktura Slovencev v Tuzelskem kantonu je zelo neugodna. Slovensko prebivalstvo je staro – število starejših od 65 let presega 45 %. Seveda to močno vpliva na reprodukcijo prebivalstva. Ob izseljevanju Slovencev iz Bosne in Hercegovine predstavlja velik problem tudi starost pripadnikov te manjšine, in sicer tako za ohranitev prebivalstva kot tudi za delo organiziranih Slovencev v svojem društvu v Tuzelskem kantonu. Mladi predstavljajo le 3,92 %, zrelo prebivalstvo (starostna skupina 15–64 let) pa 50,98 % celotnega slovenskega prebivalstva.

Razlika v številu prebivalcev med letoma 1991 (158 Slovencev, 60 moških in 98 žensk) in 2013 (51 Slovencev, 20 moških in 31 žensk) je precejšnja. Zmanjšanje števila slovenskih prebivalcev je posledica več dejavnikov, med katerimi sta tudi staranje in migracije. Med letoma 1991 in 2013 so se življenjske razmere poslabšale zaradi vojne (1992–1995), po njej pa zaradi devastacije države, slabega ekonomskega položaja, pomanjkanja služb, slabših možnosti izobraževanja in drugih razlogov. Na zmanjšanje števila v omenjenem obdobju so vplivale selitve, ki trajajo še danes, nedvomno pa tudi naravni dejavniki, kot so rojstva, smrti in pričakovana življenjska doba. Stopnja feminizacije v letu 1991 je bila 62,3 %, medtem ko je bila v letu 2013 nekoliko nižja, 60,78 %. To pomeni, da je bilo leta 1991 delež žensk v celotnem prebivalstvu višji kot leta 2013. Na drugi strani je bila stopnja maskulinitete leta 1991 37,97 %, leta 2013 pa se je rahlo povečala na 39,22 %. To pomeni, da je bil delež moških leta 2013 nekoliko višji kot leta 1991.

Starostna skupina	Spol	Tuzelski kanton 1991	%	Starostna skupina	Spol	Tuzelski kanton 2013	%
0–14	Σ	11	6,96	0 – 14	Σ	2	3,92
	M	6	3,8		M	2	3,92
	Ž	5	3,16		Ž	0	0
15–64	Σ	113	71,52	15 – 64	Σ	26	50,98
	M	42	26,58		M	10	19,6
	Ž	71	44,45		Ž	16	31,37
65 in več	Σ	34	21,52	65 in več	Σ	23	45,10
	M	12	7,59		M	8	15,68
	Ž	22	13,92		Ž	15	29,41
Skupaj		158	100	Skupaj		51	100

Preglednica 4: Starostne in spolne skupine Slovencev v Tuzelskem kantonu, 2013 (vir: Popis prebivalstva BiH, 2013).

Primerjava demografskih podatkov o Slovencih v Bosni in Hercegovini v popisnih letih 1991 in 2013 kažejo večje število otrok (0–14) leta 1991 v primerjavi z letom 2013. Med obema popisoma se je zmanjšal delež slovenskih prebivalcev v starostni skupini 15–64 let, povečal pa se je v starostni skupini 65 let in več. Podatki zadnjega popisa tako kažejo, da se slovensko prebivalstvo stara. Po zadnjem popisu najštevilčnejša skupina prebivalstva v Tuzelskem kantonu spada v starostno skupino 15–64 let, pri čemer prevladujejo ženske. Pomemben delež prebivalstva predstavlja tudi starostna skupina 65 let in več, kjer sta deleža ženskih in moških enaka. Otroci, stari od 0 do 14 let, predstavljajo manjši delež populacije (Preglednica 4).

Mesto	Rojeni izven BiH	Rojeni v BiH	%	%
Banovići	5	7	3,16	4,43
Gračanica	3	0	1,9	0
Gradačac	8	1	5,06	0,63
Kalesija	3	0	1,9	0
Kladanj	1	0	0,63	0
Lukavac	10	1	6,33	0,63
Srebrenik	2	0	1,27	0
Tuzla	56	56	35,44	35,44
Živinice	3	2	1,9	1,27
Skupaj	91	67	57,59	42,41

Preglednica 5: Slovenci po občinah popisa 1991, rojeni v BiH in izven nje (vir: Popis prebivalstva 1991).

V Preglednici 5 je prikazano število Slovencev, rojenih v posameznih občinah, ločeno glede na to, ali so bili rojeni v Bosni in Hercegovini ali zunaj nje, kot je razvidno iz Popisa prebivalstva iz leta 1991 (Državni zavod za statistiku, 1993). V največji občini Tuzla je bilo število Slovencev, rojenih v BiH in izven BiH, enako (po 56 oseb). Skupno je bilo 67 Slovencev rojenih v BiH, 91 Slovencev pa zunaj BiH, kar nedvomno govori o migracijah Slovencev v BiH, hkrati pa kaže na njihovo teritorialno naselitev po občinah v današnjem obsegu Tuzelskega kantona.

SLOVENSKA SKUPNOST TUZLA 1993–2023

V najtežjih časih (1992–1995), ko je bila vojna v Bosni in Hercegovini na vrhuncu in so bile vse družine na robu obstoja, je skupina uglednih Slovencev v Tuzli ustanovila Iniciativni odbor z nalogo organiziranja Slovencev in njihovih potomcev v »Društvo Slovencev«: »Leta 1993, ko smo ustanovili skupnost, smo oblikovali tudi njene organe, na takratni skupščini so izvolili izvršni odbor in mene so izbrali za prvega tajnika. Gospoda Boža Kureta za predsednika iniciativnega odbora, Joška Jenka za namestnika predsednika izvršnega odbora društva, Bernardica Živković je bila finančnica« (Julijus Zupan, prvi tajnik društva SS Tuzla, *Sledi*, 26. 8. 2023; gl. Sliko 1).

S pozivom po radiu so se pobudnici Ani Lorger v štirih mesecih javili člani 660 družin, prvo spoznavno srečanje pa so organizirali v parku pred hotelom Tuzla (Tomažič, 2023).

Jaz sem mislila, da nas je nekaj sto. Veste, koliko nas je bilo čez štiri mesece. V moji sobi je bil seznam za 660 družin in 1.700 članov. Naš prvi susret je bil v parku hotela Tuzla starog in smo v parku tako na klopih sedeli in smo se prvič srečali, spoznali in se dogovorili. Gospa Majda Souček je bila ena od tistih, ki je bila v tem parku, in gospa Božana Gerčar – smo se dogovorili, kaj naprej. Rabili smo 30 Slovencev, da bi bili aktivni, da se lahko registriramo, in tako je začelo. (Ana Lorger, pobudnica ustanovitve društva, *Sledi*, 26. 8. 2023)

Združenje državljanov slovenskega porekla Tuzla je bilo ustanovljeno 19. avgusta 1993, društvo pa je delovalo na območju Tuzle, Lukavca, Živinic in Banovičev. Ob ustanovitvi je bilo v društvu 1.450 članov. Prvi predsednik je postal Ivan (Janez) Jauševac (Šmid & Štrumbl, 2006, str. 163).

Prva programska naloga je bila zagotavljanje humanitarne pomoči, tako za člane društva kot za lokalno skupnost. V obdobju 1993–1996 je bilo razdeljenih okoli 2.100 paketov humanitarne pomoči v vrednosti cca 435.000 nemških mark, zbranih pa je bilo tudi veliko donacij zdravil. Največji del zbranih zdravil in medicinske opreme je bil podarjen Univerzitetnemu kliničnemu centru Tuzla (Tešić, 2018, str. 12). »Vlada nam je dala tukajšnja semena in mi smo vse posejali in vsi parki so bili obdelani, tako da je bilo veselje, da si imel kaj za jest. Ker jaz sem rekla, da v trgovinah so

samo stalaže in nč družga. Vlada je Tuzelska tud skrbela, mel smo kartice pa smo vsak dan dobili en komad kruha in mleko, in to mleko si moral it čakati ob štirih zjutraj» (Andreja Kreco, najstarejša članica SS Tuzla, *Sledi*, 26. 8. 23).



Slika 1: Ustanovna skupščina Slovenske skupnosti Tuzla (vir: arhiv Slovenske skupnosti Tuzla).

Dejavnosti Slovenske skupnosti Tuzla

Po koncu vojne je društvo nadaljevalo z uresničevanjem svojih temeljnih ciljev, določenih s statutom društva, ki se nanašajo na ohranjanje slovenske kulturne identitete. Posebno pozornost namenjajo ohranjanju slovenskega jezika, kulture in običajev. Med številnimi dejavnostmi društva Slovenska skupnost Tuzla je pomembno izpostaviti akademije, posvečene pomembnim datumom za Republiko Slovenijo, in sicer ob državnih praznikih, dnevu kulture (8. februar), dnevu reformacije, miklavževanju (6. december) in drugih praznikih.

Delovanje Slovenske skupnosti Tuzla je danes gmotno podprto s strani Urada za Slovence v zamejstvu in po svetu, znaten del sredstev pa prispevajo tudi lokalna skupnost v Tuzli ter številni prijatelji in pokrovitelji prireditev, ki jih pripravljajo v mestu ob Jali.

Slovensko skupnost so od ustanovitve 15. septembra 1993, ko je bilo društvo vpisano v sodni register Višjega sodišča v Tuzli, vodili Ivan Jaušovec (1993–1995), Janez Rakovec (1996–2000), Slavica Pavlović (2001–2004), Marija Souček (2005–2007), Alenka Savić (2008–2012) in Dragica Tešić (2013–2022), danes pa skupnost vodi Jasmina Husanović (Tešić, 2018, str. 10).

Zborovska dejavnost

Glavne protagonistke ohranjanja identitete društva so članice ženskega pevskega zbora Slovenčice s 26 članicami. Poleg tega je treba izpostaviti večnacionalno sestavo zbora. Slovenčice so dolgo časa delovale pod vodstvom prof. Lejle Mulaosmanović (2009–2018), od decembra 2018 do februarja 2019 je zbor vodila Suzana Bako, nato pa ga je prevzela Samra Ibrahimović (Ibrahimović Mehanović, 2019, str. 43). V obdobju petnajstih let je v zboru skupaj pelo 53 pevk, med njimi so nekatere članice že od samega začetka.

Na številnih koncertih in prireditvah so sodelovali s številnimi profesionalnimi glasbeniki, od pevcev do kitaristov, klarinetistov, violinistov in pianistov. Repertoar, ki ga izvajajo, je zelo raznolik, od slovenskih tradicionalnih do sodobnih skladb, prepevajo pa tudi bosanske pesmi (Ibrahimović Mehanović, 2019, str. 43). Mnoge pevke so za svoje delo pri zboru prejele Gallusove značke. Pevski zbor Slovenčice iz Tuzle sodeluje na tradicionalnem vsakoletnem srečanju slovenskih društev v BiH (Slika 2). Še starejši je bil mešani pevski zbor Leopold Vokmer, ki je deloval med letoma 2002 in 2005 in ga je vodila prof. Evica Cerić (Tomažič, 2023). »Ponosna sem na naš zbor, ko smo postali znani. Pred tremi leti smo izdali knjigo *10 let Slovenskega zbora Slovenčice*. V Tuzli vsi poznajo Slovenčice, vsi pojejo slovenske pesmi in enkrat so me tu vprašali, kako naše članice, kjer je več Bosank, so me vprašali v Sloveniji, kako pojejo slovenske pesmi. Pa zakaj pa da ne« (Dragica Tešić, nekdanja predsednica SS Tuzla, *Sledi*, 26. 8. 2023).



Slika 2: Srečanje slovenskih pevskih zborov, 2002 (vir: arhiv Slovenske skupnosti Tuzla).

Likovna dejavnost

Na pobudo Vlatka Zimmra je bila leta 2001 ustanovljena likovna sekcija. Še pred uradno ustanovitvijo je Zimmer, ki je kasneje postal tudi vodja sekcije, na Prešernov dan leta 1999 pripravil samostojno likovno razstavo (Tešić, 2018, str. 25). Zimmer je sekcijo vodil petnajst let, nato pa sta vodenje prevzeli Borka Jokić in Melada Huseinagića. Sekcija ima od 5 do 15 članov, ki so od začetka delovanja organizirali že 20 razstav, na katerih so razstavljalo lastna dela ter dela povabljenih umetnikov iz Bosne in Hercegovine kot tudi iz drugih držav (Tomažič, 2023). Leta 2014 so ustanovili Regionalno likovno kolonijo, ki jo pripravijo vsako leto avgusta in na kateri se likovni umetniki družijo cel teden. Ob 10. obletnici leta 2024 so pripravili tudi samostojno razstavo Dragana Gačnika, predsednika Slovenskega društva Encijan iz Zenice.

Bilo je nekje od leta 1996 do 1999, leta 1999 pa sem naredil prvo samostojno razstavo, ki jo je društvo financiralo in organiziralo, in tako se je začelo. Menim, da je bil kulturni program v Tuzli izjemno dobro sprejet, bilo je veliko obiskovalcev. In tako malo po malo smo se štirje zbrali in takrat sem vodstvenim organom društva predlagal, da ustanovimo likovno sekcijo. In leta 2001 je vse skupaj zaživel. Praktično je bila likovna sekcija kot šola. (Vlatko Zimmer, nekdanji vodja likovne sekcije, *Sledi*, 26. 8. 2023)

Dopolnilni pouk slovenskega jezika

Ena od temeljnih dejavnosti Slovenske skupnosti Tuzla je dopolnilni pouk slovenskega jezika in kulture, ki v društvu ob pomoči matice poteka od samega začetka delovanja Slovenske skupnosti. Doslej so ga izvajali Slavica Pavlović, Majda Souček in Janez Rakovec (Tomažič, 2023). Vsi trije so že 1. aprila 1995 odpotovali v Slovenijo na seminar za učitelje dopolnilnega pouka slovenskega jezika v tujini. Prvi slušatelji so bili večinoma starejši člani skupnosti, kasneje so oblikovali tudi otroške skupine (Tešić, 2018, str. 15 in 16). Pouk so izvajali tudi v tedanjem oddelku v Živinicah. Leta 2024 je poučevanje prevzela Selma Tobudić. V Slovenski skupnosti Tuzla ob koncu šolskega leta pripravijo brezplačno ekskurzijo za udeležence, kar je zanje še dodatna spodbuda za učenje slovenskega jezika. Od leta 1996 naprej pa pripravljajo tudi srečanja učencev, ki obiskujejo pouk slovenskega jezika v drugih mestih Bosne in Hercegovine (Sarajevo, Banja Luka, Zenica, Kakanj, Prijedor, Doboji). Ministrstvo za vzgojo in izobraževanje Republike Slovenije vsako leto organizira poletno šolo slovenskega jezika za učence do 14. leta starosti, ki se ga udeležujejo tudi člani Slovenske skupnosti Tuzla (Tešić, 2018, str. 17).

Radi se ga učijo, imajo pa vsi te težave, da so to že tretja, četrta generacija in slovenščine doma absolutno ne uporabljajo. Tako da vse, kar se naučijo, se naučijo na teh naših urah slovenskega jezika. Zdaj že učim otroke mojih učencev. Na samem začetku

nas je bilo, celo trije učitelji smo bili. Takrat je bil en oddelek v Lukavcu, en oddelek v Živinicah. Takrat je bilo zelo masovno, veliko je bilo tistih, ki so želeli študirati v Sloveniji pa so tudi s tem namenom prihajali. (Slavica Pavlović, učiteljica slovenskega jezika, *Sledi*, 26. 8. 2023)

Založniška in medijska dejavnost

Majhna slovenska skupnost je že od samega začetka delovanja izdajala glasilo *Informator*, ki je člane obveščal o vsem pomembnem glede delovanja slovenske skupnosti. Prva številka je izšla že 23. novembra 1993. Kasneje je izdajanje zamrlo in svoje aktivnosti so predstavljali na lastni spletni strani. Ta trenutno ne deluje, a jo nameravajo ponovno vzpostaviti. Stik z javnostjo zdaj vzpostavljajo prek Facebook profila Udruženje Slovenaca Tuzla/Slovenska skupnost Tuzla.

Leta 2016 so izdali biografijo Amalije Lebeničnik avtorice mag. Asje Redžić, leta 2018 pa zgodovino in pregled lastnega delovanja v delu Dragice Tešić *25 let z vami/25 godina s vama*. Leta 2019 je izšla še monografija ženskega pevskega zbora Slovenčice *Pojemo vam že 10 let/Pjevamo vam već 10 godina* avtorice Lejle Ibrahimović Mehanović. Z zgodovino Slovencev v Tuzelskem kantonu in njihovimi dejavnostmi pa je bivša predsednica Dragica Tešić sodelovala s prispevkom v delu *Tuzlanske nacionalne manjine* (»Tuzelske nacionalne manjšine«), ki je izšlo leta 2019.

Članstvo nekoč in danes

Število članov Slovenske skupnosti se je od ustanovitve do leta 2023 zmanjšalo za 1.417 članov – leta 1993 jih je bilo v Slovensko skupnost vključenih 1.693,² danes jih je še 276 (Evidenca članstva, 2023).

Iz statistike, ki so jo vodili člani društva, je razvidno, da je bilo med njimi največ Slovencev do tretjega kolena, med člani pa so tudi pripadniki drugih narodnosti, največkrat gre za družinske člane. Takih je bilo leta 1993 1.070. Med pripadniki drugih nacionalnosti so prevladovali Bošnjaki/Muslimani (281), sledili so Hrvati (209), Srbi (136) in Črnogorci (12), 49 oseb pa se narodnostno ni opredelilo. Danes evidence o nacionalni sestavi ne vodijo več.

Razlogov za drastično zmanjšanje števila članov je veliko, od umrljivosti do izseljevanja iz Bosne in Hercegovine, nekoč pa je bilo članov več tudi zato, ker so bili mnogi včlanjeni v društvo iz nuje po prejemanju humanitarne pomoči. Današnje članstvo tako predstavlja vsega 16,3 % prvotnega števila članov Slovenske skupnosti Tuzla.

2 Od tega je bilo 639 članov slovenskega rodu, ostali pa njihovi družinski člani in drugi privrženci.

Članstvo SS Tuzla 2023 po spolu in starosti

Iz internih podatkov društva je moč razbrati tudi razmerje med spoloma v Slovenski skupnosti v Tuzli. Slabi dve tretjini članstva (173 oseb oziroma 62,68 % vseh članov) sta ženskega spola, moških članov pa je 103 oziroma 37,32 %. Evidenca članstva Slovenske skupnosti v Tuzli omogoča tudi izdelavo starostnega profila. V skupini mladih članov, torej od 0 do 19 let starosti, je 36 oseb, kar predstavlja 13,04 %, zrele populacije je 53,26 % (147 oseb), medtem ko je starejših od 60 let 93 oseb oziroma 33,7 % (Evidenca članstva, 2023). Iz pridobljenih podatkov je bilo mogoče izračunati, da je povprečna starost članov Slovenske skupnosti Tuzla 47,87 let. Indeks staranja med članstvom je 258, kar vsekakor pomeni, da se skupnost stara. Najstarejša članica Slovenske skupnosti Tuzla ima 92 let, najmlajša članica pa 7 let. »Fokus je zdaj na otrocih in za njih največ delamo projektov. Kar je moja želja, da delam na tistem povezovanju pozitivnih vrednosti, ki jih delimo s Slovenci in Bosanci, to je ljubezen do narave, pa s tem tudi čebelarstvo. Pa zdaj delamo vsako leto, praznujemo svetovni dan čebel. Letos bomo naredili lutkovno predstavo 'Če čebele izginejo'« (Jasmina Husanović, predsednica SS Tuzla, *Sledi*, 26. 8. 2023).

Teritorialna razporeditev članstva SS Tuzla glede na kraj rojstva, 2023

Leta 2023 je bilo v Slovensko skupnost Tuzla vključenih 276 članov iz petih držav (Bosna in Hercegovina, Slovenija, Srbija, Kosovo in Združeni arabski emirati) in 18 mest glede na kraj rojstva. Iz Bosne in Hercegovine je bilo 265 oziroma kar 96,02 % vseh članov. V Sloveniji je bilo rojenih 7 članov (2,53 %), v Srbiji dva člana (0,73 %), na Kosovu in v Združenih arabskih emiratih pa po en član oziroma 0,36 % (Evidenca članstva, 2023). Iz Preglednice 2 je razvidno, da so bili rojeni v 20 krajih omenjenih držav. Največ članov je bilo rojenih v Tuzli in sicer kar 237 članov. Visok odstotek v BiH rojenih Slovencev govori o drugi, tretji in tudi četrti generaciji Slovencev (Preglednica 6).

Država in kraj rojstva	Število članov	Delež (%)
BiH	265	96,02
Tuzla	237	
Šiški brod	1	
Doboj	1	
Sarajevo	1	
Živinice	1	
Banovići	2	
Lukavac	11	
Srebrenica	1	
Bijeljina	7	

Zavidovići	1	
Neznano – BiH	1	
Veliki Prnjavor	1	
Slovenija	7	2,53
Maribor	1	
Ljubljana	3	
Slovenj Gradec	2	
Celje	1	
Srbija	2	0,73
Beograd	1	
Valjevo	1	
Kosovo	1	0,36
Peć	1	
Emirati	1	0,36
Skupaj	276	100

Preglednica 6: Članstvo SS Tuzla po državi in kraju rojstva, 2023 (vir: Evidenca članstva, 2023).

Državljanstvo članstva SS Tuzla, 2023

Člani Slovenske skupnosti Tuzla so glede na pogoje pridobivanja državljanstva Republike Slovenije izkoristili možnost, ki jim je bila dana po določitih slovenske zakonodaje, pri čemer jih domači zakoni niso ovirali. Med 276 člani društva je to možnost izkoristilo 58 članov oziroma 21,01 % – ti imajo dvojno državljanstvo (bosanskohercegovsko in slovensko) – 217 članov (78,63 %) te možnosti ni izkoristilo oziroma za to nimajo ustreznih pogojev, en član (0,36 %) pa ima samo slovensko državljanstvo (Evidenca članstva, 2023). Nizek delež slovenskih državljanstev med Slovenci v Bosni in Hercegovini gre pripisati dejstvu, da jih veliko ne izpolnjuje pogojev po slovenski zakonodaji.

ZAKLJUČEK

Slovenska skupnost v Tuzelskem kantonu predstavlja pomembno etnično manjšino z bogato zgodovino, ki sega v konec 19. stoletja. Kljub številnim zgodovinskim, družbenim in političnim spremembam, vključno z vojno v Bosni in Hercegovini in posledičnim valom migracij, so člani skupnosti uspeli ohraniti slovensko narodno, kulturno in jezikovno identiteto. Analiza popisov prebivalstva iz let 1991 in 2013 kaže na izrazit demografski upad – tako številčno kot po kazalnikih starostne strukture. Razloge za upad gre iskati v vojnih razmerah (1992–1995), ki so povzročile

izseljevanje številnih družin, predvsem mladih, ter v naravnem upadanju števila prebivalstva zaradi staranja in nizke rodnosti. Dodatno številne posameznike od identifikacije s slovensko narodnostjo odvrča asimilacija v večinsko okolje. Kljub temu pa društvo Slovenska skupnost Tuzla ostaja živahno kulturno središče, ki s številnimi dejavnostmi povezuje člane različnih generacij in narodnosti ter vzdržuje vezi z matično domovino. Delo društva je primer dobre prakse organiziranosti manjšin in ohranjanja identitete v večetničnem okolju.

ZAHVALE IN DRUGI PODATKI

Prispevek in oddaja *Sledi* sta nastala ob 30-letnici delovanja Slovenske skupnosti Tuzla s podporo Urada Vlade Republike Slovenije za Slovence v zamejstvu in po svetu.

Viri za raziskovalne podatke so navedeni na seznamu virov in literature.

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SUMMARY

DEMOGRAPHIC CHARACTERISTICS OF TUZLA SLOVENIANS AND THEIR ORGANIZATION

Dušan Tomažič, Alija Suljić

The Slovenian community in the Tuzla Canton represents an important ethnic minority with a rich history dating back to the late 19th century. Despite numerous historical, social, and political changes, including the war in Bosnia and Herzegovina and the resulting wave of migration, community members have managed to preserve their Slovenian national, cultural, and linguistic identity. An analysis of population censuses from 1991 and 2013 reveals a significant demographic decline, both in terms of numbers and age structure indicators. The causes of this decline lie in the war conditions (1992–1995), which led to the emigration of many families, especially the young, as well as in the natural population decrease due to aging combined with low birth rates. Additionally, many individuals were discouraged from identifying as Slovenians due to assimilation into the majority population. Nevertheless, the Slovene Community Tuzla remains a vibrant cultural hub that, through various activities, connects members of different generations and ethnicities and maintains ties with the homeland. The work of the association serves as an example of good practice in minority organization and identity preservation within a multiethnic environment. This article and the *Sledi* TV programme were created on the occasion of the 30th anniversary of the Slovene Community Tuzla, with the support of the Government Office of the Republic of Slovenia for Slovenes Abroad.

Navodila avtorjem za pripravo prispevkov za revijo *Dve domovini / Two Homelands*

Najnovejšo verzijo navodil lahko najdete na spletni strani <https://ojs.zrc-sazu.si/twohomelands/prispevki>.

1. Usmeritev revije

Revija *Dve domovini / Two Homelands* je namenjena objavi znanstvenih in strokovnih člankov in knjižnih ocen s področja humanističnih in družboslovnih disciplin, ki obravnavajo različne vidike migracij in z njimi povezane pojave. Revija, ki izhaja od leta 1990, je večdisciplinarna in objavlja članke v slovenskem ali angleškem jeziku. Letno izideta dve številki v tiskani in elektronski obliki na svetovnem spletu (<https://ojs.zrc-sazu.si/twohomelands>).

Prispevke, urejene po spodnjih navodilih, pošljite uredništvu v elektronski obliki na naslov **dd-th@zrc-sazu.si**. Članki so recenzirani. Avtorji so odgovorni za jezikovno in slogovno dovršenost člankov. Rokopisov, ki jih uredništvo sprejme v objavo, avtorji ne smejo hkrati poslati drugi reviji. Avtorji se strinjajo, da se objavljeni članki v tiskani reviji *Dve domovini / Two Homelands* objavijo tudi v elektronski obliki na svetovnem spletu.

2. Sestavine prispevkov

Celoten članek je lahko dolg največ 60.000 znakov s presledki (vključno z literaturo) in mora vsebovati sestavine, ki si sledijo po naslednjem vrstnem redu:

- Naslov članka (okrepljeno) naj bo kratek, jasen in naj vključuje ključne pojme iz članka.
- Ime in priimek avtorja. Priimku naj sledi opomba pod črto, v kateri so s podpičjem ločeni štirje elementi:
 - avtorjeva izobrazba (na primer: 'dr. zgodovine', 'mag. antropologije');
 - ime avtorjeve institucije: Ustanova, Oddelek, Mesto (na primer: 'ZRC SAZU, Inštitut za slovensko izseljenstvo in migracije, Ljubljana');
 - avtorjev elektronski naslov;
 - šifra ORCID.
- Predlog vrste prispevka (izvirni, pregledni ali kratki znanstveni članek oz. prispevek)
- Izvleček: do 700 znakov s presledki
- Ključne besede: do 5 besed
- Izvleček v angleškem jeziku (Abstract): do 700 znakov s presledki
- Ključne besede v angleškem jeziku (Keywords): do 5 besed
- Glavno besedilo, po potrebi razdeljeno na poglavja in podpoglavja
- Zahvale in drugi podatki: Informacije o projektu oz. financiranju (če je članek nastal v okviru projekta) ter morebitne zahvale avtorja oz. avtorjev (neobvezno)
- Seznam literature (urejen po spodnjih navodilih)
- Angleški povzetek prispevka (Summary) s prevedenim naslovom (ameriško črkovanje): do 3.000 znakov s presledki

3. Oblika

- Celotno besedilo naj bo označeno s stilom »Normal« – brez oblikovanja, določanja slogov in podobnega;
- Robovi strani: »Normal« (2,5 cm na vseh štirih straneh)
- Oštevilčenje strani: z arabskimi številkami spodaj desno
- Dokument naj bo oblikovan brez prelomov strani
- Pisava:
 - Glavno besedilo: pisava Times New Roman, velikost 12 pt, obojestransko poravnava, razmak med vrsticami 1,5
 - Sprotno opombe: pisava Times New Roman, velikost 10 pt, obojestransko poravnava, razmak med vrsticami 1, oštevilčenje z arabskimi številkami

- Med odstavki naj ne bo razmaka ali praznih vrstic. Vsak odstavek (razen za podnaslovi, slikami, tabelami in izpostavljenimi daljšimi citati) naj se začne z zamikom prve vrstice za 1,25 cm.
- Naslov in podnaslov naj bodo označeni (Headings), oblikovani polkrepko (bold) in z malimi tiskanimi črkami. Podnaslovov oz. (pod)poglavij ne številčite.

V besedilih se izogibajte podčrtovanju besed oz. delov povedi ter okrepljenemu in poševnemu tisku; s poševnim tiskom označite le navedene naslove knjig, časopisov in revij. Izpust znotraj citata označite s tropičjem v oglatih oklepajih [...].

Knjižne ocene morajo imeti sestavine, ki si sledijo po naslednjem vrstnem redu: ime in priimek avtorja ali urednika knjige, ki je predmet ocene, naslov knjige, založba, kraj, leto izida, število strani. Besedilo naj obsega 5.000–10.000 znakov skupaj s presledki, na koncu sledita ime in priimek avtorja ocene.

4. Citiranje in sprotno navajanje virov

- Citati, krajši od petih vrstic, naj bodo v narekovajih in v pokončni pisavi (ne v kurzivi).
- Citati, dolgi pet ali več vrstic, naj bodo v posebnih odstavkih, zamaknjenih v levo za 1,25 cm, brez narekovajev ter v pokončni pisavi (ne v kurzivi).
- Viri naj bodo v besedilu navajani v skrajšani obliki, v celoti pa na posebnem seznamu v podpoglavju »Literatura« za glavnim besedilom (glej Točko 5). Avtorji naj tako pri sprotne navajanju virov v besedilu kot pri oblikovanju seznama literature sledijo 7. verziji standardov Ameriškega psihološkega združenja (APA7).
- V besedilu naj bodo viri navajani v oklepajih, in sicer po sistemu (*priimek avtorja/naslov vira, letnica dela, str. stran oz. razpon strani*), pri čemer je lahko priimek avtorja oz. naslov vira, če avtor ni znan, naveden tudi izven oklepaja – npr. »kot navaja Anderson (2003, str. 19) ...«.
- V primeru dveh avtorjev istega vira priimka ločimo z znakom, & – npr. (Vah & Hacin, 2011).
- V primeru treh ali več avtorjev istega vira navedemo samo prvega avtorja in dodamo kratiko ,et al.' – npr. (Besozzi et al., 2009, str. 12).
- V primeru navajanja več virov naj bodo ti med seboj ločeni s podpičji in razvrščeni naraščajoče po letnicah izdaje – npr. (Vah & Hacin, 2011, str. 251–253; Hladnik et al., 2019).
- V primeru navajanja več virov istega avtorja iz istega leta letnicam dodamo male tiskane črke – npr. (Anderson, 2003a, 2003b).

5. Urejanje seznama literature

Revija *Dve domovini / Two Homelands* sprejema strukturirane oblike seznama literature v digitalnih formatih BibTeX, RIS in JATS XML. Za urejanje literature v digitalnih formatih priporočamo uporabo računalniških programov za upravljanje z referencami, kot so Zotero, EndNote, Mendeley, Citavi ipd., s pomočjo katerih lahko seznam v strukturirani obliki prenesete oziroma izvozite kot datoteko v enem izmed zgoraj navedenih formatov.

Če literature ne morete oddati v strukturirani obliki, upoštevajte spodnja pravila in primere. Seznam literature in virov naj bo v posebnem podpoglavju »Literatura« za glavnim besedilom. V seznamu literature naj bodo navedene vse in samo tiste enote, na katere se avtor sklicuje v besedilu. Enote naj bodo razvrščene po abecednem redu priimkov avtorjev (oziroma naslovov drugih virov, pri katerih avtorji niso znani), enote istega avtorja pa razvrščene po letnicah. V primeru več virov istega avtorja iz istega leta letnice posameznih enot označite z malimi tiskanimi črkami (npr. Ford, 1999a, 1999b). Posamezne enote naj bodo oblikovane z visečim zamikom (Hanging Indent) 1,25 cm, med njimi naj ne bo razmakov.

Samostojne vire (npr. knjiga, diplomska, magistrska ali doktorska naloga, film, videoposnetek, glasbeni album, neobjavljen rokopis) pišemo v ležeči pisavi (kurzivi), ostale vire, ki so del večje celote (npr. članek v reviji ali časopisu, poglavje v zborniku, spletna stran, poglavje v enciklopediji, objava v spletnem dnevniku), pa v običajni pisavi.

Polnopomenski elementi v angleških naslovih knjig in člankov se pišejo z veliko začetnico. Enot v seznamu literature naj vsebujejo naslov DOI (<https://doi.org/...>) ali katerega od drugih stalnih identifikatorjev (ARK, URN, Handle, URI), kjer je ta na voljo. Stalni spletni naslov je v bibliografski enoti vedno zadnji podatek (glej primere spodaj).

Primeri:

- a) Knjiga:
Anderson, B. R. (2003). *Zamišljene skupnosti: O izvoru in širjenju nacionalizma*. Studia Humanitatis.
Besozzi, E., Colombo, M., & Santagati, M. (2009). *Giovani Stranieri, Nuovi Cittadini: Le Strategie di una generazione ponte*. FrancoAngeli.
- b) Zbornik:
Milharčič Hladnik, M., & Mlekuž, J. (ur.). (2009). *Krila migracij: Po meri življenjskih zgodb*. Založba ZRC, ZRC SAZU. <https://doi.org/10.3986/9789612541125>
Leitch, M. G., & Rushton, C. J. (ur.). (2019). *A new companion to Malory*. D. S. Brewer.
- c) Poglavje v zborniku:
Milharčič Hladnik, M. (2009). Naša varuška. V M. Milharčič Hladnik & J. Mlekuž (ur.), *Krila migracij: Po meri življenjskih zgodb* (str. 15–20). Založba ZRC, ZRC SAZU. <https://doi.org/10.3986/9789612541125>
- d) Članek v reviji:
Mlekuž, J. (2022). Vsakdanji nacionalizem in kranjska klobasa med slovenskimi izseljenci v ZDA. *Dve domovini / Two Homelands*, 55, 173–192. <https://doi.org/10.3986/dd.2022.1.10>
Dežan, L., & Sedmak, M. (2020). Policy and Practice: The Integration of (Newly Arrived) Migrant Children in Slovenian Schools. *Annales, Historia et Sociologia*, 30(4), 559–574. <https://doi.org/10.19233/ASHS.2020.37>
- e) Članek v časopisu:
Majovski, J. (2021, 9. marec). Testiranje za prehajanje meje ne bo plačljivo. *Primorski Dnevnik*, 5.
Woodman, D., & Power, J. (2018, 16. maj). Internships have much to offer but provisions are necessary to ensure the young truly benefit. *The Australian*, 29.
Carey, B. (2019, 22. marec). Can we get better at forgetting? *The New York Times*. <https://www.nytimes.com/2019/03/22/health/memory-forgetting-psychology.html>
- f) Predstavitev na konferenci:
Evans, A. C., Jr., Garbarino, J., Bocanegra, E., Kinscherff, R. T., & Márquez-Greene, N. (2019, 8.–11. avgust). *Gun violence: An event on the power of community* [predstavitev na konferenci]. Srečanje APA 2019, Chicago, ZDA. <https://convention.apa.org/2019-video>
- g) Spletna stran:
Lamovšek, T. (2020, 4. april). *Prišel, videl, spravil Slovence domov – Andrej Šter*. MMC RTV Slovenija. <https://www.rtvsl.si/slovenija/prisel-videl-spravil-slovence-domov-andrej-ster/519439>
Kochhar, R. (2020, 9. junij). *Hispanic women, immigrants, young adults, those with less education hit hardest by COVID-19 job losses*. Pew Research. <https://www.pewresearch.org/fact-tank/2020/06/09/hispanic-women-immigrants-young-adults-those-with-less-education-hit-hardest-by-covid-19-job-losses>
Quantum mechanics. (2019, 19. november). V Wikipedia. https://en.wikipedia.org/w/index.php?title=Quantum_mechanics&oldid=948476810

Dodatni primeri za druge vrste virov so na voljo na spletni strani <https://apastyle.apa.org/style-grammar-guidelines/references/examples>.

6. Grafične in slikovne priloge

- Preglednice oz. tabele naj bodo narejene v programu Microsoft Word in vključene v besedilo. Oblikujte jih čim enostavneje (zanje ne uporabljajte posebnih slogov).
- Vsega drugega slikovnega gradiva (fotografije, zemljevidi, ilustracije, grafi ipd.) **ne** vključujte v besedilo, temveč jih pošljite kot ločene datoteke. V izogib potrebi po naknadnih popravkih bodite pri morebitnem besedilu na slikovnem gradivu (npr. legenda grafa ipd.) pozorni na pravopis (npr. vejice za decimalna števila, stični pomišljaj za razpon števil oz. datumov, velike začetnice ipd.).
- Vse preglednice, tabele in fotografije morajo biti označene v besedilu (npr. Tabela 1, Slika 1). Točno lokacijo v besedilu navedite po naslednjem vzorcu: ... (Slika 1) ... (Preglednica 1).
- Vse preglednice in drugo slikovno gradivo mora imeti pripis, ki naj se vedno začne z naslovom Slika/Preglednica (in zaporedna številka), npr.:

Slika 1: Kuharica Liza v New Yorku leta 1905 (avtor: Janez Novak, vir: Arhiv Slovenije, 1415, 313/14)

Preglednica 1: Število prebivalcev Ljubljane po popisu leta 2002 (vir: Statistični urad RS, *Statistične informacije*, 14).
- Pripisi k slikam in preglednicam naj ne vsebujejo opomb.
- Datoteke slikovnega gradiva poimenujte s priimkom avtorja in zaporedno številko gradiva, npr.,Novak1.jpg',Novak2.jpg' itd.
- Velikost slike naj bo takšna, kot bo natisnjena, ali večja. Fotografije naj bodo v enem od naslednjih formatov: TIF, EPS, SVG, JPG, PNG v polni kakovosti in s tipografijami v krivuljah. Ločljivost slik naj bo najmanj 300 dpi.
- Za grafične in slikovne priloge, za katere nimate avtorskih pravic, morate dobiti dovoljenje za objavo in uredništvu predložiti dokazilo.

Instructions for Authors Preparing English Articles for Publication in *Dve domovini / Two Homelands*

For the latest version of instructions for authors, please refer to website <https://ojs.zrc-sazu.si/twohomelands/prispevki>.

1. Editorial Content

Dve domovini / Two Homelands welcomes scientific and professional articles and book reviews from the humanities and social sciences focusing on various aspects of migration and related phenomena. Established in 1990, the journal is multidisciplinary and publishes articles in Slovenian or English. Two volumes are published annually in print and online digital format (<https://ojs.zrc-sazu.si/twohomelands>).

Articles should be prepared according to the instructions below and sent to the editorial board at the e-mail address **dd-th@zrc-sazu.si**. All articles undergo a peer-review procedure. Authors are responsible for language and style proficiency. Manuscripts accepted for publishing by the editorial board should not be sent for consideration and publishing to any other journal. By publishing their articles in *Dve domovini / Two Homelands*, the authors also grant permission to publish them online.

2. English Article Elements

The length of the entire article can be up to 45,000 characters with spaces (including the References section) and should contain the sections below in the following order:

- Article Title (Title Case, bold): should be clear and concise and include the article's keywords.
- Name and surname of the author. The surname should be followed by a footnote with the following four elements, each separated by a semicolon:
 - o the author's education (e.g., PhD in history, MA in social sciences);
 - o the author's affiliation – Institution, Department, City (e.g., ZRC SAZU, Slovenian Migration Institute, Ljubljana);
 - o e-mail address;
 - o ORCID ID.
- Type of contribution (original, review, or short scientific article)
- Abstract: up to 700 characters with spaces (will be translated into Slovenian by the journal)
- Keywords: up to 5 words
- Main text: divided into sections and subsections, if necessary
- Information about the project or funding (if the article was written as part of a project) and any acknowledgments by the author(s) (optional)
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- Summary: up to 3,000 characters with spaces (will be translated into Slovenian by the journal)

3. Document Formatting

- The style of the entire text should be "Normal" – no formatting, defining styles, or similar.
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- Page margins: "Normal" (2.5 cm margins at all sides)
- Page numbering: Arabic numerals, bottom right
- The document should not contain any page breaks.
- Font
 - o Main text: Times New Roman, 12 pt, justified, line spacing 1.5
 - o Footnotes: Times New Roman, 10 pt, justified, line spacing 1, Arabic numerals

- There should be no spacing or blank lines between paragraphs. Each paragraph (except those after subtitles/headings, figures, tables, and long quotations) should begin with a first-line indent of 1.25 cm.
- The Title and Section (Sub-section) headings should be manually formatted: The Title and Level 1 Headings are bold, Title Case; Level 2 Headings are bold, Sentence case. Headings should not be numbered.

Avoid underlining words or parts of sentences, as well as using bold and italics. Italics should be used only when citing titles of artworks, books, newspapers, and journals. Indicate omitted parts of a citation with square brackets and an ellipsis [...].

Book reviews should contain the following elements in the order given: name and surname of the author or editor of the book, title of the book, name of publisher, place of publication, date of publication, and number of pages. Reviews should be 5,000–10,000 characters with spaces and include the name and surname of the reviewer at the end.

4. Quotations and In-Text Citations

The following instructions should be followed for citing sources in the text:

- Quotations shorter than five lines should be included in the main text and separated with quotation marks in normal font (not italics)..
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- Sources should be cited in abbreviated form in the text and in full in a separate list in the "References" section after the main text (see Section 5). Both for in-text citations and the reference list, authors should follow the 7th edition of the American Psychological Association (APA) standards (APA7).
- Cite sources using In-Text Author-Date citations in parentheses: *author's surname, year of publication: page number(s)*. Examples:
 - o citing a single source: (Anderson, 2003, pp. 91–99);
 - o citing a source with two authors: surnames separated by "&," e.g. (Vah & Hacin, 2011);
 - o citing a source with more than two authors: the surname of the first author followed by "et al.," e.g. (Besozzi et al., 2009, p. 12);
 - o citing multiple sources: sources separated by semicolons and sorted by the year of publication in ascending order (Hladnik, 2009, p. 15; Vah & Hacin, 2011, pp. 251–253; Hladnik et al., 2019);
 - o citing multiple works by the same author published in the same year: years marked with lowercase letters (Anderson, 2003a, 2003b).

5. Reference List

Dve domovini / Two Homelands accepts structured reference lists in digital formats BibTeX, RIS, and JATS XML. For editing the reference list in digital formats, we recommend the use of reference management software such as Zotero, EndNote, Mendeley, Citavi, etc., which can be used to download the list in a structured format or to export the list as a file in one of the abovementioned formats.

If you are unable to provide the reference list in one of the abovementioned formats, please follow the rules and examples below:

A list of references should appear after the main text in a separate section named "References". The reference list should include all and only those sources that are cited and referred to in the text. The entries should be arranged alphabetically by the authors' surnames (or titles of newspapers/articles or other sources where authors are unknown), with multiple references by the same author arranged by year of publication. Multiple references by a single author published in the same year should be separated with lowercase letters (e.g., Ford, 1999a, 1999b). Each entry should be formatted with a hanging indent of 1.25 cm, with no line spacing between entries.

Titles of self-contained and independent sources (e.g., a book, a master's thesis, a PhD dissertation, a film, a video, a music album, or an unpublished manuscript) should be in italics. Other sources that are part of a larger work (e.g., an article in a magazine or newspaper, a chapter in a collection of papers, a website, a chapter in an encyclopedia, or a blog post) should be written in normal font.

English book and article titles (except conjunctions, articles, and prepositions) should be capitalized in Title Case. The entries in the reference list should contain DOI addresses (<https://doi.org/...>) or any other persistent identifier such as ARK, URN, Handle, or URI when available. The permanent web address is always the last information in a reference entry (see examples below).

a) Book:

Anderson, B. R. (2006). *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. Verso.

Besozzi, E., Colombo, M., & Santagati, M. (2009). *Giovani Stranieri, Nuovi Cittadini: Le Strategie di una generazione ponte*. FrancoAngeli.

b) Edited book / Collection of articles:

Leitch, M. G., & Rushton, C. J. (Eds.). (2019). *A New Companion to Malory*. D. S. Brewer.

Moran, A., & O'Brien, S. (Eds.). (2014). *Love Objects: Emotion, Design and Material Culture*. Bloomsbury Academic. <https://doi.org/10.5040/9781474293891>

c) Chapter in an edited book / Article in a collection:

Armstrong, D. (2019). Malory and Character. In M. G. Leitch & C. J. Rushton (Eds.), *A New Companion to Malory* (pp. 144–163). D. S. Brewer.

Mihaylova-Garnizova, R., & Garnizov, V. (2018). Refugee Crisis As a Potential

Threat to Public Health. Defence Against Bioterrorism. In V. Radosavljevic, I. Banjari & G. Be-lojevic (Eds.), *NATO Science for Peace and Security Series A: Chemistry and Biology* (pp. 25–42). Springer. http://dx.doi.org/10.1007/978-94-024-1263-5_4

d) Journal article:

Vah Jevšnik, M. (2024). Navigating Integration and Emotional Distress During Vulnerable Stages of Life: The Case of Slovenian Repatriates From Venezuela. *Dve domovini / Two Homelands*, 60, 49–68. <https://doi.org/10.3986/2024.2.4>

Dežan, L., & Sedmak, M. (2020). Policy and Practice: The Integration of (Newly Arrived) Migrant Children in Slovenian Schools. *Annales, Historia et Sociologia*, 30(4), 559–574. <https://doi.org/10.19233/ASHS.2020.37>

e) Newspaper article:

Carey, B. (2019, March 22). Can We Get Better at Forgetting? *The New York Times*. <https://www.nytimes.com/2019/03/22/health/memory-forgetting-psychology.html>

Woodman, D., & Power, J. (2018, May 16). Internships have much to offer but provisions are necessary to ensure the young truly benefit. *The Australian*, 29.

Majovski, J. (2021, March 9). Testiranje za prehajanje meje ne bo plačljivo. *Primorski Dnevnik*, 5.

f) Conference presentation:

Evans, A. C., Jr., Garbarino, J., Bocanegra, E., Kinscherff, R. T., & Márquez-Greene, N. (2019, August 8–11). *Gun violence: An event on the power of community* [Conference presentation]. APA 2019 Convention, Chicago, IL, United States. <https://convention.apa.org/2019-video>

g) Website:

Price, D. (2018, March 23). *Laziness Does Not Exist*. Medium. <https://humanparts.medium.com/laziness-does-not-exist-3af27e312d01>

Kochhar, R. (2020, June 9). *Hispanic women, immigrants, young adults, those with less education hit hardest by COVID-19 job losses*. Pew Research. <https://www.pewresearch.org/fact-tank/2020/06/09/hispanic-women-immigrants-young-adults-those-with-less-education-hit-hardest-by-covid-19-job-losses>

Quantum mechanics. (2019, November 19). In *Wikipedia*. https://en.wikipedia.org/w/index.php?title=Quantum_mechanics&oldid=948476810

Additional examples for other types of sources are available at <https://apastyle.apa.org/style-grammar-guidelines/references/examples>.

6. Graphics and Illustrations

- Tables should be created in Microsoft Word and included in the text. Use simple formatting (no special builtin styles).
- All other figures (pictures, maps, illustrations, graphs, etc.) should **not** be included in the text but should be sent as separate files. To avoid unnecessary corrections in the editing phase, they should use the period (.) for decimals (i.e. 14.50), the endash (–) for number or date ranges (i.e., 2010–2019), the Oxford comma, and American English spelling.
- All figures and tables should be referenced in the main text, e.g. (Table 1), (Figure 1).
- Please add the figure captions at the exact locations where they should appear in the text.
- All tables and other visual material should be captioned, always starting with the title Figure/Table [number], for example:

Figure 1: Lisa the Cook in New York in 1905 (Photo: Janez Novak, source: Archives of Slovenia, 1415, 313/14).

Table 1: The population of Ljubljana according to the 2002 Census (source: Statistical Office of the Republic of Slovenia, *Statistics*, p. 14).

- Captions to visual material should not include footnotes.
- All digital files for visual material should be named with the author's surname and numbered, e.g., "Brown01.jpg", "Brown02.jpg".
- The size of images should be the same as they should appear in print or larger. Photos should be submitted in one of the following formats: TIF, EPS, SVG, JPG, PNG in full quality and fonts in curves. The image resolution should be at least 300 dpi.
- Permission to publish must be obtained for all copyrighted graphic and illustrative material. Please include proof of permission alongside the copyrighted visual material you submit to the editor.

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