

642026

homelands

Two

dom

vi

n

v

o

m

o

d

Inštitut za slovensko izseljenstvo in migracije ZRC SAZU

Glavni urednici / Editors-in-Chief
Kristina Toplak, Marijanca Ajša Vižintin

Odgovorna urednica / Editor-in-Charge
Marina Lukšič Hacin

Tehnični urednik / Technical Editor
Tadej Turnšek

Mednarodni uredniški odbor / International Editorial Board
Synnove Bendixsen, Ulf Brunnbauer, Aleš Bučar Ručman, Martin Butler, Daniela I. Caglioti,
Jasna Čapo, Donna Gabaccia, Jure Gombač, Ketil Fred Hansen, Damir Josipovič,
Aleksej Kalc, Jernej Mlekuž, Claudia Morsut, Ikhlas Nouh Osman, Nils Olav Østrem,
Lydia Potts, Maya Povrzanović Frykman, Francesco Della Puppa, Jaka Repič,
Rudi Rizman, Matteo Sanfilippo, Annemarie Steidl, Urška Strle, Adam Walaszek,
Rolf Wörsdörfer, Simona Zavratnik, Janja Žitnik Serafin

Lektoriranje in korektura / Copyediting and proofreading
Jana Renée Wilcoxon (angleški jezik / English)
Tadej Turnšek (slovenski jezik / Slovenian)

Oblikovanje / Design
Anja Žabkar

Prelom / Typesetting
Inadvertising d. o. o.

Založila / Published by
ZRC SAZU, Založba ZRC

Izdal / Issued by
ZRC SAZU, Inštitut za slovensko izseljenstvo in migracije /
ZRC SAZU, Slovenian Migration Institute, Založba ZRC

Tisk / Printed by
CICERO, Begunje, d.o.o.

Naklada / Printum
100

Naslov uredništva / Editorial Office Address
INŠTITUT ZA SLOVENSKO IZSELJENSTVO IN MIGRACIJE ZRC SAZU
p. p. 306, SI-1001 Ljubljana, Slovenija
Tel.: +386 (0)1 4706 485; Fax +386 (0)1 4257 802
E-naslov / E-mail: dd-th@zrc-sazu.si
Spletna stran / Website: <https://ojs.zrc-sazu.si/twohomelands>



Revija izhaja s pomočjo Javne agencije za
znanstvenoraziskovalno in inovacijsko dejavnost
Republike Slovenije in Urada Vlade Republike Slovenije
za Slovence v zamejstvu in po svetu /
Financial support: Slovenian Research and Innovation Agency and
Government Office for Slovenians Abroad

TWO home lands
MIGRATION STUDIES

DVE domovini
RAZPRAVE O IZSELJENSTVU

64 • 2026

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.

The journal ***Dve domovini / Two Homelands*** is dedicated to publishing original scientific articles about various aspects of migration. The journal was established by the Slovenian Migration Institute of the Slovenian Academy of Sciences and Arts Research Center (ZRC SAZU) in 1990 and is published twice a year in Slovenian and English. All articles are subject to double-blind peer review.

Povzetki in indeksiranje / Abstracts and indexing:

European Reference Index for the Humanities and Social Sciences (ERIH PLUS)

International Bibliography of the Social Sciences (IBSS)

IBZ Online (Internationale Bibliographie der geistes-und sozialwissenschaftlichen Zeitschriftenliteratur)

Sociological Abstracts

Scopus (d)

Letna naročnina: 25 € za posameznike, 50 € za institucije, 18 € za študentke in študente

Posamezna številka: 15 € za posameznike, 20 € za institucije, 8 € za študentke in študente

Annual subscription: 25 € for individuals, 50 € for institutions, 18 € for students

Single issue: 15 € for individuals, 20 € for institutions, 8 € for students

Mastercard / Eurocard and VISA accepted.

Naročila sprejema / Send orders to:

Založba ZRC, p. p. 306, SI-1001 Ljubljana, Slovenija; Fax: +386 (1) 425 77 94;

E-mail: zalozba@zrc-sazu.si

VSEBINA / CONTENTS

ČLANKI / ARTICLES

JANJA ŽITNIK SERAFIN

Uvodnik: Inštitut za slovensko izseljenstvo in migracije to jesen praznuje 7
štiridesetletnico priključitve k ZRC SAZU

Introduction: The Slovenian Migration Institute Celebrates 40 Years as 17
Part of the Research Centre of the Slovenian Academy of Sciences and
Arts in Autumn 2026

URH ŠELIH

Med odgovornostjo in solidarnostjo: novi solidarnostni mehanizem EU 27
in njegove meje pri prerezporejanju bremen

Between Responsibility and Solidarity: The EU's New Solidarity Mechanism
and Its Limits in Redistributing Burdens

ALENKA VRBINC, DONNA M. T. CR. FARINA, MARJETA VRBINC

Oglasi v slovarjih za slovenske priseljence v ZDA na začetku 20. stoletja 53

Advertisements in Dictionaries for Slovenian Immigrants to the
United States at the Beginning of the Twentieth Century

MATEJA CURK

Alternacija kodov v proznih delih Gorana Vojnovića 81

Code Alternation in Goran Vojnović's Prose Texts

URH FERLEŽ

Podoba domovine v delih Franceta Papeža 99

The Image of the Homeland in the Works of France Papež

MAJA RAMUŠ

Ruski general Ivan T. Beljajev v Zelenem peklu 115

Russian General Ivan T. Belaieff in the Green Hell

MOJCA VAH JEVŠNIK, SANJA CUKUT KRILIĆ

Emerging Diversifications of Labor Migration to Slovenia: 133

From the Western Balkans to Asia

Nove oblike delovnih migracij v Slovenijo: od Zahodnega Balkana do Azije

LUDĚK JIRKA

Undesirable Reverse Remittances: The Case of Young Ukrainian 153

Students in Czechia

Nezaželena povratna denarna nakazila: primer mladih ukrajinskih
študentov na Češkem

JURAJ POKOS, REBEKA MESARIĆ ŽABČIĆ, NENAD POKOS	
The Croatian Population Among the Oldest in the World: Shifts in Age Structure, 1991–2021	173
Hrvaško prebivalstvo med najstarejšimi na svetu (spremembe v starostni strukturi, 1991–2021)	
NINA BILOKOPYTOVA, KARIM EL GUESSAB, VOLODYMYR BILOKOPYTOV	
The Phenomenon of "Balkan Islam" as a Factor of Intercultural and Ethno-Social Dialogue	197
Fenomen »balkanskega islama« kot dejavnik medkulturnega in etnično-socialnega dialoga	
TAQIYEDDINE BENFIFI, NAIMA OUTALEB	
Physician Emigration and Globalization: A Market Logic and Political Economy Perspective	219
Izseljevanje zdravnikov in globalizacija: perspektiva tržne logike in politične ekonomije	

KNJIŽNE OCENE / BOOK REVIEWS

Florian Tissot, <i>Doing Family on the Move: Highly-Skilled Migrants in Switzerland and Germany</i> (Juan Paulo Gabriel Amurao)	249
---	-----

Č L A N K I A R T I C L E S

UVODNIK: INŠTITUT ZA SLOVENSKO IZSELJENSTVO IN MIGRACIJE TO JESEN PRAZNUJE ŠTIRIDESETLETNICO PRIKLJUČITVE K ZRC SAZU

Janja Žitnik Serafin¹

COBISS LL 1.20

Edini znanstveni inštitut v Sloveniji, ki se z raziskovalno dejavnostjo, pedagoškim delom in prenosom znanstvenih spoznanj v prakso od ustanovitve do danes v celoti posveča tematiki mednarodnih migracij, letos praznuje štiridesetletnico priključitve k Znanstvenoraziskovalnemu centru SAZU. Pod drugačnim imenom je pred tem, tako kot večina današnjih inštitutov ZRC SAZU, deloval neposredno pri Slovenski akademiji znanosti in umetnosti. Z ustanovitvijo ZRC SAZU leta 1981 in njegovim naglim razvojem v naslednjih letih pa so bili izpolnjeni pogoji, da se je leta 1986 kot zadnji inštitut SAZU priključil tej danes mednarodno prepoznavni znanstveni ustanovi še tedanji Inštitut za izseljenstvo SAZU, ustanovljen komaj štiri leta prej. A čeprav zgodovina današnjega Inštituta za slovensko izseljenstvo in migracije (ISIM) sega še nekoliko dlje v preteklost, v šestdeseta leta 20. stoletja, prav leto 1986 predstavlja najpomembnejšo prelomnico v njegovem delovanju.

PREDHODNIK: ŠTUDIJSKI CENTER ZA ZGODOVINO SLOVENSKEGA IZSELJENSTVA, 1963–1970

18. junija 1963 je SAZU v sodelovanju z zgodovinsko sekcijo Slovenske izseljenske matice ustanovila Študijski center za zgodovino slovenskega izseljenstva. Že naslednje leto je Sklad Borisa Kidriča začel financirati projekt »Zgodovina slovenskega izseljenstva«, ki ga je vodil omenjeni Študijski center. Prva štiri leta je ta deloval v okviru treh sekcij – arhivske, bibliografske in statistične – kot iniciativni odbor za zbiranje, objavo in znanstveno interpretacijo gradiva o slovenskem izseljenstvu. Delovnim skupinam so se pridružili še geografi, zgodovinarji, sociologi idr. iz različnih ustanov (NUK, Zavod za statistiko, Državni arhiv Slovenije ...), njegov Znanstveni svet pa je vodil akademik dr. Fran Zwitter. Center je na ta način sorazmerno učinkovito deloval brez lastnih prostorov in zaposlenih kadrov. Sledile so predstavitve rezultatov: razstava izseljenskega tiska in fotografij o pomoči izseljencev domovini v času druge svetovne vojne, odprte spominske sobe Louisa Adamiča v njegovi rojstni hiši, izdelava obsežnega, vsestransko uporabnega statističnega elaborata o izseljevanju

¹ dr. literarnih znanosti, znanstvena svetnica ZRC SAZU v pokoju, janja.serafin@gmail.com

iz slovenskega etničnega prostora od sredine 19. stoletja do prve svetovne vojne¹ ter objava bibliografij slovenske izseljenske periodike do leta 1945 avtorja Jožeta Bajca. Edino v letih 1968–1970 je Študijski center imel redno zaposlenega raziskovalca s področja zgodovinopisja, zatem je njegova dejavnost usahnila. Leta 1973 so še zadnjič, a tokrat neuspešno, poskusili znova zagnati njegovo delovanje (Čebulj - Sajko, 1990, str. 11–14).

INŠTITUT ZA IZSELJENSTVO PRI SAZU (1982–1986)

Septembra 1981 je v Ljubljani potekal mednarodni simpozij ob tridesetletnici smrti Louisa Adamiča, priznanega ameriškega pisatelja slovenskega rodu. Prof. Ivo Fabinc, tedanji rektor ljubljanske univerze, je v uvodnem govoru poudaril, da je bil Adamič »prvi znanstveni preučevalec in vidni predstavnik« slovenskega izseljenstva (Fabinc, 1981, str. 5). Diskusija udeležencev je prinesla pobudo za ustanovitev znanstvenega inštituta za interdisciplinarno raziskovanje slovenskega izseljenstva, ki bi presegalo dotedanje zbiranje gradiva in bolj ali manj faktografske objave. Program inštituta naj bi vključeval tudi nadaljnjo znanstveno relevantno osvetlitev Adamičevega življenja, njegovega literarnega dela, družbene vloge in mednarodnega pomena (Žitnik Serafin, 2017, 22–23).

Pobuda je tokrat obrodila sadove. Inštitut za izseljenstvo pri SAZU je bil ustanovljen leta 1982, leto dni po pobudi udeležencev omenjenega simpozija, s ciljem oblikovanja in izvajanja večdisciplinarnega raziskovalnega programa za to tematsko področje. Vodil ga je predstojnik (takrat upravnik), akademik dr. Janez Stanonik, ki je bil tudi organizator simpozija o Louisu Adamiču. Vodstvo Znanstvenega sveta inštituta so, tako kot v primeru predhodnega Študijskega centra, zaupali akademiku dr. Franu Zwitteru. Inštitut, ki je prav v štirih letih svojega obstoja pred priključitvijo k ZRC SAZU pridobil večino svojih izseljenskih arhivskih in časopisnih zbirk, je že ob ustanovitvi dobil lastne prostore na Novem trgu 3 ter leta 1983 uradno postal osrednji dokumentacijski center v Sloveniji za zbiranje arhivskega gradiva o slovenskih izseljencih (Žitnik Serafin, 2002, str. 228). Njegovo tričlansko delovno skupino sva poleg honorarno zaposlene dokumentalistke Mile Šenk, nekdanje sodelavke Slovenske izseljenske matice, sestavljali še sociologinja dr. Silva Mežnarič (zaposlena 1984–1986) in avtorica tega prispevka kot mlada raziskovalka s primarno nalogo preučitve nastanka Adamičeve zadnje knjige *Orel in korenine*, dolgoročno pa za področje književnosti in kulturne dejavnosti slovenskih izseljencev.

Dokumentalistka je urejala in z novimi pridobitvami nenehno dopolnjevala arhivske fonde inštituta ter zbirko slovenske izseljenske periodike. Na dveh posvetih, ki ju je inštitut leta 1985 organiziral z raziskovalci slovenskega izseljenstva iz

1 Gre za tipkopis iz leta 1965 z naslovom »Statistični podatki o izseljevanju s slovenskega ozemlja: doba od srede 19. stoletja do prve svetovne vojne«. Avtor elaborata, ki ga hrani ISIM ZRC SAZU, je Živko Šifrer, vodja statistične sekcije tedanjega Študijskega centra.

drugih ustanov, so udeleženci organizatorju zaupali vlogo koordinatorja raziskav na tem področju. Široka mednarodna mreža sodelavcev ustanovitelja in predstojnika inštituta, akademika Stanonika, je t. i. »Nonijevemu inštitutu«, kot so ga pogovorno poimenovali domači in tuji Stanonikovi kolegi, prinesla nove zunanje povezave. Ob obilici zbranega gradiva (kot tudi evidentiranih fondov in zbirk zunaj inštituta) ter ob izraziti razpršenosti zainteresiranih preučevalcev izseljenskega gradiva se je na novem inštitutu pojavila potreba po nadaljnjih zaposlitvah raziskovalcev s področij različnih humanističnih in družboslovnih znanosti, kar pa je bilo v okviru SAZU ob tedanjem načinu financiranja neizvedljivo (Čebulj - Sajko, 1990, str. 14–17; Žitnik Serafin, 1996, str. 265–266).

INŠTITUT ZA SLOVENSKO IZSELJENSTVO ZRC SAZU (1986–2009)

3. novembra 1986 se je Inštitut za izseljenstvo pri SAZU priključil Znanstvenoraziskovalnemu centru SAZU, saj so se mu s tem odpirale mnogo boljše možnosti za načrtovani večdisciplinarni kadrovski razvoj. Preimenoval se je v Inštitut za slovensko izseljenstvo ZRC SAZU (ISI). Akademik Stanonik, ki je prehod raziskovalne enote izvedel skupaj z vodstvom ZRC, se je moral ob tedanjih pogojih za zaposlitev predstojnikov inštitutov ZRC SAZU odpovedati nadaljnjemu neposrednemu vodenju svojega inštituta, a je do svoje smrti kot član Znanstvenega sveta inštituta prispeval k usmerjanju njegovega dela (Žitnik Serafin, 2017, str. 23–24). Po letu 1986 so ISI vodili predstojnik in predstojnice Andrej Vovko (1987–1991), Janja Žitnik Serafin (1992–1994), Irena Gantar Godina (1994–1999) in Marina Lukšič Hacin (od leta 1999).

Po odhodu dokumentalistke in sociologinje leta 1986 sem na ISI ostala samo avtorica tega prispevka, a je kmalu po priključitvi k ZRC SAZU sledilo obdobje nagle kadrovske razširitve. Do leta 1990, ko je inštitut začel izdajati revijo *Dve domovini: razprave o izseljenstvu* / *Two Homelands: Migration Studies*, osrednjo slovensko znanstveno revijo za področje mednarodnih migracij, so na njem dobili redno zaposlitev dva zgodovinarja, dve mladi raziskovalki (etnologinja leta 1987 ter sociologinja leta 1989) ter strokovna delavka. Ambicioznost tega izdajateljskega projekta kaže na izjemen ustvarjalni zagon tedanje petčlanske raziskovalne skupine, ki pa je bila še vedno skromna in neizkušena, brez formiranih raziskovalcev (prva mlada raziskovalka in prvi zgodovinar sva doktorirala leta 1992, drugi zgodovinar leto dni pozneje, novi mladi raziskovalki pa v letih 1995 oziroma 1998). Do konca devetdesetih let 20. stoletja so sledile zaposlitve še ene zgodovinarke ter dveh mlajših raziskovalcev, prvega s področja novinarstva in političnih ved, drugega pa za področji geografije in kulturne antropologije. V naslednjem desetletju se je kadrovska sestava ISI nekajkrat spremenila – dva raziskovalca sta zapustila ZRC SAZU, z novimi zaposlitvami pa je inštitut svoj nabor znanstvenih disciplin razširil še na umetnostno zgodovino, socialno delo in druga področja. Leta 2001 je ISI začel poleg tedaj že sorazmerno dobro sprejete znanstvene revije izdajati še knjižno zbirko *Migracije*, ki ji je leta

2009 dodal še podzbirko *Migrantke*. Leta 2006 je svoje arhivske zbirke predal Arhivu Republike Slovenije.

V desetletju 1992–2002 je še vedno sorazmerno majhna raziskovalna skupina (6–8 raziskovalcev) ob nepogrešljivi pomoči strokovne sodelavke Špele Marinšek organizirala šest večdnevni mednarodnih konferenc na temo izseljenstva, sezonstva in kulturno-umetniških dejavnosti v diasporah.² Leta 1999 je ISI v skladu z obsegom svojih dotedanjih temeljnih raziskovalnih projektov, potekajočih v obdobju 1993–1998, pridobil financiranje raziskovalnega programa »Narodna in kulturna identiteta slovenskega izseljenstva«, ki neprekinjeno poteka že 28 let (od leta 2013 z vsebinsko dopolnjenim naslovom).

Leta 2002, v času zadnjega klasičnega popisa prebivalstva v Sloveniji in ponovnega porasta ksenofobnega vzdušja znotraj slovenske nacionalne večine, je ISI v svoj raziskovalni interes postopoma začel vključevati tudi vprašanja položaja priseljencev iz jugoslovanskega prostora v Sloveniji in njihovih potomcev.³ Vrhunec odpora Slovencev do priseljencev iz nekdanjih bratskih republik se je prepričljivo odrazil že leta 1999 v reakcijah na odločbo Ustavnega sodišča RS o nezakonitosti izbrisa državljanov drugih republik iz registra stalnih prebivalcev Slovenije, še bolj pa leta 2004 v izidu referenduma o »tehničnem zakonu« za ureditev pravic izbrisanih. Zakon je bil ob 31-odstotni volilni udeležbi zavržen s skoraj 95-odstotno večino glasov.

Sodelavci ISI so se vključili v senzibilizacijo večinskega prebivalstva v Sloveniji za prepoznavanje vsakršnih kršitev človekovih pravic ter drugih oblik diskriminacije največjih etničnih skupin priseljencev v to državo. V svoje razprave smo začeli vpeljevati zrcalne primerjave položaja nekdanjih slovenskih beguncev oziroma izseljencev iz Slovenije na eni strani ter priseljencev v Slovenijo, starih in novih, na drugi. S tem smo poskušali čim bolj nazorno problematizirati dvojna merila, ki človeka pogosto zavedejo v prepričanje, da je vse, kar je »naše«, neprimerljivo z vsem drugim. S predstavitvijo poročila *Lively visions, ossified realities: co-cultures in Slovenia* na letni konferenci Združenja evropskih institucij za migracije (AEMI) na Odprti univerzi v Lizboni septembra 2003 ter z vabljenim zastopanjem Slovenije na konferenci *A Common European Migration Policy: A Common Policy for Different Problems* (Leuven, Belgija) novembra istega leta je ISI v očeh mednarodne strokovne javnosti napravil še en korak v smeri preseganja svoje vloge osrednjega inštituta za preučevanje slovenskega izseljenstva ter znova opozoril nase kot na suverena udeleženca mednarodnih diskusij o izzivih sodobnih migracij.

V obdobju 2004–2007 je na ISI potekalo izvajanje prvega temeljnega raziskovalnega projekta o položaju priseljencev v Sloveniji ter o njihovem literarnem ustvarjanju in kulturnem delovanju. Leto dni po zaključku tega projekta je geograf, etnolog in kulturni antropolog, zaposlen na ISI, uspešno zagovarjal doktorsko

2 Konferenca so potekale v Ljubljani leta 1992, v Portorožu v letih 1995, 1998 in 1999, v Gozd Martuljku leta 2001 ter v Radencih leta 2002.

3 S to tematiko se je tedaj ukvarjalo predvsem nekaj raziskovalcev na ljubljanskih Inštitutu za narodnostna vprašanja in Mirovnem inštitutu.

disertacijo na temo, ki je vključevala določene vidike omenjene tematike. Vse od odhoda dr. Silve Mežnarič z inštituta leta 1986 do začetka tega stoletja so bila na ISI pereča vprašanja problematičnega odnosa slovenske nacionalne večine do določenih priseljenjskih narodov, njihovih jezikovnih pravic, verskih tradicij in kulturnih vrednot odrinjena na rob. Inštitut je začel razmišljati o vsebinski dopolnitvi svojega raziskovalnega programa, s tem pa tudi o dopolnitvi svojega imena.

INŠTITUT ZA SLOVENSKO IZSELJENSTVO IN MIGRACIJE ZRC SAZU (OD 2009)

Predlog o dopolnitvi imena inštituta je bil uradno potrjen leta 2009, do vsebinske dopolnitve raziskovalnega programa ISIM pa je postopoma prihajalo že prej. Od začetka projektnega financiranja raziskovalnega dela v Sloveniji leta 1993 do leta 2009, tj. v šestnajstih letih, je raziskovalna skupina, ki je v tem obdobju združevala 4–12 raziskovalcev, uspešno zaključila 31 raziskovalnih, ciljnih in aplikativnih nacionalnih in mednarodnih projektov, v veliki večini na temo slovenskega izseljenstva, vse bolj pa so projekti vključevali tudi teme, povezane z migracijami drugih narodov. Od tedaj do danes, tj. v naslednjih 17 letih, je skoraj trideset raziskovalcev ISIM (današnja raziskovalna skupina skupaj z deseterico nekdanjih sodelavcev, začasno zaposlenih v tem vmesnem obdobju),⁴ zaključila še 70 različnih nacionalnih, čezmejnih, bilateralnih, medregijskih ter širših mednarodnih raziskovalnih in aplikativnih projektov.

Vsebinska teh že zaključenih raziskav se razteza od tematik s področja nekdanjih in današnjih slovenskih migracij (kot so npr. nadzor nad slovenskimi izseljenci med svetovnima vojnama, slovenske skupnosti v ZDA, »beg možganov«, potomci slovenskih izseljencev v BiH, slovenske in hrvaške skupnosti v diaspori, nekdanje in današnje migracije med Slovenijo in Avstrijo, sodobne strategije slovenskih izseljencev za ohranjanje etnične identitete ...) do migracij, mobilnosti in integracije v najširšem pomenu (npr. napotovanje delavcev znotraj EU ter iz tretjih držav, opolnomočenje migrantov in prevajanje kulturnega jezika za njihovo vključevanje, izobraževanje za odrasle begunce, vključevanje beguncev na trg dela itd.). Vendar so po obsegu in neposrednem družbenem vplivu v tem obdobju izstopali predvsem izobraževalni projekti. Člani raziskovalne skupine so skupaj z domačimi in tujimi partnerji razvijali inovativne izobraževalne strategije, »da bi se okrepila politična participacija in aktivno državljanstvo priseljencev in etničnih manjšin in promoviralo aktivno državljanstvo« (Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, b. d.). Promovirali so medkulturne vrednote kot temelje oblikovanja in razvijanja odnosov v večetnični in večjezični družbi. Ustvarili so didaktično in informativno

4 Zaradi obilice začasnih zaposlitev (t. i. projektnega zaposlovanja) je za to obdobje značilna izrazitejša kadrovska fluktuacija na ISIM.

gradivo, priročnike, publikacije, igre itd. za vzgajanje k različnosti in medkulturnosti v šolskem in univerzitetnem okolju ter jih posredovali mladim in učnemu kadru na vseh stopnjah izobraževanja (Spletna stran ISIM, O inštitutu: Medkulturni odnosi, Step in!, Eduka). V okviru projekta »Le z drugimi smo« (2016–2021), usmerjenega h krepitvi socialnih in državljskih kompetenc strokovnih delavcev, ki ga je ISIM izvedel s Pedagoškim inštitutom in sodelujočimi organizacijami, je na petih 16-urnih seminarjih sodelovalo več kot 10.200 strokovnih in vodstvenih pedagoških delavcev v slovenskih vrtcih, osnovnih in srednjih šolah ter ljudskih univerzah (Vižintin, 2022; Le z drugimi smo, 2021, str. 2).

Trenutno je na ISIM 19 redno zaposlenih sodelavcev; prevladujejo formirani raziskovalci, ki v izvajanje svojih projektov in programa tesno vpenjajo mlade raziskovalce, asistente in strokovne delavke. Uspešno nadaljujejo z izdajanjem znanstvene revije *Dve domovini / Two Homelands*, priložnost za pridobivanje uredniških znanj in veščin pa lahko na ISIM dobi vsak raziskovalec. Prvi glavni uredniki znanstvene revije so bili Andrej Vovko (1990–1992), Marjan Drnovšek (1993–1995), Janja Žitnik Serafin (1996–2000) in spet Marjan Drnovšek (2001–2007), nato pa so se v funkciji glavnega urednika izmenjavali souredniki Jure Gombač, Jernej Mlekuž in Kristina Toplak (2008–2015). Sledile so Mirjam Milharčič Hladnik (2015–2023) ter sourednici Kristina Toplak in Marijanca Ajša Vižintin (od 2024). Revija je bila konec leta 1999 vključena v prve štiri mednarodne baze podatkov za citiranje in indeksiranje, do danes pa se je uveljavila kot vplivna in sorazmerno pogosto citirana znanstvena revija, v kateri zadnja leta že prevladujejo tuji avtorji.

ISIM še naprej izdaja prav tako odmevno monografsko zbirko *Migracije* s podzbirko *Migrantke*, ki ob zavzetem delu njenih nekdanih in novejših urednikov – Janje Žitnik Serafin (2001–2008), Jerneja Mlekuža (2008–2014), Alekseja Kalca (2014–2019) in od tedaj naprej znova Jerneja Mlekuža – že četrto stoletja uresničuje napovedane cilje. V zbirki je doslej izšlo 33 znanstvenih monografij, vendar se je tempo njihovega izhajanja sčasoma precej spremenil. Frekvenca izdaj iz obdobja prvih osmih let (povprečno dva zvezka letno, skupno 16 zvezkov do leta 2008) se je namreč v nadaljnjih 18 letih (povprečno en zvezek letno, skupno 17 monografij) prepolovila. Vzrok za to so verjetno spremembe v notranjih razmerjih kombiniranega sistema domačega in evropskega sofinanciranja raziskovalnega dela, ki v določenih obdobjih v praksi bolj podpira temeljne raziskave in znanstvene objave, v drugih obdobjih pa odpira več možnosti za aplikativne projekte in strokovne objave.

Večina sedanjih raziskovalcev je vključenih v raziskovalni program »Narodna in kulturna identiteta slovenskega izseljenstva v kontekstu raziskovanja migracij«, ki – kot že omenjeno – neprekinjeno poteka od leta 1999, medtem ko dve raziskovalki sodelujeta v raziskovalnem programu »Dediščina na obrobjih: novi pogledi na dediščino in identiteto znotraj in onkraj nacionalnega«. ISIM poleg tega izvaja še devet (nacionalnih, bilateralnih in evropskih) raziskovalnih in aplikativnih projektov, med katerimi je kar tretjina zgodovinopisnih. Ti obsegajo preučevanje zgodovine migracij v jugovzhodni in srednji Evropi, zgodovino izseljenskih politik v Sloveniji in

na Hrvaškem ter države in diaspore v prvi in drugi Jugoslaviji. Preostalih šest poteka-jočih projektov se posveča mobilnim praksam delavcev, ki delujejo med Slovenijo in drugimi državami EU, reševanju sodobnih izzivov zaposlovanja migrantov in njihovega družbenega umeščanja, zlasti v njihovem delovnem okolju, iskanju optimalnih ukrepov na področju urejanja stanovanjskih razmer migrantov v Evropi ter drugim aktualnim vidikom družbenega vključevanja migrantov (poklicno usposabljanje, podpora pri ustanavljanju podjetij ...).

Raziskovalci ISIM še naprej širijo mrežo znanstvenega in pedagoškega sodelovanja z domačimi in tujimi univerzami in raziskovalnimi inštituti, mednarodnimi znanstvenimi združenji, pogosto tudi z osnovnimi in srednjimi šolami, nevladnimi organizacijami, azilnimi centri, različnimi lokalnimi in državnimi upravnimi telesi, izseljenskimi in priseljenskimi kulturnimi organizacijami, društvi in ustanovami itd. Tako kot v preteklosti tudi danes redno organizirajo mednarodne znanstvene konference in strokovne posvete, k izmenjavi znanstvenih rezultatov pa prispevajo tudi z redno udeležbo na pomembnih znanstvenih srečanjih v tujini. Kjer je to mogoče, v pripravo in izvajanje svojih projektov, dogodkov, razstav, izobraževanj ipd. enakovredno vključujejo tako slovenske izseljence in njihove potomce kot tudi priseljence in begunce v Sloveniji. Sodelujejo pri pripravi zakonskih predlogov, učnih programov in programov sofinanciranja kulturnih in drugih dejavnosti slovenskih izseljencev in priseljencev v Slovenijo. Svoje raziskovalne rezultate predstavljajo strokovni javnosti v monografijah in člankih, objavljenih pri vodilnih evropskih in tujih založbah, v uglednih mednarodnih revijah s področja migracij in integracijskih strategij (*Journal of Ethnic and Migration Studies*, *Central and Eastern European Migration Review*, *European Journal of Inclusive Education*, *Journal of Migration History*, *Dve domovini / Two Homelands* idr.) ter v osrednjih periodičnih publikacijah svojih primarnih znanstvenih disciplin. Strokovno in najširšo javnost seznanjajo s svojimi rezultati v priročnikih, poljudnoznanstvenih predstavitev v različnih javnih medijih, kot gostje radijskih in televizijskih oddaj itd.

V srednjeročni Strategiji ISIM, načrtovani za obdobje 2021–2026, so nazorno povzeti osrednji dolgoročni cilji inštituta:

Iz ozkega fokusa na slovensko izseljenstvo v preteklosti se je danes raziskovanje razširilo še na področja priseljevanja, integracije, multikulturalizma in drugih s selitvami povezanih pojavov. [...] Inštitut je bil vse od začetka zasnovan večdisciplinarno in še danes deluje na tem temelju, ki ga nadgrajujemo z meddisciplinarnimi preučevanji selitvenih fenomenov. [...] V svojem delu smo vedno sledili konceptualnim in metodološkim spremembam in novim pristopom v migracijskih študijah v mednarodnem prostoru. Raziskovalni pristopi temeljijo že desetletja na razumevanju selitev kot enem od konstitutivnih družbenih pojavov, ki zaznamuje družbena, socialna, kulturna, gospodarska idr. dogajanja na lokalni, regionalni, nacionalni in globalni ravni. Za prenos našega znanja na različne zainteresirane javnosti je pomembno, da je več naših raziskovalk in raziskovalcev že desetletja vpetih v pedagoški proces

v formalnih in neformalnih izobraževalnih okoljih, v katerih si prizadevamo, da bi dosegli boljše razumevanje današnjih selitvenih fenomenov in prispevali k senzibilizaciji družbenega okolja. [...] S celovitim pristopom bomo tudi v prihodnje delovali kot znanstveni in družbeni subjekt, ki je s specifičnimi kompetencami odgovorno vpet v dogajanje vse bolj mobilnega in globalno povezanega sveta. (Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, 2021, str. 4)

Do nedavnega smo v celotnem znanstvenem opusu raziskovalne skupine ISIM pogrešali predvsem čim bolj integralne pregledne študije in najširše sinteze znanstvenih spoznanj o slovenskem izseljenstvu. Ta dolg je bil v zadnjih nekaj letih že skoraj poravnán z izdajo dveh preglednih monografij, ki poskušata z različnih vidikov čim bolj celovito zaobjeti gospodarsko, socialno in kulturno zgodovino slovenskega izseljenstva od srede 19. stoletja do nastanka slovenske države leta 1991. To sta *Doba velikih migracij na Slovenskem* (Kalc et al., 2020) in *Slovenske selitve v socializmu* (Lukšič Hacin, 2024). Prva, ki je bila pred dvema letoma ponatisnjena, sočasno pa je pri mednarodni založbi Peter Lang izšel njen angleški prevod *Daring Dreams of the Future: Slovenian Mass Migrations 1870–1945* (Kalc et al., 2024), zajema omenjeno obdobje do konca druge svetovne vojne, druga pa povzema rezultate raziskav o prostovoljnih in prisilnih migracijah v slovenskem prostoru ter o organiziranosti slovenske diaspore po svetu v obdobju 1945–1991.

Kot sem zaključila svoj zapis že ob neki drugi priložnosti, je »brez razumevanja preteklih izkušenj slovenskih izseljencev in beguncev za domačo javnost verjetno težko dojeti položaj ljudi, udeleženih v današnjih migrantskih premikih proti Evropi in vanjo« (Žitnik Serafin, 2017, str. 32). Del dolga, ki za zdaj ostaja, je tretji del načrtovane trilogije – pregledna interdisciplinarna predstavitev slovenskih migracij še v aktualnem obdobju samostojne Slovenije. S tem bo v celoti uresničen osnovni predpogoj za relevantne primerjalne raziskave, predvsem pa za še učinkovitejše posredovanje preteklih izkušenj in spoznanj o slovenskem izseljenstvu sedanjim rodovom, ki se vedno znova soočajo s situacijami, primerljivimi z nekdanjimi (Žitnik Serafin, 2017, str. 32). Objava celovitega pregleda slovenskega izseljenstva je namreč vse od priključitve k ZRC SAZU dalje predstavljala eno glavnih poslanstev ISIM.

Danes je Inštitut za slovensko izseljenstvo in migracije ZRC SAZU v domači splošni in mednarodni strokovni javnosti prepoznan kot znanstveno relevanten in operativno učinkovit družbeni subjekt, ki ob temeljitem poznavanju in razumevanju preteklosti in sedanjosti ter ob upoštevanju najnovejših konceptualnih in metodoloških tokov neodvisne mednarodne humanistike in družboslovja z odločnimi posegi v aktualne razmere vpliva na sedanjost in posredno na prihodnost. S tem ostaja pomemben dejavnik pri družbenem ozaveščanju. Današnji čas je prepoln umetno ustvarjenega strahu, sovraštva in brezbrčnosti. Zgodovina nas uči, da se iz zgodovine naučijo karkoli koristnega za človeštvo predvsem tisti, ki imajo premalo vpliva tu in zdaj. A to nas ne sme odvrniti od nenehnega prepoznavanja, izpostavljanja in upoštevanja bistvenih družbenih zakonitosti, ki se v stoletjih vedno znova

potrjujejo. Brez tega bi ugasnil še zadnji šibki žarek, ki v realnejši luči osvetljuje našo razburkano sedanjost.

VIRI IN LITERATURA

- Čebulj - Sajko, B. (1990). Preteklo in sedanje delovanje Inštituta za slovensko izseljenstvo. *Dve domovini / Two Homelands*, 1, 11–20. <https://ojs.zrc-sazu.si/twohomelands/article/view/13069>
- Fabinc, I. (1981). Otvoritveni govor dr. Iva Fabince, rektorja Univerze Edvarda Kardelja v Ljubljani. V J. Stanonik (ur.), *Louis Adamič: Simpozij: Symposium* (str. 3–5). Univerza Edvarda Kardelja v Ljubljani.
- Inštitut za slovensko izseljenstvo in migracije ZRC SAZU. (2021). *Strateški načrt Inštituta za slovensko izseljenstvo in migracije ZRC SAZU, 2021–2026*. <https://isim.zrc-sazu.si/sites/default/files/Strategija%20ISIM.pdf>
- Inštitut za slovensko izseljenstvo in migracije ZRC SAZU. (b. d.). *Step in!* <https://isim.zrc-sazu.si/sl/strani/step-in>
- Kalc, A., Milharčič Hladnik, M., & Žitnik Serafin, J. (2020). *Doba velikih migracij na Slovenskem*. Založba ZRC. <https://doi.org/10.3986/9789610502630>
- Kalc, A., Milharčič Hladnik, M., & Žitnik Serafin, J. (2024). *Daring Dreams of the Future: Slovenian Mass Migrations 1870–1945*. Peter Lang.
- Le z drugimi smo. (2021). *Zaključno poročilo 2016–2021*. <https://lezdrugimismo.si/uploads/files/Zaključno%20poročilo.pdf>
- Lukšič Hacin, M. (ur.). (2024). *Slovenske selitve v socializmu*. Založba ZRC. <https://doi.org/10.3986/9789610509103>
- Vižintin, M. A. (2022). Uvod: Le z drugimi smo: Migracije in izobraževanje. *Dve domovini / Two Homelands*, 56, str. 127–130. <https://doi.org/10.3986/dd.2022.2.09>
- Žitnik Serafin, J. (1996). Desetletnica delovanja Inštituta za slovensko izseljenstvo ZRC SAZU. *Dve domovini / Two Homelands*, 7, 265–267. <https://www.dlib.si/details/URN:NBN:SI:doc-1RJU0GD9>
- Žitnik Serafin, J. (2002). Dvajset let Inštituta za slovensko izseljenstvo. *Dve domovini / Two Homelands*, 16, 227–233. <https://www.dlib.si/details/URN:NBN:SI:doc-IIB9P2TO>
- Žitnik Serafin, J. (2017). Razvoj Inštituta za slovensko izseljenstvo in migracije ZRC SAZU in njegov prispevek k izseljenskim študijam. V J. Žitnik Serafin & A. Kalc (ur.). *Raziskovanje slovenskega izseljenstva: vidiki, pristopi, vsebine* (str. 21–34). Založba ZRC. <https://doi.org/10.3986/9789610500414>

INTRODUCTION: THE SLOVENIAN MIGRATION INSTITUTE CELEBRATES 40 YEARS AS PART OF THE RESEARCH CENTRE OF THE SLOVENIAN ACADEMY OF SCIENCES AND ARTS IN AUTUMN 2026

Janja Žitnik Serafin¹

COBISS LL 1.20

The only research institute in Slovenia that—from its founding to the present—has been entirely devoted to the themes of international migration through its research activities, teaching, and practical application of scholarly knowledge is celebrating its fortieth anniversary as part of the Research Centre of the Slovenian Academy of Sciences and Arts (ZRC SAZU). The institute had previously operated—under another name—within the Slovenian Academy of Sciences and Arts (SAZU), as did most of the institutes that comprise the academy's Research Centre today. With the Research Centre's founding in 1981 and its rapid development in the following years, the conditions were in place for the then Institute for Emigration Studies at SAZU, established just four years earlier, to be the last of SAZU's institutes to join what is now an internationally renowned research organization. Although the history of today's Slovenian Migration Institute (SMI) extends somewhat farther back—to the 1960s—the year 1986 represents the most important turning point in its development.

THE PREDECESSOR: THE STUDY CENTER FOR THE HISTORY OF SLOVENIAN EMIGRATION, 1963–1970

On June 18, 1963, in cooperation with the history section of the Slovene Emigrant Association, SAZU founded the Study Center for the History of Slovenian Emigration. The very next year, the Boris Kidrič Fund began financing a project called the *Zgodovina slovenskega izseljenstva* (History of Slovenian Emigration), led by the Study Center. For the first four years, the center operated through three sections—archival, bibliographic, and statistical—while functioning as an initiating committee for the collection, publication, and scholarly interpretation of materials related to Slovenian emigration. Geographers, historians, sociologists, and scholars from other fields at various institutions—the National and University Library (NUK), the Institute of the Socialist Republic of Slovenia for Statistics, the state archives, and

¹ PhD in literary studies; retired research advisor at the Research Centre of the Slovenian Academy of Sciences and Arts, Slovenian Migration Institute; janja.serafin@gmail.com

so on—joined the working groups; Fran Zwitter, a member of SAZU, chaired the center's Scientific Council. The center operated relatively effectively this way without premises or staff of its own. Subsequent presentations of the results included an exhibition of emigrant press and photographs documenting aid provided by emigrants to their homeland during World War II; the opening of the Louis Adamič memorial room in the house where he was born; the preparation of a comprehensive, widely applicable statistical report on emigration from the Slovenian ethnic territory from the mid-nineteenth century to World War I;¹ and the publication of Jože Bajc's bibliographies of Slovenian emigrant periodicals published through 1945. Only from 1968 to 1970 did the Study Center employ a staff researcher in history; after which its activity waned. A final unsuccessful attempt to revive its work took place in 1973 (Čebulj-Sajko, 1990, pp. 11–14).

THE INSTITUTE FOR EMIGRATION STUDIES AT SAZU (1982–1986)

In September 1981, an international symposium took place in Ljubljana to mark the thirtieth anniversary of the death of the renowned American writer of Slovenian origin Louis Adamič. Ivo Fabinc, then rector of the University of Edvard Kardelj in Ljubljana (today's University of Ljubljana), emphasized in his opening address that Adamič was "the first scholar to study the history of Slovenian emigration and himself a prominent representative of it" (Fabinc, 1981, p. 5). The discussion among the participants brought forth an initiative to establish an institute whose interdisciplinary research on Slovenian emigration would go beyond the earlier collection of materials and the publication of more or less factual accounts. The institute's program was also to include the further scholarly examination of Adamič's life, his literary work, social role, and international significance (Žitnik Serafin, 2017, pp. 22–23).

This time, the initiative bore fruit. The Institute for Emigration Studies at the Slovenian Academy of Sciences and Arts was founded in 1982, a year after the symposium participants proposed it, with the aim of designing and implementing a multidisciplinary research program in this field. The institute was headed by Janez Stanonik, a member of SAZU, who at the time held the title of director and had also organized the symposium on Louis Adamič. As in the case of the preceding Study Center, Fran Zwitter was entrusted with chairing the institute's Scientific Council. The institute acquired most of its emigrant-related archival and newspaper collections during the four years before it joined ZRC SAZU. Upon its establishment, the institute was given its own premises at Novi trg 3. In 1983, it officially became the central documentation center in Slovenia for the collection of archival material on Slovenian emigrants

1 It was a typed manuscript from 1965 with the title "Statistical Data on Emigration from the Slovenian Territory Between the Mid-Nineteenth Century to World War I." The author of the report was Živko Šifrer, the head of the statistical section of the then Study Center. The report is held by the Slovenian Migration Institute, ZRC SAZU.

(Žitnik Serafin, 2002, p. 228). In addition to the documentation specialist employed on a contract-basis, Mila Šenk, a former associate of the Slovene Emigrant Association, the institute's three-member working group consisted of sociologist Silva Mežnarič (employed from 1984 to 1986) and me, then a junior researcher, with the primary task of studying the genesis of Adamič's final book *The Eagle and the Roots*, with a longer-term responsibility for research on the literary and cultural activities of Slovenian emigrants.

The documentation specialist organized the institute's archival holdings and its collection of Slovenian emigrant periodicals, continually adding new acquisitions to both. At two scholarly meetings that the institute organized in 1985 with researchers studying Slovenian emigration at other institutions, the participants entrusted the institute with coordinating research in the field. The broad international network of the institute's founder and head, Janez Stanonik, brought new external connections to the "Noni Institute," as Stanonik's colleagues in Slovenia and abroad informally called it. Given the wealth of material already collected, the holdings and collections identified outside the institute, and the wide dispersal of researchers interested in emigration materials, the new institute needed to hire additional researchers from various humanities and social-science disciplines. Under SAZU's funding system at the time, however, such hiring was not feasible (Čebulj-Sajko, 1990, pp. 14–17; Žitnik Serafin, 1996, pp. 265–266).

THE INSTITUTE FOR SLOVENIAN EMIGRATION STUDIES, ZRC SAZU (1986–2009)

On November 3, 1986, the Institute for Emigration Studies at SAZU became part of ZRC SAZU, thereby gaining much better opportunities for the planned expansion of its multidisciplinary staff. It was renamed the Institute for Slovenian Emigration Studies, ZRC SAZU. Stanonik, who carried out the transition of the research unit together with the ZRC SAZU leadership, could not continue to head the institute directly due to the employment requirements then applicable to ZRC SAZU institute heads. However, until his death, he remained a member of the institute's Scientific Council and continued to contribute to the direction of its work (Žitnik Serafin, 2017, pp. 23–24). After 1986, the institute was led by Andrej Vovko (1987–1991), Janja Žitnik Serafin (1992–1994), Irena Gantar Godina (1994–1999), and Marina Lukšič Hacin (since 1999).

After the departure of the documentation specialist and the sociologist in 1986, I was the institute's only remaining staff member. Soon after it joined ZRC SAZU, the institute entered a period of rapid staff expansion. By 1990, when the institute began publishing the journal *Dve domovini: razprave o izseljenstvu* / *Two Homelands: Migration Studies*, the principal Slovenian scholarly journal in the field of international migration, it had hired four additional researchers—two historians and two junior

researchers (an ethnologist in 1987 and a sociologist in 1989)—and a professional staff member. This ambitious publishing project attests to the exceptional creative drive of our five-member research team at the time, which was still small and inexperienced and had no established researchers: the first historian and I, the institute's first junior researcher, received our PhDs in 1992; the second historian followed in 1993, and the two later junior researchers received theirs in 1995 and 1998, respectively. By the end of the 1990s, the institute had also hired another historian and two junior researchers, one specializing in journalism and political science and the other in geography and cultural anthropology. Over the following decade, the institute's staff composition changed several times—two researchers left ZRC SAZU, while new hires expanded the institute's range of academic disciplines to include art history, social work, and other areas. In 2001, alongside its by-then relatively well-established scholarly journal, the institute began to publish the monograph series *Migracije (Migrations)*, to which it added the subseries *Migrantke (Migrant Women)* in 2009. In 2006, the institute handed over its archival collections to the Archives of the Republic of Slovenia.

In the decade 1992–2002, with the indispensable help of professional associate Špela Marinšek, the still relatively small research group (6–8 researchers) organized six multi-day international conferences on the topics of emigration, seasonal labor migration, and cultural and artistic activities in the diasporas.² In 1999, given the scale of its earlier basic research projects carried out from 1993 to 1998, the institute acquired funding for the research program National and Cultural Identity of Slovenian Emigration, which has now run continuously for 28 years (under an expanded title since 2013).

In 2002, when Slovenia conducted its last traditional census, and the country witnessed a renewed rise in xenophobic sentiment among Slovenia's national majority, the institute gradually began to expand its research interests to include issues related to the position of immigrants from other parts of the former Yugoslavia and their descendants in Slovenia.³ The peak of Slovenians' resistance to immigrants from the former fraternal republics was clearly evident in reactions to the Constitutional Court's 1999 ruling that the deletion of citizens of the other republics from Slovenia's register of permanent residents had been unlawful, and even more so in 2004 as a result of the referendum on a "technical law" for the regulation of the rights of the Erased. With a voter turnout of 31 percent, nearly 95 percent of those voting rejected the law.

The institute's researchers became involved in raising awareness among Slovenia's majority population about all forms of human-rights violations and discrimination against the largest ethnic groups of immigrants to this country. In

2 The conferences took place in Ljubljana (1992), Portorož (1995, 1998, and 1999), Gozd Martuljek (2001), and Radenci (2002).

3 At the time, the topic was addressed mainly by a few researchers at Ljubljana's Institute for Ethnic Studies and Peace Institute – Institute for Contemporary Social and Political Studies.

our discussions, we began to introduce mirror comparisons between the situation of former Slovenian refugees and emigrants, on the one hand, and that of earlier and more recent immigrants to Slovenia, on the other. In doing so, we sought to highlight as vividly as possible the double standards that often mislead people into believing that everything that is “ours” is incomparable to everything else. With the presentation of the report “Lively Visions, Ossified Realities: Co-Cultures in Slovenia” at the annual conference of the Association of European Migration Institutions (AEMI) at Universidade Aberta, Portugal’s Open University, in Lisbon in September 2003 and at the invitation of the organizer’s to represent Slovenia at the conference A Common European Migration Policy: A Common Policy for Different Problems (Leuven, Belgium) in November 2003. The institute once again drew international attention and took another step toward going beyond its role as the central institute for the study of Slovenian emigration by positioning itself as an authoritative and independent participant in international discussions on the challenges of contemporary migration.

In the period 2004–2007, the institute carried out the first basic research project on the situation of immigrants in Slovenia and on their literary production and cultural activities. A year after the completion of this project, a geographer, ethnologist, and cultural anthropologist employed at the institute successfully defended his doctoral dissertation on a topic that included certain aspects of these issues. From Silva Mežnarič’s departure in 1986 until the beginning of this century, pressing questions concerning the problematic attitude of the Slovenian national majority toward certain immigrant communities, their linguistic rights, religious traditions, and cultural values remained marginalized within the institute’s research. The institute began considering a broader scope of its research program and, consequently, a corresponding broadening of its name.

THE SLOVENIAN MIGRATION INSTITUTE, ZRC SAZU (2009–PRESENT)

The proposal to amend the name of the institute was officially approved in 2009; the scope of the research program had already been gradually broadened before then. From the beginning of project-based funding for research work in Slovenia in 1993 to 2009, over those sixteen years, the research group, which during this period brought together 4–12 researchers, completed 31 national and international research projects, including targeted and applied projects. Most concerned Slovenian emigration, although they increasingly addressed the migrations of other populations as well. Over the following 17 years, nearly 30 SMI researchers—the current research group together with 10 former staff members employed temporarily during this period⁴—

4 Because of the large number of temporary appointments (project-based employment), this period was marked by higher staff turnover at the institute.

have completed 70 different national, cross-border, bilateral, interregional, and broader international research and applied projects.

The content of these already completed studies ranges from topics in the field of historical and contemporary Slovenian migrations (such as the surveillance of Slovenian emigrants between the two world wars, Slovenian communities in the United States, “brain drain,” descendants of Slovenian emigrants in Bosnia and Herzegovina, Slovenian and Croatian communities in the diaspora, past and present migrations between Slovenia and Austria, contemporary strategies of Slovenian emigrants for the preservation of ethnic identity...) to migration, mobility, and integration in the broadest sense (for example, the posting of workers within the EU and from third countries, the empowerment of migrants and the translation of cultural language to facilitate migrants’ integration, adult education for refugees, the integration of refugees into the labor market, etc.). Educational projects, however, have stood out in terms of scale and direct social impact. Members of the research group, together with Slovenian and international partners, have developed innovative educational strategies “to strengthen the political participation and active citizenship of immigrants and ethnic minorities and to promote active citizenship” (Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, n.d.). They have promoted intercultural values as the foundations for forming and developing relationships in a multiethnic and multilingual society. They have created didactic and informative materials, manuals, publications, games, and so on, to promote diversity and intercultural understanding in school and university settings. They have also distributed these materials to young people and teaching staff at all education levels, as demonstrated in the projects Intercultural Relations, Step in!, and EDUKA – Educating for Diversity (Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, n.d.-a; n.d.-b; Medkulturni odnosi, 2011). As part of the project Only (with) Others Are We (2016–2021), aimed at strengthening the social and civic competencies of professionals, which the Slovenian Migration Institute carried out with the Educational Research Institute and participating organizations, more than 10,200 educational professionals and administrators in Slovenian kindergartens, primary and secondary schools, and adult education centers participated in five 16-hour seminars (Vižintin, 2022; Le z drugimi smo, 2021, p. 2).

Currently, the institute has 19 full-time employees. Most are established researchers, who closely involve junior researchers, research assistants, and professional staff members in implementing their projects and programs. The institute successfully continues to publish the bilingual scholarly journal *Dve domovini / Two Homelands*, and every researcher has an opportunity to acquire editorial knowledge and skills. The journal’s first editors-in-chief were Andrej Vovko (1990–1992), Marjan Drnovšek (1993–1995), Janja Žitnik Serafin (1996–2000) and again Marjan Drnovšek (2001–2007). The editorship then alternated among co-editors Jure Gombač, Jernej Mlekuž, and Kristina Toplak (2008–2015). They were followed by Mirjam Milharčič Hladnik (2015–2023) and co-editors Kristina Toplak and Marijanca Ajša Vižintin (since 2024).

At the end of 1999, the journal was included in the first four international databases for citation and indexing. To this day, it has established itself as an influential and relatively frequently cited scholarly journal. In recent years, contributions by foreign authors have been predominant.

SMI continues to publish the equally prominent monograph series *Migracije* and its *Migrantke* subseries, which, thanks to the dedicated work of its earlier and later editors—Janja Žitnik Serafin (2001–2008), Jernej Mlekuž (2008–2014), Aleksej Kalc (2014–2019), and since then Jernej Mlekuž—has fulfilled its stated goals for a quarter of a century. So far, 33 scholarly monographs have been published in the series. The pace of their publication has changed significantly over time: the publication rate from the first eight years (an average of two volumes per year, a total of 16 volumes through 2008) halved in the following 18 years (an average of one volume per year, a total of 17 monographs). This is probably due to shifts in the balance of the combined national and European research co-funding system, which at certain times provides greater support for basic research and scholarly publications and at others creates more opportunities for applied projects and professional publications.

Most of the current researchers are involved in the research program National and Cultural Identity of Slovenian Emigration in the Context of Migration Studies, which—as already mentioned—has been running continuously since 1999. Two researchers are participating in the research program Heritage on the Margins: New Perspectives on Heritage and Identity within and beyond the National. In addition, the institute implements nine (national, bilateral, and European) research and applied projects, of which up to a third are historical research projects. These include the study of the history of migration in Southeastern and Central Europe, the history of emigration policies in Slovenia and Croatia, and the state and diaspora in the first and second Yugoslavia. The remaining six ongoing projects address the cross-border mobility practices of workers between Slovenia and other EU countries, contemporary challenges related to migrant employment and social inclusion—particularly in the workplace—measures to improve migrants' housing conditions in Europe and other current aspects of migrant social inclusion, including vocational training and support in starting businesses.

SMI researchers continue to expand their network of research and teaching collaborations with Slovenian and international universities and research institutes, international scholarly associations, often also with primary and secondary schools, non-governmental organizations, asylum centers, various local and state administrative bodies, and emigrant and immigrant cultural organizations, associations, and institutions, etc. As in the past, they regularly organize international academic conferences and professional meetings and contribute to the exchange of research findings by regularly attending important scholarly meetings abroad. Where possible, in the preparation and implementation of their projects, events, exhibitions, trainings, and so on, they involve Slovenian emigrants and their descendants, as well as immigrants and refugees in Slovenia as equal participants. They

participate in the preparation of legislative proposals, educational programs, and co-funding programs for cultural and other activities of Slovenian emigrants and immigrants to Slovenia. They present their research findings to the professional public in monographs and articles published by leading European and other international publishers, in renowned international journals in the field of migration and integration strategies (*Journal of Ethnic and Migration Studies*, *Central and Eastern European Migration Review*, *European Journal of Inclusive Education*, *Journal of Migration History*, *Dve domovini / Two Homelands*, etc.) and in the main periodicals of their core academic disciplines. They communicate their findings to professional and general audiences through manuals, popular-science presentations in public media, and appearances on radio and television programs.

The medium-term SMI Strategic Plan for 2021–2026 clearly summarizes the institute's main long-term goals:

From a narrow focus on Slovenian emigration in the past, the research has now expanded to include immigration, integration, multiculturalism, and other migration-related phenomena. [...] From the very beginning, the institute was conceived as multidisciplinary and continues to operate on this basis, which we further develop through interdisciplinary studies of migratory phenomena. [...] In our work, we have always kept pace with conceptual and methodological changes and new approaches in migration studies in the international arena. For decades, research approaches have been based on the understanding of migration as one of the constitutive social phenomena that characterize societal, social, cultural, economic, and other developments at local, regional, national, and global levels. To transfer our knowledge to various stakeholder groups, several of our researchers have been involved in the educational process for decades in formal and informal educational environments, in which we strive to achieve a better understanding of today's migration phenomena and contribute to raising awareness in the wider social environment. [...] Through our comprehensive approach, we will continue to act as a scholarly and social institution whose specific expertise enables us to engage responsibly with the developments shaping an increasingly mobile and globally interconnected world. (Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, 2021, p. 4)

Until recently, the SMI research group's body of research lacked comprehensive overview studies and broad syntheses of research on Slovenian emigration. In the last few years, this debt has been nearly settled with the publication of two survey monographs that seek, from different perspectives, to provide as comprehensive an account as possible of the economic, social, and cultural history of Slovenian emigration from the mid-nineteenth century to the establishment of the Slovenian state in 1991. These are *Doba velikih migracij na Slovenskem* (Kalc et al., 2020) and *Slovenske selitve v socializmu* (Lukšič Hacin, 2024). The former was reprinted two years ago when its English translation *Daring Dreams of the Future: Slovenian Mass Migrations*

1870–1945 (Kalc et al., 2024) was simultaneously published by Peter Lang; it covers the period up to the end of World War II, while the latter summarizes the results of research on voluntary and forced migration in Slovenia and on the organizational structures of the Slovenian diaspora around the world in the period 1945–1991.

As I concluded on another occasion, “without an understanding of the past experiences of Slovenian emigrants and refugees, the Slovenian public probably finds it difficult to comprehend the position of people involved in today’s migratory movements toward and into Europe” (Žitnik Serafin, 2017, p. 32). The remaining debt is the planned trilogy’s third volume—an interdisciplinary overview of Slovenian migration in the period since Slovenia gained independence. This will fully meet the fundamental prerequisite for relevant comparative research and, above all, for an even more effective transmission of past experiences and knowledge about Slovenian emigration to present generations, who are repeatedly confronted with situations comparable to those of the past (Žitnik Serafin, 2017, p. 32). Publishing a comprehensive overview of Slovenian emigration has been one of the main missions of the institute since joining ZRC SAZU.

Today, the Slovenian Migration Institute, ZRC SAZU, is recognized by the Slovenian general public and the international scholarly community as a respected research institution and an operationally effective social actor. Drawing on its thorough knowledge and understanding of the past and present, and informed by the latest conceptual and methodological developments in the international humanities and social sciences, it actively engages with current issues and thereby influences both the present and, indirectly, the future. Thus, it remains an important contributor to public awareness. Our time is filled with manufactured fear, hatred, and indifference. History teaches us that those who learn anything useful for humanity from it are generally those who have too little influence in the here and now. However, this must not deter us from constantly recognizing, highlighting, and taking account of fundamental social patterns that have recurred over the centuries. Without this continuing effort, the last faint ray that illuminates our turbulent present in a more realistic light would be extinguished.

REFERENCES

- Čebulj-Sajko, B. (1990). Preteklo in sedanje delovanje Inštituta za slovensko izseljenstvo. *Dve domovini / Two Homelands*, 1, 11–20. <https://ojs.zrc-sazu.si/twohomelands/article/view/13069>
- Fabinc, I. (1981). Otvoritveni govor dr. Iva Fabince, rektorja Univerze Edvarda Kardelja v Ljubljani. In J. Stanonik (Ed.), *Louis Adamič: Simpozij: Symposium* (pp. 3–5). Univerza Edvarda Kardelja v Ljubljani.
- Inštitut za slovensko izseljenstvo in migracije ZRC SAZU. (2021). *Strateški načrt Inštituta za slovensko izseljenstvo in migracije ZRC SAZU, 2021–2026*. <https://isim.zrc-sazu.si/sites/default/files/Strategija%20ISIM.pdf>
- Inštitut za slovensko izseljenstvo in migracije ZRC SAZU. (n.d.-a). *EDUKA – Educating for diversity*. <https://isim.zrc-sazu.si/en/strani/eduka-educating-for-diversity>
- Inštitut za slovensko izseljenstvo in migracije ZRC SAZU. (n.d.-b). *Step in!* <https://isim.zrc-sazu.si/en/strani/step-in>
- Kalc, A., Milharčič Hladnik, M., & Žitnik Serafin, J. (2020). *Doba velikih migracij na Slovenskem*. Založba ZRC. <https://doi.org/10.3986/9789610502630>
- Kalc, A., Milharčič Hladnik, M., & Žitnik Serafin, J. (2024). *Daring dreams of the future: Slovenian mass migrations 1870–1945*. Peter Lang.
- Le z drugimi smo. (2021). *Zaključno poročilo 2016–2021*. <https://lezdrugimismo.si/uploads/files/Zaključno%20poročilo.pdf>
- Lukšič Hacin, M. (Ed.). (2024). *Slovenske selitve v socializmu*. Založba ZRC. <https://doi.org/10.3986/9789610509103>
- Medkulturni odnosi. (2011). <http://www.medkulturni-odnosi.si>
- Vižintin, M. A. (2022). Uvod: Le z drugimi smo: Migracije in izobraževanje. *Dve domovini / Two Homelands*, 56, 127–130. <https://doi.org/10.3986/dd.2022.2.09>
- Žitnik Serafin, J. (1996). Desetletnica delovanja Inštituta za slovensko izseljenstvo ZRC SAZU. *Dve domovini / Two Homelands*, 7, 265–267. <https://www.dlib.si/details/URN:NBN:SI:doc-1RJU0GD9>
- Žitnik Serafin, J. (2002). Dvajset let Inštituta za slovensko izseljenstvo. *Dve domovini / Two Homelands*, 16, 227–233. <https://www.dlib.si/details/URN:NBN:SI:doc-1IB9P2TO>
- Žitnik Serafin, J. (2017). Razvoj Inštituta za slovensko izseljenstvo in migracije ZRC SAZU in njegov prispevek k izseljenskim študijam. In J. Žitnik Serafin & A. Kalc (Eds.), *Raziskovanje slovenskega izseljenstva: vidiki, pristopi, vsebine* (pp. 21–34). Založba ZRC. <https://doi.org/10.3986/9789610500414>

MED ODGOVORNOSTJO IN SOLIDARNOSTJO: NOVI SOLIDARNOSTNI MEHANIZEM EU IN NJEGOVE MEJE PRI PRERAZPOREJANJU BREMEN

Urh Šelih¹

COBISS 1.01

IZVLEČEK

Med odgovornostjo in solidarnostjo: novi solidarnostni mehanizem EU in njegove meje pri prerazporejanju bremen

Avtor v prispevku analizira, ali novi pakt o migracijah in azilu zlasti prek uredbe o upravljanju azila in migracij (angl. *Asylum and Migration Management Regulation* – AMMR) omogoča učinkovitejšo uresničitev načela solidarnosti iz 80. člena Pogodbe o delovanju Evropske unije. Osredotoča se na novi solidarnostni mehanizem, zlasti letni solidarnostni fond, oblike solidarnostnih prispevkov in postopek premestitve, ter opozarja na njihove normativne in praktične pomanjkljivosti. Čeprav ureditev pomeni pomemben premik od *ad hoc* rešitev, avtor ugotavlja, da ohranitev dublinske logike, široka diskrecija držav članic ter omejen institucionalni nadzor zmanjšujejo možnosti za resnično pravično delitev odgovornosti v praksi.

KLJUČNE BESEDE: solidarnost, azilna politika EU, AMMR, dublinski sistem, pakt o migracijah in azilu

ABSTRACT

Between Responsibility and Solidarity: The EU's New Solidarity Mechanism and Its Limits in Redistributing Burdens

The article examines whether the new EU Pact on Migration and Asylum, particularly through the Asylum and Migration Management Regulation (AMMR), enables the practical realization of the principle of solidarity enshrined in Article 80 TFEU. It analyzes the design of the Annual Solidarity Pool, relocation procedures, and alternative solidarity measures, highlighting both their potential and structural shortcomings. While the mechanism represents a step toward a more systematic approach to solidarity, its flexibility, continued reliance on Dublin criteria, and the weak monitoring framework raise doubts about its capacity to effectively rebalance responsibilities and protect asylum seekers' rights in practice.

KEYWORDS: solidarity, EU asylum policy, AMMR, Dublin system, Pact on Migration and Asylum

¹ mag. prava; Univerza v Ljubljani, Pravna fakulteta, Katedra za ustavno pravo; urh.selih@pf.uni-lj.si; ORCID <https://orcid.org/0009-0000-6473-3308>

UVOD

Pravo Evropske unije temelji na izhodišču, da države članice pri skupnih izzivih ne delujejo vsaka zase, temveč sodelujejo in si medsebojno pomagajo. Na področju migracij in azila je to posebej jasno izraženo v 80. členu Pogodbe o delovanju Evropske unije (PDEU), ki zahteva, da so skupne politike azila, priseljavanja in nadzora zunanjih meja urejene po načelu solidarnosti in pravične delitve odgovornosti med državami članicami. V idealnem primeru to pomeni, da bi se ob izrednih ali dolgotrajnih pritiskih breme razporedilo tako, da nobena država ne bi ostala sama in da bi skupni sistem ostal stabilen tudi v obdobjih povečanih migracijskih tokov.

Praksa pa je bistveno bolj konfliktna. Države na zunanji meji Unije, zlasti Italija, Grčija in Španija, že vrsto let opozarjajo, da zaradi svoje geografske lege nosijo nesorazmeren del odgovornosti, ker predstavljajo prvo vstopno točko v EU. Ob tem se del drugih držav članic, predvsem iz srednje- in vzhodnoevropskega prostora, vztrajno upira obveznostim, ki bi vključevale sprejem prosilcev za azil. V tem se kaže temeljno nasprotje: solidarnost je zapisana in politično pogosto poudarjana, vendar se njena vsebina v praksi uresničuje neenakomerno, kar postavlja vprašanje, ali gre za zavezujoče načelo, ki mora imeti konkretne pravne posledice, ali za politično načelo, ki ga države v ključnih trenutkih lahko relativizirajo.

V tem okviru je EU leta 2024 sprejela nov zakonodajni sveženj, t. i. pakt o migracijah in azilu, ki naj bi to dilemo naslovil z novim solidarnostnim mehanizmom. Namesto enoznačno obveznih premestitev uvaja koncept »fleksibilne solidarnosti«, kjer lahko države prispevajo na različne načine: s premestitvami, s finančnimi prispevki ali z alternativnimi ukrepi (npr. operativno in tehnično pomočjo, osebjem, opremo). S tem naj bi se povečala politična izvedljivost sistema in zmanjšalo tveganje, da posamezne države sodelovanje v celoti blokirajo.

Osrednje raziskovalno vprašanje tega prispevka je, ali novi mehanizem solidarnosti po uredbi o upravljanju azila in migracij pomeni dejanski prehod od politično pogojene k pravno operacionalizirani solidarnosti. Pri tem izhajam iz teze, da temeljna težava evropske azilne politike ni zgolj pomanjkanje solidarnosti, temveč selektivna, krizna in politično pogojena uporaba tega načela. Prav zato analiza ne more ostati omejena na normativni opis mehanizma, temveč mora upoštevati tudi širšo prakso EU v primerljivih situacijah. Posebej pomembna je primerjava med odzivom Unije na begunske prihode v obdobju 2015–2016 ter odzivom na razselitev iz Ukrajine po letu 2022. Medtem ko je bil leta 2015 poskus obvezne premestitve prosilcev za azil predmet ostrega političnega in sodnega odpora, je leta 2022 Svet prvič aktiviral režim začasne zaščite za razseljene osebe iz Ukrajine, s čimer je bil dostop do zaščite organiziran bistveno hitreje in z manj konflikta med državami članicami. Ta razlika odpira širše vprašanje, ali je solidarnost v pravu EU res nevtrarno operativno načelo ali pa se v praksi uresničuje selektivno, odvisno od politične sprejemljivosti posamezne skupine beguncev, ter ali je mogoče zaradi pakta glede tega pričakovati spremembe. V nadaljevanju zato naprej predstavim normativni okvir

načela solidarnosti in mehanizme, ki jih uvaja pakt, nato pa analiziram, v kolikšni meri je glede na izkušnje iz begunske krize ter ukrajinske razselitve sploh mogoče pričakovati, da bo novi sistem v praksi odpravil strukturno neenako porazdelitev odgovornosti med državami članicami.

Ta prispevek lahko obravnava le del razsežnih in medsebojno prepletenih reform, ki jih uvaja novi pakt o migracijah in azilu. Obsežnost sprememb ter njihova kompleksna institucionalna arhitektura presegata okvire enega besedila, zato se pričujoča analiza osredotoča predvsem na nekatere ključne elemente solidarnostnega mehanizma, ki se zdijo posebej pomembni za razumevanje prihodnjega delovanja sistema. Nadaljnje raziskovanje bo nujno, saj se bo dejanski vpliv sprejetih določb pokazal šele z njihovim izvajanjem v praksi, ko bo mogoče celovito oceniti, ali bodo novi mehanizmi res dosegli svoj namen ali pa bodo morda odprli nova pravna in politična vprašanja.

OZADJE PROBLEMATIKE

Odprava nadzora na notranjih mejah Evropske unije je odprla pot k postopnemu oblikovanju skupnih politik na področju varovanja zunanjih meja, azila in migracij. Integracijski proces na teh področjih pa je dosegel svoje meje leta 2015, ko je množičen prihod beguncev in drugih migrantov razkril številne strukturne slabosti evropskega azilnega sistema (Del Monte & Orav, 2024, str. 2). Čeprav so mediji in javni diskurz takrat pogosto govorili o izrednih razmerah »begunske krize« ter o neobvladljivem pritisku, ki so ga na nacionalne migracijske sisteme vršile vrtoglave številke prihajajočih beguncev, je jedro krize pravzaprav predstavljal popoln neuspeh skupnega evropskega azilnega sistema (Tubakovic, 2017, str. 2) s tako imenovanimi dublinskimi pravili na čelu, po katerih je za reševanje prošenj za mednarodno zaščito običajno odgovorna prva država vstopa begunca (Garcés-Mascareñas, 2015, str. 1). Evropska unija se je na krizo sicer odzvala s sprejetjem vrste zakonodajnih in političnih ukrepov, kljub temu pa je kriza izpostavila osrednjo težavo, ki je ostala nerešena: na ravni EU ni vzpostavljenega učinkovitega in pravičnega sistema solidarnosti ter delitve odgovornosti med državami članicami (Del Monte & Orav, 2024, str. 2).

Ob tem pa je treba navedeni problem nekoliko natančneje opredeliti. Leta 2015 težava ni bila zgolj v tem, da je na zunanje meje prišlo veliko ljudi, niti zgolj v tem, da druge države članice niso bile pripravljene prevzeti določenega bremena, čeprav sta bila to poglobljena dejavnika. Kriza je razkrila tudi omejenost same normativne zasnove sistema, ki je temeljila na predpostavki, da bodo prosilci za azil ostali v državi, ki jo pravo določa kot odgovorno za obravnavo njihove prošnje. Ta predpostavka v praksi ni zdržala. Številni prosilci, zlasti tisti, ki so v Evropo prišli po vzhodnosredozemski in osrednjesredozemski poti, niso želeli ostati v državah prvega vstopa, temveč so si prizadevali doseči države, v katerih so že imeli družinske, jezikovne, socialne ali skupnostne vezi oziroma kjer so zaznavali boljše možnosti za vključitev

in dolgoročno življenje (Bozorgmehr et al., 2016). V tem smislu kriza ni pokazala le pomanjkanja meddržavne solidarnosti, temveč tudi neskladje med formalnimi pravili odgovornosti in dejansko logiko gibanja ljudi znotraj območja brez notranjih meja.

Zasnova skupnega evropskega azilnega sistema je sicer že od začetka spodbujala neenako in nepošteno delitev odgovornosti med državami članicami. Ustvarjalci azilne politike EU so namreč precej naivno pričakovali, da bo uskladitev standardov po celotni EU izenačila razmere v državah članicah in tako odpravila sekundarna gibanja beguncev. Ta poenostavljena domneva pa ni upoštevala razlik v obremenitvah držav, ki izhajajo iz njihove geografske lege in bližine migracijskih tokov (Farcy et al., 2016). Hkrati pa ni ustrezno upoštevala niti tega, da so sekundarna gibanja v veliki meri posledica ne le razlik v sprejemnih pogojih in azilnih praksah, temveč tudi same racionalnosti prosilcev, ki skušajo zaščito poiskati tam, kjer vidijo več možnosti za dejansko varnost, socialno oporo in prihodnost (Trilling, 2015, str. 9–12). Zaradi tega se je dublinski sistem v praksi izkazal za posebej nestabilnega prav v situaciji množičnejših prihodov: ne le zato, ker je nesorazmerno obremenjeval države na obrobju Unije, temveč tudi zato, ker je vztrajal pri razporeditvi odgovornosti, ki ni sledila dejanski logiki gibanja prosilcev za azil. Razlike v nacionalnih sprejemnih pogojih so spodbujale sekundarna gibanja, medtem ko je bila odgovornost sistemsko še naprej koncentrirana na države prvega vstopa (Brekke & Brochmann, 2015, str. 1–4). V razmerah v obdobju 2015–2016 so se zato države na zunanji meji znašle v položaju, ko so bodisi skušale preprečevati vstop bodisi dopuščale nadaljnje gibanje proti severu in zahodu Evrope, kar je razkrilo tako strukturno obremenitev periferije kot tudi omejitve dublinskega sistema kot mehanizma pravične delitve odgovornosti (Loxa & Stoyanova, 2022, str. 143–145). Svet je sicer leta 2015 sprejel dva zavezujoča sklepa, s katerima je vzpostavil začasni izjemni mehanizem za prerazporeditev 160.000 prosilcev, ki so se nahajali v Grčiji in Italiji in so očitno potrebovali mednarodno zaščito, a so že zgodnja poročila pokazala omejeno pripravljenost držav za dejansko izvajanje sprejetih zavez (Evropska komisija, 2016).

Reforma Skupnega evropskega azilnega sistema, ki je bila po večletnih pogajanjih dokončno sprejeta leta 2024, potrjuje dolgo prisotno soglasje držav članic, da prejšnji sistem ni zagotavljal ne učinkovitosti ne pravične porazdelitve odgovornosti. Temu je izrecno pritrdila Evropska komisija v obrazložitvi predloga nove uredbe o upravljanju azila in migracij z dne 23. 9. 2020, ko je navedla, da »trenutno pravzaprav ni ne učinkovitega solidarnostnega mehanizma ne uspešnih pravil glede odgovornosti« (Evropska komisija, 2020a).

Sprejeti zakonodajni sveženj pakta o azilu in migracijah zato poskuša odgovoriti prav na vprašanje, kako v praksi uresničiti načelo solidarnosti, kot ga določajo primarni akti EU in ga pretvoriti v delujoče operative mehanizme delitve bremen. Ena ključnih dilem v procesu oblikovanja reforme skupnega azilnega sistema je bila prav odločitev, ali naj bo solidarnostni mehanizem obvezen, trajen in sistemski ali pa fleksibilen ter situacijsko prilagodljiv. Končna rešitev nekako združuje elemente obojega: uvaja obvezno, a prilagodljivo solidarnost, ki državam članicam omogoča

izbiro med različnimi oblikami pomoči, hkrati pa postavlja dodatne obveznosti v primeru povečanega pritiska na zunanjih mejah (De Bruycker, 2024a). Sprejetje reforme tako predstavlja poskus nadomestitve dosedanjega razkoraka med načelom solidarnosti na normativni ravni in njegovim pomanjkljivim uresničevanjem v praksi, zasledovala pa naj bi tudi humani pristop k migracijam in azilu ter krepitev zaupanja med državami članicami z odpravljanjem obstoječe vrzeli pri izvajanju prava EU (Evropska komisija, 2020b, str. 2–3). Toda prav izkušnja leta 2015 opozarja, da uspešnost takšne reforme ne bo odvisna le od tega, ali bo sistem omogočal več meddržavne pomoči, temveč tudi od tega, ali bo sposoben preseči temeljno napetost med formalnimi pravili odgovornosti, interesi držav članic in dejanskimi življenjskimi strategijami ljudi, ki zaščito v Evropi iščejo.

NAČELO SOLIDARNOSTI PO PRAVU EU

Solidarnost med državami članicami Evropske unije ni pomembna samo v današnjem kontekstu, kjer jo lahko razumemo kot ključno za doseganje skupnih ciljev zaradi njene inherentne povezave z vladavino prava in z zahtevo, da se skupne politike izvajajo predvidljivo, na podlagi pravil in ne zgolj političnih rezultatov (Saracino, 2024, str. 1106). Solidarnost je bila osrednji koncept nastajanja Evropske skupnosti in evropskega povezovanja že od samega začetka (Vignon, 2011, str. 1). Robert Schuman, eden izmed »ustanovnih očetov« evropskega projekta, je že leta 1950 poudaril, da »Evrope ne bo mogoče oblikovati naenkrat ali po enem samem načrtu. Zgrajena bo s konkretnimi dosežki; šele ti bodo privedli do dejanske solidarnosti.«

Solidarnost je pomembno oblikovala Evropsko unijo na več področjih: Sodišče Evropske unije je denimo že leta 1973¹ razložilo, da solidarnost pomeni obveznost vseh držav članic, da izvajajo skupno dogovorjena pravila, neizpolnjevanje dolžnosti solidarnosti pa posega v same temelje pravnega reda Skupnosti; solidarnost je krepila oblikovanje skupne energetske politike predvsem v povezavi z naftno krizo leta 1973 (Bartenstein, 2021, str. 3); zaznamovala je reševanje Krize Evra (Vignon, 2011, str. 4); dandanes pa se predvsem omenja v povezavi z reševanjem drugih kriznih situacij, kot v času pandemije bolezni covid-19 (primeroma Ocak & Erhan, 2021) in begunske krize iz leta 2015/2016 (prim. Tsourdi, 2020).

Kljub očitni pomembnosti in temeljnemu značaju solidarnosti pa se ta redko znajde v akademskih razpravah, ki bi sistematično obravnavale njene konceptualne temelje. V evropski politiki se pogosto uporablja predvsem kot nejasna politična ali pravna norma (Bartenstein, 2021, str. 1), ki v pravnih aktih Unije ni jasno in določno definirana (Saracino, 2024, str. 1093).

1 Sodba sodišča Evropske unije z dne 7. februarja 1973, v zadevi Komisije Evropske skupnosti proti Italiji, 39–72, tč. 24.

Solidarnost v EU se konceptualno pravno razume predvsem skozi njeno povezavo s pojmom evropskega skupnega dobrega. Tako kot je skupno dobro držav članic opredeljeno v njihovih ustavah, je tudi skupno dobro Unije zasidrano v primarnem pravu, zlasti v ciljih Unije, ki jih določa člen 3 Pogodbe o Evropski uniji (v nadaljevanju: PEU), umeščenih v okvir vrednot in načel iz člena 2 PEU (Saracino, 2024, str. 1106). Posamezna področja delovanja EU te cilje dodatno konkretizirajo, kar nekateri avtorji označujejo kot *raison d'être* Evropske unije (Sangiovanni, 2013). Iz sklepnih predlogov generalne pravobranilke Sharpston (2019, točka 249) pa izhaja, da je solidarnost umeščena v samo jedro ustroja Unije, ne nujno kot izrecno naštetá vrednota, temveč kot funkcionalno vodilo njenega delovanja, ki zahteva pravično porazdelitev bremen.

Čeprav solidarnost torej ni izrecno naštetá kot skupna vrednota, je v drugem odstavku člena 2 PEU vseeno opredeljena kot načelo, ki izhaja iz skupnih značilnosti držav članic in predstavlja temelj njihovega medsebojnega razmerja. Pravna logika evropskega reda tako solidarnost umešča v kategorijo temeljnih načel,² ki omogočajo uresničevanje skupnih vrednot, kar potrjuje tudi člen 3 PEU, saj izrecno določa, da Unija spodbuja solidarnost med državami članicami (Saracino, 2024, str. 1107). Načelo solidarnosti zavezuje tako države članice, da sprejemajo vse ukrepe, ki so potrebni za učinkovito izvajanje prava EU, kot tudi institucije EU, ne samo pri političnem usklajevanju, ampak tudi pri oblikovanju, izvajanju in uporabi prava Unije.³

Dodatno pravno oporo temu načelu najdemo v členu 4(3) PEU, ki v okviru načela lojalnega sodelovanja določa, da se Unija in države članice »medsebojno spoštujejo in (...) pomagajo pri izpolnjevanju nalog« ter da morajo države članice sprejeti »vse splošne in posebne ukrepe, potrebne za zagotovitev izpolnjevanja obveznosti«, ki izhajajo iz prava EU. Ta določba dodatno potrjuje, da je solidarnost strukturni element pravnega razmerja med Unijo in državami članicami. V skladu s tem morajo države članice sodelovati in prispevati k uresničevanju ciljev, sprejemati vse ukrepe za učinkovito izvrševanje prava EU in ko je to potrebno, zagotavljati pomoč in podporo druga drugim. Institucije EU pa morajo pri tem sodelovati z državami članicami.⁴ Načelo solidarnosti lahko torej zahteva dolžno ravnanje ali pa lahko zahteva, da se države vzdržijo ravnanja, ki ne bi bilo združljivo s konceptom solidarnosti (Saracino, 2024, str. 1108).

Ker se koncept solidarnosti v praksi najmočneje odraža prav na področju azilnih, migracijskih in mejnih politik, je ključnega pomena razumeti normativno izhodišče primarnega prava EU, specifično na tem področju.

2 Tako tudi Sodišče Evropske unije v zadevi Poljske proti Evropski komisiji (T-883/16) z dne 10. septembra 2019.

3 Glej npr. Sodišče Evropske unije v zadevi Nemčije proti Poljski (C-848/19 P) z dne 15. julija 2021, tč. 41, 49 in 53.

4 Tako tudi Sodišče Evropske unije v zadevi Nemčije proti Poljski (C-848/19 P) z dne 15. julija 2021, tč. 37 in 53.

Solidarnost je bila uvrščena na področje upravljanja migracij ravno zaradi potrebe po pravični delitvi odgovornosti, zaščiti bolj obremenjenih držav in boljše obravnave migracijskih pritiskov med državami članicami (Evropski parlament, 2011). Presenetljivo pa PEU nikjer izrecno ne opredeli same »solidarnosti«. Kljub temu pa primarno pravo solidarnost na področju azila, priseljevanja in nadzora zunanjih meja jasno postavlja kot vodilno načelo na teh področjih, kar je razvidno zlasti iz členov 67(2) in 80 Pogodbe o delovanju Evropske unije (v nadaljevanju: PDEU).

Člen 67(2) PDEU, tako določa, da »Unija (...) oblikuje skupno politiko o azilu, priseljevanju in nadzoru zunanjih meja na podlagi solidarnosti med državami članicami, ki je pravična do državljanov tretjih držav.« Iz tega se da razbrati, da solidarnost ne velja samo v izrednih razmerah, temveč naj bi predstavljala temeljni okvir vsakršnega delovanja na teh področjih. Člen 80 PDEU pa dodatno določa, da je treba, kadar je to potrebno zaradi uresničitve načela solidarnosti in pravične delitve odgovornosti, sprejeti ustrezne ukrepe, ki se raztezajo tudi na finančno področje (Del Monte & Orav, 2024, str. 5). Kljub tej relativno jasni programski usmeritvi pa se hitro pokaže osrednja pravna dilema in kompleksnost: določba člena 80 namreč ne opredeli natančneje, kateri konkretni ukrepi naj bi pomenili uresničevanje solidarnosti. Posledično je premalo določna, da bi državam nalagala točno določene obveznosti, hkrati pa ima dovolj vsebinske teže, da je ne moremo obravnavati kot deklarativno ali prazno določbo in je preprosto spregledati (Farcy et al., 2016). Nekateri sicer poudarjajo, da člen 80 PDEU vendarle predstavlja pravno podlago za podporne ukrepe, kot so izmenjava informacij, tehnična pomoč ali usposabljanja (Geiger et al., 2015, str. 437), drugi pa kot izraz solidarnosti omenjajo premestitve beguncev in operativno podporo (Santos Vara, 2022, str. 3).

Solidarnost v evropskem azilnem sistemu tako po stališču Gerbauda (2025, str. 38–40) opravlja več funkcij. Prvič, ima preventivno vlogo, saj naj bi z vzpostavitvijo objektivnega sodelovalnega okvira, utelešenega v Skupnem evropskem azilnem sistemu, preprečevala nastanek večjih neravnovesij med državami članicami in zagotavljala enakomernejšo porazdelitev obremenitev. Drugič, solidarnost ima tudi uravnoteževalno funkcijo, ki se aktivira takrat, ko kljub obstoječim mehanizmom nesorazmerja med državami članicami vztrajajo ali znova nastajajo. V takih primerih mora Unija v skladu s členom 80 PDEU sprejeti ukrepe, ki ponovno vzpostavljajo ravnotežje, bodisi prek začasne zaščite, operativne podpore agencij EU ali finančnih instrumentov. Tretjič, solidarnost lahko nastopa v nujnih okoliščinah, ko države članice zaradi nenadnih migracijskih pritiskov doživijo preobremenitev svojih azilnih sistemov (v zvezi s tem glej tudi: Marin et al., 2020). Na podlagi člena 78(3) PDEU lahko EU v takih razmerah sprejme začasne ukrepe za podporo posamezni državi, pri čemer je ta oblika solidarnosti po letu 2015 močno zaznamovala evropsko razpravo o migracijah.

Vendar pa se ob tem postavlja vprašanje, ali solidarnost v praksi sploh izpolnjuje navedene funkcije oziroma komu je pravzaprav namenjena. Besedilo člena 80 solidarnost omejuje izključno na odnose med državami članicami, zato je težko

zagovarjati širšo, zunanjo razsežnost solidarnosti do tretjih držav ali posameznikov. Obseg solidarnosti med samimi članicami pa, kot omenjeno, prav tako ni jasno opredeljen. Posledično je solidarnost v Skupnem evropskem azilnem sistemu razumljena predvsem kot mehanizem med državami, ne pa kot mehanizem zaščite prosilcev za azil (Farcy et al., 2016).

To vodi številne avtorje (npr. Di Nunzio, 2023; Mitsilegas, 2014; Carrera & Guild, 2015; Aleinikoff & Owen, 2022) k pozivu po spremembi navedene paradigme: od horizontalne solidarnosti med državami k navpični solidarnosti, usmerjeni v posameznike, ki potrebujejo zaščito. Učinkovit azilni sistem bi moral pri premestitvah med državami članicami upoštevati tudi preference prosilcev, sicer sistem ostaja prisilen in slabo delujoč. V območju brez notranjih meja bi morali imeti begunci možnost svobodnega gibanja ob ohranitvi svojih pravic, kar pa bi zahtevalo precej bolj poenoten azilni sistem, kot ga poznamo danes. Pomanjkanje jasnih normativnih obveznosti solidarnosti ter hkrati pomanjkanje dejanske (fizične) solidarnosti med državami članicami sta prispevala k nastanku in poglobljanju azilne krize EU, ki je sčasoma prerasla tudi v krizo upravljanja (Farcy et al., 2016).

SELEKTIVNA SOLIDARNOST: PRIMERJAVA MED LETOMA 2015/2016 IN ODZIVOM NA RAZSELITEV IZ UKRAJINE

Primerjava med odzivom EU na prihode beguncev v letih 2015–2016 in odzivom na razselitev iz Ukrajine po februarju 2022 pokaže, da se solidarnost v evropskem azilnem prostoru ne uresničuje enotno, temveč izrazito selektivno. Leta 2015 je Unija, kot omenjeno, skušala pritisk na Italijo in Grčijo ublažiti z izrednima relokacijskima sklepoma, vendar je bil ta mehanizem od začetka zaznamovan z ostrim odporom več držav članic, nizko stopnjo dejanskega izvajanja in poznejšimi sodnimi spori.⁵ Nasprotno pa je Svet 4. marca 2022 po ruskem napadu na Ukrajino prvič aktiviral Direktivo o začasni zaščiti (Svet Evropske unije, 2022), s čimer je razseljenim osebam iz Ukrajine omogočil takojšen dostop do prebivanja, trga dela, izobraževanja in osnovne socialne zaščite brez predhodnega individualnega azilnega postopka. Že ta razlika kaže, da EU v praksi lažje mobilizira zaščitne in solidarne mehanizme tedaj, ko med državami članicami obstaja zadostna politična in družbena sprejemljivost glede skupine, ki zaščito potrebuje (Pepinsky et al., 2024, str. 990–991).

Ta primerjava je za obravnavo načela solidarnosti posebej pomembna iz dveh razlogov. Prvič, razkriva, da solidarnost v EU na področju azila in migracij ni zgolj pravno vprašanje razdelitve odgovornosti med državami članicami, temveč tudi vprašanje politične konstrukcije »upravičenega« begunca. Del sodobne literature zato opozarja, da so bili ukrajinski begunci v evropskem političnem in medijskem

5 Glej npr. Sodišče Evropske unije v zadevi Slovaške in Madžarske proti Svetu Evropske unije (C-643/15 in C-647/15) z dne 6 septembra 2017 in v zadevi Komisije proti Republiki Poljski in ostalim (C-715/17, C-718/17, C-719/17) z dne 2 aprila 2020.

prostoru pogosto predstavljeni kot kulturno bližji, bolj »evropski« in zato bolj vredni zaščite, medtem ko so bili prosilci iz Sirije, Iraka ali Afganistana v obdobju 2015–2016 pogostejše obravnavani skozi varnostno in krizno optiko (npr. Diab, 2025; Giancaspro & Lucenti, 2024; Ramji-Nogales, 2022). Drugič, ta razlika kaže, da je sposobnost Unije za hitro in velikopotezno ukrepanje dejansko že obstajala, vendar ni bila uporabljena enako za vse skupine razseljenih oseb (Churruca Muguruza, 2022). To problematizira razumevanje člena 80 PDEU kot nevtralnega načela, saj če se solidarnost aktivira intenzivneje pri politično sprejemljivejših skupinah, potem ne deluje kot splošno pravno načelo, ampak kot diferenciran in selektiven instrument upravljanja migracij.

S tega vidika novi pakt o azilu in migracijah ni mogoče presojati zgolj po tem, ali uvaja več instrumentov delitve bremen, temveč tudi po tem, ali zmanjšuje ali pa utrjuje selektivnost evropske solidarnosti. Če mehanizem ostaja vezan predvsem na zmanjševanje iregularnih prihodov, na upravljanje pritiskov in na diskrecijsko izbiro med različnimi vrstami prispevkov, obstaja resna nevarnost, da bo tudi v prihodnje bolj odziven na politične prioritete držav članic kot na enotno in pravno dosledno razumevanje zaščite.

SOLIDARNOST PO PAKTU

14. maja 2024 je bila v okviru pakta sprejeta uredba o upravljanju azila in migracij (AMMR), ki bo nekoliko predručala mehanizem solidarnosti na ravni EU. Preden začnem obravnavati konkretne zakonodajne rešitve, ki izhajajo iz uredbe, se mi zdi smiselno pojasniti vizijo in razloge na strani EU, ki jih lahko razberemo iz obrazložitve predloga navedene uredbe (Evropska komisija, 2020, str. 2–6). Evropska komisija v obrazložitvi predloga izhaja iz ocene, da obstoječi evropski azilni sistem ne zagotavlja ustreznega upravljanja migracijskih pritiskov ter ne omogoča učinkovite delitve odgovornosti med državami članicami. Predlog poudarja, da trenutni mehanizmi ne preprečujejo nepooblaščenih premikov in da nesorazmerno obremenjujejo države prvega prihoda.

V ospredju uredbe naj bi bil »celovit pristop«, ki povezuje azil, vračanje, zunanje meje, boj proti tihotapljenju in sodelovanje s tretjimi državami, pri čemer solidarnost in pravična delitev odgovornosti nista več zamišljeni le kot odziv na azilne postopke, temveč kot vodilo celotnega upravljanja migracij. Osrednji element predloga je vzpostavitev novega mehanizma solidarnosti, ki naj bi bil stalne, prilagodljive in odzivne narave. Predlog predvideva, da bi države članice lahko izbirale med različnimi oblikami prispevkov, kot so premestitve prosilcev za zaščito, finančni prispevki in druge oblike pomoči. Takšen model naj bi omogočil, da se obremenitve v času migracijskega pritiska ali tveganja pritiska razporedijo med države članice na bolj strukturiran in pravičen način.

Predlog tako trdi, da naj bi vzpostavitev novega solidarnostnega okvira in prenovljenih pravil o odgovornosti omogočila bolj uravnoteženo delitev obveznosti ter

učinkovitejše delovanje evropskega azilnega sistema, vendar njihova dejanska učinkovitost pri prerazporejanju bremen in izvedljivost ostajata predmet presoje.

Da bi razumeli, kako naj bi uredba uresničila zastavljeno načelo solidarnosti, v nadaljevanju analiziram nov sistem solidarnosti, ki ga uredba postavlja v središče reforme.

UKREPI SOLIDARNOSTNEGA MEHANIZMA

Osrednji instrument solidarnosti po novi ureditvi predstavlja »letni solidarnostni fond«, ki je v skladu z 12. členom uredbe namenjen uravnoteženemu in učinkovitemu reševanju migracijskih razmer, ki izhajajo iz letnih solidarnostnih potreb držav članic, temelji pa na prispevkih med državami članicami. Fond sestavljajo tri oblike prispevkov: premestitve, finančni prispevki in alternativni solidarnostni ukrepi (člen 56(2)).

Premestitve oziroma fizična solidarnost, kot jih naslavlja De Bruycker (2024b, str. 16), pomenijo prenos oseb med državami članicami. Ker gre za edino obliko solidarnosti, ki neposredno prerazporedi odgovornost za osebo, premestitve v praksi pogosto postanejo merilo, po katerem se ocenjuje »resnična« solidarnost. Praviloma se premešča prosilce za azil, lahko pa tudi osebe, ki so že pridobile mednarodno zaščito. Država, ki sprejema osebe, lahko določi prednostne (zaželenne) profile, medtem ko država upravičenka izbere osebe za premestitev, pri čemer te nimajo pravice izbrati ciljne države. V tem kontekstu Karageorgiou (2020, str. 6) opozarja, da takšna ureditev prosilce za azil obravnava kot pasivne objekte upravljanja, katerih razporeditev med državami članicami poteka brez upoštevanja njihovih lastnih preferenc in osebnih okoliščin.

Finančni prispevki, ki jih opredeljuje člen 56(2)(b), predstavljajo obliko solidarnosti v obliki finančnih transferjev, katerih namen je financiranje podpornih ukrepov v drugih državah članicah. Sredstva se lahko uporabijo za migracije, sprejem, azil, reintegracijo pred vrnitvijo, upravljanje meja in projekte v tretjih državah, pri čemer država upravičenka sama določi, katere dejavnosti bo financirala (ECRE, 2024, str. 57).

Alternativni solidarnostni ukrepi kot tretja oblika solidarnosti pa skladno s členom 56(2)(c) obsegajo nefinančne prispevke, kot so operativna pomoč, krepitev zmogljivosti, storitve, kadrovska podpora, infrastruktura in tehnična oprema. Ti prispevki se obravnavajo kot finančna solidarnost, pri čemer se njihova vrednost določi sporazumno med državo, ki pomoč nudi, in državo, ki jo prejme. Takšni ukrepi se izvajajo na zahtevo države upravičenke, neizkoriščeni prispevki pa se ob koncu leta pretvorijo v denarne prispevke (De Bruycker, 2024b, str. 16). ECRE (2024, str. 59) opozarja, da imajo v praksi alternativni solidarnostni ukrepi lahko tako pozitivne kot negativne učinke. Po eni strani lahko hitro zagotovijo nujne zmogljivosti, denimo dodatno nastanitveno infrastrukturo ali operativno podporo pri iskanju in reševanju na morju. Po drugi strani pa obstaja nevarnost, da se bodo prispevki pretežno

usmerjali v nadzor meja ter opremo in tehnologije za preprečevanje nedovoljenih prehodov, kar lahko poveča odvračilne učinke na meji in zmanjša število prosilcev za azil, ki dosežejo ciljne države članice, kar pa ni v skladu s standardi mednarodnega prava.

OPERACIONALIZACIJA SOLIDARNOSTI

Potem ko sem predstavil posamezne vrste solidarnostnih ukrepov, se sedaj osredotočam na institucionalni in postopkovni okvir, v katerem se ti ukrepi dejansko uresničujejo. Letni solidarnostni fond, ki je torej *conditio sine qua non* novega solidarnostnega mehanizma, se sprejema v okviru letnega cikla upravljanja migracij. Glavni namen cikla je zagotoviti nadzor nad aktivacijo in operacionalizacijo solidarnostnega mehanizma ter letno spremljanje splošnih razmer na področju azila in migracij (ECRE, 2024, str. 8). Sestavljen je iz več zaporednih faz, od katerih prva pripada Komisiji, ki mora do 15. oktobra vsakega leta sprejeti tri temeljne akte (Maiani, 2024):

Letno poročilo (člena 9 in 10), v katerem predstavi razmere in dogajanje preteklih 12 mesecev na področju azila, sprejema in migracij. Sem sodijo predvsem podatki o številu prošenj, dodeljenih statusih, sprejemnih zmogljivosti držav članic, nezakonitih prehodov meje ipd. Zanimivo je, da mora poročilo vsebovati tudi projekcije in predvidevanja razmer za prihodnje leto (De Bruycker, 2024b, str. 11–12). Poročilo temelji na informacijah in statistikah, ki jih predložijo države članice ter pristojne agencije (npr. Europol in Agencija za azil), pri čemer iz besedila uredbe ne izhaja, da bi morala komisija pri svojih ocenah upoštevati geografsko lego članic.

Sklep (člen 11), ki opredeli katere izmed držav članic so »pod migracijskim pritiskom«, ali jim tak pritisk grozi v prihodnjem letu oziroma ali se soočajo z »resnimi migracijskimi razmerami«. Pojem migracijskega pritiska je v 24. točki 1. člena uredbe opredeljen kot stanje, v katerem je število prihodov ali prošenj takšno, da ustvarja nesorazmerne obveznosti za državo članico zaradi česar je nujno takojšnje ukrepanje. »Resne migracijske razmere« pa po 25. točki člena 1 nastopijo, kadar sedanje in pretekle letne številke prihodov tudi dobro pripravljen azilni sistem potisnejo do meja njegovih zmogljivosti. Ta sklep je ključen, saj so prav te države kasneje upravičene do črpanja prispevkov iz solidarnostnega fonda oziroma so lahko oproščene prispevanja vanj. Ta postopek Komisiji že na prvi pogled pušča široko diskrecijo, saj ne temelji na izračunu skupnega števila prihodov na ravni Unije, hkrati pa ji omogoča, da na podlagi relativno nedoločno opredeljenih pojmov ugotavlja, katere države članice se štejejo za tiste pod migracijskim pritiskom (ECRE, 2024, str. 8). Kljub temu vzpostavlja bolj objektivno podlago kot v preteklosti, saj naj bi v večji meri odražal dejansko breme, s katerim se soočajo države članice. Prav ta element je pred uveljavitvijo uredbe manjkal, kar je državam omogočalo, da se razglašajo za preobremenjene brez nepristranskih in zanesljivih meril (De Bruycker, 2024b, str. 14).

Sledi predlog sklepa Svetu o vzpostavitvi letnega solidarnostnega fonda (člen 12), ki ga komisija pripravi na podlagi letnega poročila. V solidarnostnem fondu določi skupno število potrebnih letnih premestitev ter obseg finančnih prispevkov. Ti morajo na ravni Unije skupaj predstavljati vsaj 30.000 premestitev oz. 600.000.000 EUR finančnih prispevkov (pri čemer je odstopanje možno le v izrednih razmerah). Komisija lahko predlaga tudi višje ali nižje številke, vendar mora pri tem ohraniti razmerje ene premestitve na 20.000 EUR, saj naj bi to zagotavljalo enakovrednost različnih vrst solidarnostnih ukrepov. Poleg tega lahko predlog vključuje tudi druge (alternativne) oblike solidarnosti, kot je operativna podpora iz člena 56(2)(c) (ki sicer ni podrobneje opredeljena), kadrovske podpore, krepitev zmogljivosti itd., kadar to narekujejo potrebe posameznih držav članic. V okviru predloga komisija določi tudi okvirne deleže posameznih držav članic, izračunane na podlagi njihovega prebivalstva in BDP, ki služijo kot orientacija pri kasnejšem postopku zavez držav (Maiani, 2024). Glede na podatke iz leta 2023 bi pravičen delež Slovenije po teh merilih znašal okvirno 127 premestitev oziroma 2,5 milijona finančnih sredstev (ECRE, 2024, str. 68).

Naslednji korak, ki predstavlja osrednji del postopka zajema t. i. »Solidarnostni forum EU na visoki ravni« (člena 13 in 57(3) uredbe), ki ga sestavljajo predstavniki držav članic. Forum preuči dokumente komisije in sprejme sklep o skupnem številu posameznih solidarnostnih ukrepov na podlagi njenega predloga. Države članice nato podajo svoje zaveze k plačevanju prispevkov za oblikovanje letnega solidarnostnega fonda, ki pa morajo upoštevati višino obveznega »pravičnega deleža« (Maiani, 2024).

Na podlagi ugotovitev foruma Svet do konca koledarskega leta sprejme sklep o vzpostavitvi letnega solidarnostnega načrta, ki mora biti skladen z zavezami, sprejetimi v okviru foruma (člen 57(1) uredbe). Forum tako sicer formalno nastopa kot pripravljalno telo za sprejem izvedbenega akta Sveta, vendar njegova vloga daleč presega tehnično pripravo, saj ima izrazito politično razsežnost in dejansko bistveno vpliva na vsebino končne odločitve (De Bruycker, 2024b, str. 19). Čeprav naj bi sklep formalno temeljil tudi na predlogu Komisije, lahko Svet, v nasprotju s splošnim pravilom iz člena 293 PDEU, od njega odstopi s kvalificirano večino, kar ni presenetljivo glede na politično občutljivost tematike. Predlog Komisije glede solidarnostnih ukrepov prav tako ni zavezujoč za forum, ki ga mora zgolj preučiti in sklep sprejeti na njegovi podlagi (Maiani, 2024), hkrati pa komisija ohranja izključno pristojnost za ugotavljanje, katere države članice so pod migracijskim pritiskom.

Maiani (2024) opozarja na nekatera pomembna vprašanja v zvezi s tem korakom oblikovanja solidarnostnega mehanizma. Čeprav formalna pristojnost za sprejem odločitve glede solidarnostnega načrta pripada Svetu, bo v praksi torej kolektiv držav članic tisti, ki bo določal splošno raven solidarnosti. Prav tako ni jasno, ali mora forum do svoje odločitve priti soglasno ali z neko večino. De Bruycker (2024a) pa še izpostavlja, da ostaja nejasno tudi to, za katere konkretne vrste ukrepov bodo lahko države članice dejansko uporabile prispevke iz solidarnostnega fonda. Na podlagi člena 56(3) uredbe bi bilo namreč mogoče sklepati, da se sredstva lahko namenijo

tudi za krepitev zunanjih meja (kot sem omenil že zgoraj), kar odpira resna vprašanja glede skladnosti s dosedanja prakso Komisije, ki je bila izrecno zadržana do financiranja gradnje fizičnih ovir, kot so ograje ali zidovi, z evropskimi sredstvi.⁶ ECRE v svojih komentarjih podobno opozarja, da obstaja nevarnost, da bodo alternativni ukrepi v praksi preusmerjeni predvsem v krepitev mejnega nadzora, pri čemer bodo zanemarjeni vidiki, ki neposredno krepijo sisteme zaščite. Takšna usmeritev bi lahko vodila v solidarnost, ki predvsem zmanjšuje število oseb, ki dosežejo ciljne države članice, namesto da bi okrepila njihove azilne in sprejemne zmogljivosti (ECRE, 2024, str. 59).

Uredba poleg foruma na visoki ravni predvideva vzpostavitev še enega telesa, Tehničnega foruma EU za solidarnost (člen 14 in 15), ki ga sestavljajo predstavniki držav članic na ravni višjih uradnikov, vodi pa ga koordinator za solidarnost. Njegova vloga je zagotoviti izvajanje solidarnostnega mehanizma v praksi in njegovo operativno usklajevanje (ECRE, 2024, str. 16). Čeprav gre formalno za tehnično telo, ima pomembno vsebinsko funkcijo, saj povezuje zaveze držav članic, ki prispevajo, s konkretnimi potrebami držav upravičenk ter skrbi za usklajeno in uravnoteženo razporeditev razpoložljivih solidarnostnih prispevkov (De Bruycker, 2024b, str. 19).

Kot zadnjo izmed številnih novosti velja podrobneje predstaviti še sam postopek premestitev, ki sem ga v prejšnjem delu že deloma obravnaval, a si zaradi njegove osrednje vloge v solidarnostnem mehanizmu zasluži samostojno predstavitev.

Čeprav mehanizem premestitev v okviru nove uredbe ni popolna novost, mu pakt daje precej bolj sistematično in trajnejšo vlogo. Kot sem omenil, je EU že leta 2015 v odzivu na begunsko krizo posegla po instrumentu premestitev kot izrednemu ukrepu za razbremenitev posebej obremenjenih držav članic, s čimer je skušala solidarnost med državami članicami izraziti v konkretni operativni obliki.⁷

Na tem konceptualnem okviru, ki se je nekoliko razvijal v letih 2015–2017 temelji tudi današnji mehanizem premestitev v uredbi, vendar z vrsto bistvenih postopkovnih in strukturnih sprememb, ki naj bi zagotovile bolj predvidljivo, bolj zavezujočo in sistemsko umeščeno obliko solidarnosti med državami članicami. Uredba določa, da se lahko premesti prosilce za mednarodno zaščito ne glede na njihovo državljanstvo, pa tudi (kot že omenjeno) osebe, ki že imajo mednarodno zaščito, če jim je bil status priznan pred kratkim in če se s premestitvijo soglašata obe državi in upravičenec zaščite. Iz člena 16(4) uredbe lahko razberemo, da so iz postopka premestitev izključene osebe, ki predstavljajo varnostno grožnjo (člen 16(4)). To pomeni, da lahko država, ki naj bi osebo sprejela, premestitev zavrne samo iz tega razloga, drugih pravnih podlag za zavrnitev pa nima. Poleg tega se iz postopka izključijo tudi tisti prosilci, za katere je država upravičenka odgovorna zaradi družinskih vezi (člen 67(5)). S tem naj bi se zagotovilo, da se družine ne bi po nepotrebnem razdruževale

⁶ Glej npr. Boffey, 2021.

⁷ V zvezi s tem gl. tiskovno sporočilo Evropske komisije z dne 16. marca 2016 (Evropska komisija, 2016).

in da premestitve ne bi posegale v načelo ohranjanja družinske enotnosti, ki ga omenja uvodna izjava 70 uredbe (Maiani, 2024).

Država, ki prejema pomoč (torej prosilce odpošilja), mora najprej sama izbrati osebe, primerne za premestitev, nato pa jih s pomočjo Agencije EU za azil poveže z državo, ki jih bo sprejela. Upravičene osebe pri tem nimajo veliko pravic – lahko le sporočijo, ali imajo v kateri od držav članic pomembne osebne ali družinske vezi ter zahtevajo, da ostanejo skupaj s svojimi družinskimi člani, če se ti prav tako premeščajo (člen 67(3), (4) in (6)). Ena od največjih težav sistema je, da tem osebam ne omogoča izbire države, kamor bodo premeščene. Čeprav bi možnost izbire bistveno poenostavila postopek in zmanjšala kasnejše selitve v druge države članice, je zakonodajalec ohranil strogo ureditev, po kateri se ljudje premestijo tja, kjer je na voljo prostor, ne pa tja, kjer bi morda lažje začeli novo življenje (Maiani, 2024). To je potencialno lahko problematično tudi zaradi različnih sprejemnih pogojev v državah, integracije in individualnih potreb prosilcev – težava, s katero se sooča tudi trenutni Dublinski sistem (gl. npr. Gotsova, 2019, str. 643).

Po premestitvi osebe, ki jim je že priznan status mednarodne zaščite, v novi državi samodejno obdržijo enak status. Veliko bolj zapleten pa je položaj prosilcev za azil, torej oseb, ki so še v postopku pridobitve statusa. Če je država, iz katere je oseba premeščena, že opravila celoten dublinski postopek in ugotovila, da je sama odgovorna za obravnavo prošnje (iz razlogov, ki niso povezani z družinskimi), potem to odgovornost po premestitvi prevzame nova država. Če pa ta postopka ni opravila v celoti in je zgolj preverila, da družinska merila ne veljajo, mora celoten dublinski postopek po premestitvi opraviti država, ki osebo prejme (člena 67 in 68 uredbe). To pomeni, da lahko prosilec preden sploh dostopa do vsebinskega azilnega postopka, doživi še eno, dodatno premestitev v tretjo državo članico. Takšna ureditev pokaže, da zakonodaja pogosto podcenjuje zahtevnost premestitev in položaj prosilcev. Čeprav je cilj zagotoviti spoštovanje družinske enotnosti v osnovi plemenit, je izvedba nedosledna in pomanjkljiva. Ponovni prenos se lahko namreč odredi tudi na podlagi meril, ki nimajo nobene povezave z družinskimi vezmi, kar lahko dodatno zaplete že tako negotov položaj prosilcev (npr. člena 31 in 32) (Maiani, 2024).

MEJE IN POMANJKLJIVOSTI SOLIDARNOSTNEGA MEHANIZMA

Na prvi pogled solidarnostni mehanizem uredbe izpolnjuje pogoje za uresničevanje načela solidarnosti. Vzpostavlja namreč sistem, do katerega lahko države članice dostopajo, kadar se soočajo z dejanskimi potrebami, hkrati pa vse države članice zavezuje k sodelovanju pri delitvi bremen. Kljub temu pa mehanizem ob podrobni analizi kaže številne pomanjkljivosti v svoji zasnovi, strukturi in načinu izvajanja, kar omejuje njegovo zmožnost, da bi učinkovito uresničeval načelo solidarnosti iz člena 80 PDEU ter hkrati zagotavljal ustrezno varstvo temeljnih pravic prosilcev za azil (Gerbaudo, 2025, str. 150). V nadaljevanju se zato posvečam nekaterim osrednjim

kritikam in pomanjkljivostim tega mehanizma, pri čemer bom analizo mestoma podkrepil tudi s stališči in argumenti izbrane strokovne literature.

Temeljna značilnost uredbe je torej prenos operativne vsebine solidarnosti v letni upravljavski cikel, ki Komisiji in Svetu omogoča, da vsako leto določita tako države, upravičene do pomoči, kot tudi vrste in obseg solidarnostnih ukrepov. Menim pa, da takšna ureditev solidarnosti ne strukturira kot stabilne in pravno določljive obveznosti držav članic, temveč jo preoblikuje v prilagodljiv politični instrument, odvisen od trenutnih političnih razmerij in prioritet. Države, ki se soočajo z večjim migracijskim pritiskom, tako nimajo na voljo izrecne pravice do pomoči v pravnem smislu, temveč so odvisne od letnih odločitev Unije, kar problematizira samo bistvo solidarnosti kot načela, ki bi moralo delovati avtomatično in ne diskrecijsko. ECRE zato opozarja, da je na splošno malo verjetno, da bo solidarnostni mehanizem predstavljal pravično utež povečanemu bremenu držav na zunanji meja (ECRE, 2024, str. 76).

Kot sem omenil že zgoraj, sta finančna solidarnost in nabor alternativnih solidarnostnih ukrepov lahko dobrodošli dopolnitvi premestitev, saj v praksi pogosto predstavljata bolj izvedljivo in politično sprejemljivejšo obliko solidarnosti. Takšni instrumenti lahko državam upravičenkam (vsaj v teoriji) omogočijo razmeroma hitro izboljšanje sprejemnih pogojev, dostopa do pravne pomoči ali celo povečanje zmogljivosti za izvajanje dejavnosti iskanja in reševanja na morju. Vendar, kot opozarja tudi Gerbaudo (2025, str. 45), finančna solidarnost kljub svoji razširjeni uporabi ni brez pomembnih pomanjkljivosti: učinki financiranja se praviloma ne pokažejo takoj, njihovo izvajanje je, zlasti na nacionalni ravni, pogosto obremenjeno z birokratskimi zapleti, hkrati pa je težko oblikovati pravičen in učinkovit ključ za razdelitev sredstev. Poleg tega se zdi, da se pri finančnih in alternativnih ukrepih odpirajo izrazito problematična vprašanja vsebinske usmerjenosti. Prispevajoče države lahko namreč sredstva usmerjajo predvsem v krepitev nadzora meja, infrastrukture ali tehnične opreme, ob manjšem poudarku na ukrepih, ki dejansko izboljšujejo dostop do pravic ali zaščito oseb na mejah. Takšna praksa tvega, da se solidarnost preoblikuje v instrument upravljanja migracij in odvrčanja, namesto da bi blažila strukturne pomanjkljivosti azilnih sistemov najbolj obremenjenih držav članic, kar glede na osrednji cilj pakta, tj. zmanjševanje iregularnih migracij, pravzaprav niti ni presenetljivo.

Posebej problematična je široka diskrecijska pravica Komisije pri ugotavljanju, katere države so pod »migracijskim pritiskom« oziroma v »resnih migracijskih razmerah«. Čeprav uredba predvideva uporabo statističnih podatkov in objektivnih meril, so ta zastavljena izrazito odprto in omogočajo različno interpretacijo istih okoliščin. Pojmi, kot so »nesorazmerne obveznosti«, ali »resnost razmer«, niso normativno natančno opredeljeni, s čimer se krepi tveganje arbitrarnega oziroma izključno političnega odločanja. Takšna normativna odprtost zmanjšuje predvidljivost pravnega položaja držav članic in oslabi pravno varnost beguncev, obenem pa pomeni pomemben prenos kvazizakonodajnih pristojnosti na izvršilni organ Unije.

Nadalje je sporna tudi domnevna enakovrednost med različnimi oblikami solidarnosti, zlasti razmerje med premestitvami in finančnimi prispevki, izraženo v razmerju ena oseba = 20.000 evrov. Uredba ne navaja nobene jasne metodologije, na kateri bi ta znesek temeljil, prav tako ni izkazano, ali takšna finančna protivrednost resnično krije dejanske stroške obravnave prošnje za azil in integracije prosilcev. To velja še toliko bolj ob upoštevanju dejstva, da ima posamezna država članica v skladu s členom 56(2) »popolno diskrecijo« med oblikami solidarnostnih ukrepov (Maiani, 2024). Takšna ureditev dolgoročno utrjuje strukturne neenakosti med državami članicami, saj finančno močnejšim omogoča, da se razbremenjujejo prevzemanja odgovornosti za obravnavo prošenj za mednarodno zaščito, ne da bi se s tem učinkovito naslovila temeljni problem preobremenjenosti geografsko izpostavljenih držav. Čeprav pomanjkanje finančnih sredstev vsekakor predstavlja pomemben dejavnik, pa izkušnje begunske krize 2015–2016 kažejo, da fiskalne omejitve same po sebi niso bile odločilni razlog za odpoved delovanja azilnih sistemov. Bistveno večjo vlogo so imele strukturne pomanjkljivosti, kot so nezadostne administrativne zmogljivosti, pomanjkanje usposobljenega kadra, neučinkoviti postopki ter šibka koordinacija na ravni Unije (Beirens, 2018, str. 2–3 in 21). Finančna solidarnost zato sama po sebi ne more nadomestiti nujnosti systemske krepitve institucionalnih kapacitet držav, ki nosijo nesorazmerni del bremena izvajanja skupnega azilnega sistema. V nasprotju s pogostimi kritikami, ki fleksibilnost solidarnostnega mehanizma torej razumejo kot dejavnik njegovih pomanjkljivosti, De Bruycker (2024b, str. 16) poudarja, da prav ta značilnost predstavlja njegovo ključno prednost, saj lahko omogoči sodelovanje tistih držav članic, ki sicer ne bi bile pripravljene sodelovati v sistemu premestitev. Podobno ugotavlja tudi Grelsson (2025, str. 34–36), ki v svoji analizi politične dinamike pogajanj opozarja, da je bila visoka stopnja fleksibilnosti mehanizma nujen kompromis za doseg soglasja med državami članicami z različnimi stališči. Po njegovem je prav možnost izbiranja med različnimi vrstami prispevkov, ob hkratni ohranitvi znatne diskrecije držav, eden ključnih razlogov, da je bil solidarnostni mehanizem sploh sprejet. V tem smislu fleksibilnost ni zgolj tehnična lastnost, temveč izraz politične realnosti, v kateri je bilo mogoče preseči dolgotrajno blokado reform azilnega sistema.

Solidarnostni fond je zasnovan kot korektiv običajnih pravil o dodeljevanju odgovornosti za prosilce. S tem se ne posega v togost dublinskih pravil, ki jih uredba v glavnem prevzema, temveč ohranja logiko solidarnega ukrepanja, ki temelji predvsem na izrednih razmerah Gerbaudo (2025, str. 151). Namesto tega, da bi se člen 80 PDEU uresničeval kot strukturno orodje za preprečevanje neenakomerne porazdelitve bremen med državami članicami, uredba ostaja zasidrana v kriznem razumevanju solidarnosti, ki je zaznamovala tudi neučinkovit odziv Unije na migracijsko krizo iz leta 2015. Skupni evropski azilni sistem pa pahnila na rob kolapsa (Tsourdi, 2017, str. 673–674). S tem pa obstaja tudi verjetnost, da nov sistem ne bo bistveno zmanjšal sekundarnih tokov.

Pomemben vidik učinkovitega delovanja solidarnostnega mehanizma, na katerega opozarja De Bruycker (2024a), ki ga uredba sicer predvideva, vendar ga ne razvije v zadostni meri, je vprašanje institucionalnega nadzora nad izvajanjem mehanizma. Uredba sicer določa vlogo Komisije, Agencije EU za azil ter Koordinatorja EU za solidarnost (glej npr. člen 60 uredbe), vendar ne vzpostavlja celovitega in sistematičnega mehanizma spremljanja, vrednotenja in javnega poročanja o dejanskih rezultatih solidarnostnih ukrepov. To pomeni, da ni predvidenega rednega cikla evalvacije, ki bi omogočal oceno, ali solidarnostni prispevki dejansko dosegajo svoj namen, torej razbremenjevanje držav pod migracijskim pritiskom ter izboljšanje dostopa do zaščite. V nasprotju s Schengenskim ocenjevalnim in spremljevalnim mehanizmom, ki vključuje strukturirano fazo spremljanja in poročanja izvrševanja schengenskega pravnega reda, uredba takšnega nadzornega okvira ne pozna. To odpira tveganje, da solidarnost ostane deklarativna in se ne razvije v učinkovito orodje za preprečevanje sistemskih neravnovesij. Za legitimnost in uspešnost celotnega sistema bi bilo zato nujno zagotoviti bolj robusten institucionalni nadzor, ki bi vključil ne le tehnično spremljanje izvajanja, temveč tudi vsebinsko oceno učinkov na ljudi in države članice. Brez minimalnih meril uspešnosti ukrepanja Unije in primerljivih podatkov o rezultatih solidarnosti je tudi težko presojati, ali Unija dejansko uresničuje zahtevo »pravične delitve odgovornosti« iz člena 80 PDEU ali zgolj upravlja pričakovanja.

Poleg tega uredba ne določa jasnega in učinkovitega mehanizma prisile v primeru neizpolnjevanja solidarnostnih obveznosti. Če država ne izvede zavez, ki jih je sprejela v okviru letnega solidarnostnega načrta (npr. prispeva manj, kot znaša njen pravični delež ali pa sploh nič), uredba ne predvideva neposrednih sankcij ali avtomatičnih pravnih posledic (Maiani, 2024; Gerbaudo, 2025, str. 152), razen morda odvzem bodoče solidarnosti (Pütter & Nicolosi, 2025). To ustvarja tveganje ponovitve izkušenj iz Dublinskega sistema, v katerem je bila formalna vzpostavitev obveznosti brez učinkovite izvršljivosti pogosto neučinkovita v praksi. Solidarnostni mehanizem tako ohranja značaj politične zaveze brez trdne pravne obveznosti.

Problemizirati velja tudi institucionalno ravnotežje, saj je Evropski parlament izločen iz odločanja o ključnih vsebinah solidarnosti. Letni solidarnostni fond se sprejme v obliki sklepa Sveta na predlog Komisije, brez polnopravne vloge Parlamenta, čeprav gre za vprašanja, ki zadevajo temeljne pravice beguncev, finančne obveznosti držav in razporeditev bremen znotraj Unije. S tem se solidarnost premika iz sfere demokratične legitimacije v okvir tehničnega upravljanja.

Analiza premestitev in izbranih vidikov širšega solidarnostnega mehanizma se na tem mestu zaključuje, pri čemer bo njihova dejanska vrednost in učinkovitost pri prerazporejanju bremen v praksi v veliki meri odvisna od tega, kako dosledno in odgovorno bo celoten mehanizem implementiran s strani držav članic in institucij EU. ECRE (2024, str. 77) podobno splošno poudarja, da solidarnostni mehanizem z vidika pravic in zaščite prinaša tako priložnosti kot tveganja; njegov dejanski učinek bo odvisen od tega, kako bodo določbe uporabljene v praksi, kakšno težo

bo Komisija pripisala posameznim elementom pri presoji, kako bo potekal postopek ugotavljanja potreb ter kakšna solidarnost bo dejansko zagotovljena s strani držav članic. Kot pozitiven scenarij navaja možnost, da bi Komisija ob ugotovljenem migracijskem pritisku predvidela ukrepe za krepitev azilnega sistema in obsežnejše premestitve, kar bi lahko dejansko razbremenilo prizadeto državo. Hkrati pa opozarja, da so takšni scenariji v praksi redki, saj zahtevajo visoko stopnjo politične volje in dosledno izpolnjevanje zavez, široka diskrecija Komisije in nejasno opredeljeni ukrepi pa povečujejo tveganje, da solidarnost ostane simbolna ali usmerjena predvsem v nadzor meja.

KAJ NAS ČAKA V LETU 2026?

Prvi obeti glede dejanskega delovanja novega solidarnostnega mehanizma se že kažejo v dokumentih, sprejetih v okviru prvega letnega cikla upravljanja migracij, ki nakazujejo, kako naj bi se sistem začel izvajati v letu 2026. Čeprav mehanizem še ni v celoti operativen, ti začetni akti omogočajo vpogled v smer, v katero se utegne razvijati ter že odpirajo vprašanja o njegovi skladnosti z normativnimi ambicijami uredbe.

Zanimivo je, da je Svet v svojem predlogu za leto 2025, kot izhaja iz tiskovnega sporočila št. 1049/25 z dne 8. decembra 2025, določil solidarnostne ukrepe v višini 420 milijonov evrov oziroma 21.000 premestitev. Končna odločitev sicer še ni bila sprejeta, vendar dejstvo, da že v prvem prihajajočem letu delovanja mehanizma predvidene številke ne dosegajo minimalnih pragov, določenih v 12. členu uredbe (tj. 600 milijonov evrov oz. 30.000 premestitev), vzbuja določena vprašanja. Razlogov za nižje številke iz dokumenta ni mogoče razbrati, zato lahko o njih le sklepamo, a zdi se, da takšno odstopanje ni povsem skladno z uredbo, ki dopušča znižanje minimalnih pragov le v izjemnih primerih. Kljub temu pa je morda prezgodaj, da bi mehanizem že na tej podlagi obsodili na neučinkovitost. Možno je tudi, da gre za začetno fazo prilagajanja, ki bi lahko, če bo mehanizem ustrezno implementiran, v prihodnjih letih vodila k višji ravni solidarnostnih zavez.

Sklep Komisije št. 2025/2323 z dne 11. novembra 2025 pa kot države »pod migracijskim pritiskom« opredeljuje Ciper, Grčijo, Italijo in Španijo, saj naj bi visoko število prihodov v skladu s členom 2(24) uredbe nesorazmerno obremenjevalo njihove azilne, sprejemne in migracijske sisteme. Te države imajo torej do sredine leta 2026 pravico koristiti Solidarnostni fond. V drugo skupino držav, ki se soočajo z »resnimi migracijskimi razmerami« pa komisija uvršča Bolgarijo, Hrvaško, Češko, Estonijo, Avstrijo in Poljsko. Čeprav naj bi njihovi sistemi še delovali, pa jih preteklo visoko število prihodov razbremenjuje obveznosti prispevanja v fondu v skladu s členom 2(25) uredbe. Tretja skupina dvanajstih držav, kamor sodijo Belgija, Bolgarija, Nemčija, Estonija, Irska, Francija, Hrvaška, Latvija, Litva, Nizozemska, Poljska in Finska, pa je opredeljena kot skupina držav, »pri katerih obstaja tveganje migracijskega pritiska«. Te države naj bi imele prednostni dostop do nabora ukrepov. Njihovi

sistemi so sicer že močno obremenjeni, vendar še ne nesorazmerno, tveganje pa bi lahko povečali novi valovi prihodov.

SKLEPNO

V tem prispevku sem skušal odgovoriti na vprašanje, ali uredba o upravljanju azila in migracij kot osrednji del novega pakta o migracijah in azilu vzpostavlja tak normativni okvir, ki bo načelo solidarnosti iz člena 80 PDEU tudi dejansko sposoben uresničevati v praksi. Analiza kaže, da uredba nedvomno pomeni pomemben premik glede na prejšnjo ureditev: solidarnost ni več prepuščena zgolj ad hoc političnim dogovorom, temveč je umeščena v letni upravljavski cikel, opremljena z določenimi institucionalnimi mehanizmi in vsaj minimalno strukturirana skozi vnaprej predvidene oblike prispevkov. V tem pogledu gre za korak naprej v primerjavi z obdobjem po letu 2015, ko je bil odziv Unije v veliki meri reaktiven, krizno pogojen in politično razdrobljen.

Kljub temu pa osrednji problem, ki je v središču tega prispevka, ostaja le delno razrešen. Če je merilo uspešnosti novega mehanizma njegova sposobnost učinkovitega prerezporejanja bremen med državami članicami, potem je odgovor nujno zadržan. Uredba sicer uvaja solidarnostni okvir, vendar ne posega v zadostni meri v samo strukturo odgovornosti, ki še naprej sistematično obremenjuje geografsko izpostavljene države na zunanjih mejah Unije. Novi mehanizem zato deluje predvsem kot korektiv k obstoječemu sistemu, ne pa kot njegova temeljita preobrazba. To pomeni, da lahko v določenih okoliščinah omili posledice neenake porazdelitve odgovornosti, ne more pa jih zanesljivo in trajno odpraviti.

Prav na tej točki postane ključno vprašanje učinkovitosti pri prerezporejanju bremen. Uredba omogoča, da države članice prispevajo ne le s premestitvami, temveč tudi s finančnimi prispevki in alternativnimi ukrepi. Ta fleksibilnost nedvomno povečuje politično sprejemljivost sistema, vendar hkrati slabi njegovo redistributivno moč. Ker je fizična premestitev oseb edina oblika solidarnosti, ki neposredno prerezporedi odgovornost za obravnavo prošnje in sprejem prosilcev, finančni in alternativni ukrepi sami po sebi ne morejo v celoti nadomestiti dejanske razbremenitve držav prvega prihoda. Novi mehanizem zato ne zagotavlja nujno pravičnejše delitve bremen, temveč pogosto predvsem bolj razpršeno delitev stroškov upravljanja migracij. V tem smislu ostaja vprašanje, ali pakt solidarnost res operacionalizira kot delitev odgovornosti, ali pa jo pretežno preoblikuje v politično sprejemljivejšo obliko upravljanja obremenitev.

Dodatno omejitev predstavlja dejstvo, da je konkretna raven solidarnosti po novi ureditvi še vedno v veliki meri odvisna od politične volje držav članic in diskrecijske presoje institucij Unije. Široka diskrecija Komisije pri ugotavljanju migracijskega pritiska, odsotnost močnejših sankcij ob neizpolnjevanju zavez ter pomembna politična vloga Sveta pri določanju letnega obsega ukrepov kažejo, da solidarnost tudi po reformi ni v celoti preoblikovana v avtomatično, pravno določljivo obveznost.

Prav zato obstaja resno tveganje, da bo tudi novi sistem v praksi deloval predvsem takrat in v takšnem obsegu, kolikor bo to politično sprejemljivo za države članice.

V tem kontekstu je posebej pomembna opisana primerjava med obdobjem 2015–2016 in odzivom na razselitev iz Ukrajine po letu 2022, ki pokaže, da osrednji problem evropske azilne politike ni zgolj pomanjkanje solidarnosti, temveč tudi njena selektivna uporaba. To spoznanje je pomembno tudi za presojo novega pakta. Njegovega uspeha ni mogoče meriti zgolj po številu uvedenih mehanizmov ali po formalni prisotnosti solidarnostnega jezika v besedilu uredbe. Ključno bo, ali bo mehanizem v praksi dejansko prerazporejal bremena tako, da bo razbremenil države na zunanjih mejah, ne da bi pri tem zaščito reduciral na varnostno upravljanje migracij ali na selektivno pomoč politično sprejemljivejšim skupinam. Če bo solidarnost še naprej delovala predvsem kot fleksibilen politični kompromis, ne pa kot pravno zavezujoč korektiv strukturnih neenakosti, bo novi sistem težko presegel temeljne omejitve, ki so se razkrile že med begunsko krizo leta 2015.

Končna ugotovitev tega prispevka je zato dvojna. Po eni strani uredba pomeni pomemben institucionalni napredek, saj prvič vzpostavlja trajnejši in bolj strukturiran okvir za solidarnost med državami članicami. Po drugi strani pa ta okvir za zdaj še ne zagotavlja, da bo solidarnost tudi dejansko učinkovita pri prerazporejanju bremen. Dokler bo jedro sistema odgovornosti ostajalo nespremenjeno, dokler fizične premestitve ne bodo imele osrednje in ne le alternativne vloge, ter dokler bo izvajanje solidarnosti v tolikšni meri odvisno od politične volje, bo načelo iz člena 80 PDEU ostajalo uresničeno le delno. Novi pakt zato ne pomeni dokončne rešitve vprašanja evropske solidarnosti, temveč prej nov poskus njegovega upravljanja v pravno bolj strukturirani, a še vedno politično omejeni obliki.

IZJAVA O DOSTOPNOSTI RAZISKOVALNIH PODATKOV

V članku niso bili uporabljeni ali analizirani raziskovalni podatki.

VIRI IN LITERATURA

- Aleinikoff, T. A., & Owen, D. (2022). Refugee protection: 'Here' or 'there'? *Migration Studies*, 10(3), 464–483. <https://doi.org/10.1093/migration/mnac002>
- Bartenstein, A. (2021). *The European Council and the principle of solidarity: A contested concept* (Special Policy Brief). TRACK – Teaching and Researching the European Council, Universität zu Köln.
- Beirens, H. (2018). *Cracked Foundation, Uncertain Future: Structural weaknesses in the Common European Asylum System*. Migration Policy Institute Europe.
- Boffey, D. (2021, 22. oktober). *Ursula von der Leyen says EU will not fund 'barbed wire and walls'*. The Guardian. <https://www.theguardian.com/world/2021/oct/22/ursula-von-der-leyen-says-eu-will-not-fund-barbed-wire-and-walls>
- Bozorgmehr, K., Szecsenyi, J., Stock, C., & Razum, O. (2016). Europe's response to the refugee crisis: Why relocation quotas will fail to achieve 'fairness' from a health perspective. *European Journal of Public Health*, 26(1), 5–6. <https://doi.org/10.1093/eurpub/ckv246>
- Brekke, J.-P., & Brochmann, G. (2015). Stuck in Transit: Secondary Migration of Asylum Seekers in Europe, National Differences, and the Dublin Regulation. *Journal of Refugee Studies*, 28(2), 145–162. <https://doi.org/10.1093/jrs/feu028>
- Carrera, S., & Guild, E. (2015). *Can the new refugee relocation system work? Perils in the dublin logic and flawed reception conditions* (CEPS Policy Brief št. 334). Centre for European Policy Studies.
- Churrua Muguruza, C. (2022, 19. maj). *Selective Solidarity and Discrimination in the EU Response to Refugees*. GC Human Rights Preparedness. <https://www.gchumanrights.org/preparedness/selective-solidarity-and-discrimination-in-the-eu-response-to-refugees>
- De Bruycker, P. (2024a). Genealogy of and futurology on the pact on migration and asylum. *EU Immigration and Asylum Law and Policy*, 6.
- De Bruycker, P. (2024b). *The new European solidarity mechanism: Towards a fair sharing of responsibility between member states?* European Policy Centre Friedrich-Ebert-Stiftung FEPS, Foundation for European Progressive Studies.
- Del Monte, M., & Orav, A. (2024, 2. september). *Solidarity in EU asylum policy*. European Parliament. [https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI\(2020\)649344](https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI(2020)649344)
- Di Nunzio, P. (2023). The crisis of the Common European Asylum System: Rethinking solidarity in light of Human Rights. *Unio – EU Law Journal*, 8, 40–50. <https://doi.org/10.21814/unio.8.2.4760>
- Diab, J. L. (2025). Hues of Refuge: Framing Compassion and Condemnation in Refugee Portrayals Through a Political-Media Cycle of Reinforcement. *Journal of Race, Ethnicity, and Politics*, 1–30. <https://doi.org/10.1017/rep.2024.36>
- ECRE. (2024, maj). *ECRE Comments on the Regulation of the European Parliament and of the Council on Asylum and Migration Management, Amending*

- Regulations (EU) 2021/1147 and (EU) 2021/1060 and Repealing Regulation (EU) No 604/2013*. Refworld. <https://www.refworld.org/policy/intlegcomments/ecre/2024/en/148436>
- Evropska komisija. (2016). *Sporočilo Komisije Evropskemu parlamentu, Evropskemu svetu in Svetu. Prvo poročilo o premestitvi in preselitvi*. <https://eur-lex.europa.eu/legal-content/SL/TXT/HTML/?uri=CELEX:52016DC0165>
- Evropska komisija. (2020a). *Sporočilo Komisije Evropskemu parlamentu, Svetu, Evropskemu ekonomsko-socialnemu odboru in Odboru regij o novem paktu o migracijah in azilu*. https://eur-lex.europa.eu/legal-content/SL/TXT/?uri=CELEX%3A52020DC0609&lang1=SL&from=EN&lang3=choose&lang2=choose&_csrf=35df232a-48b3-486a-93c0-ac2f8429f96e
- Evropska komisija. (2020b). *Predlog uredbe Evropskega parlamenta in Sveta o upravljanju azila in migracij ter spremembi Direktive Sveta 2003/109/ES in predlagane Uredbe (EU) XXX/XXX [Fond za azil i migracije] (COM(2020) 610 final)*. EUR-Lex. <https://eur-lex.europa.eu/legal-content/SL/TXT/HTML/?uri=CELEX:52020PC0610>
- Evropski parlament. (2011). *Implementation of Article 80 TFEU on the principle of solidarity and fair sharing of responsibility, including its financial implications, between the Member States in the field of border checks, asylum and immigration* (Pripravili D. Vanheule, J. van Selm in C. Boswell). Sektor za državljanske pravice in ustavne zadeve. https://www.europarl.europa.eu/thinktank/en/document/IPOL-LIBE_ET%282011%29453167
- Farcy, J.-B., O'Neill, E., & Watt, D. (2016, 1. april). *Desperately searching for solidarity: The EU asylum saga continues*. EU Immigration and Asylum Law and Policy. <https://eumigrationlawblog.eu/desperately-searching-for-solidarity-the-eu-asylum-saga-continues/?print=print>
- Garcés-Mascreñas, B. (2015). Why Dublin doesn't work. *Notes internacionales CIDOB*, 135(1). https://www.movimientoeuropeo.it/images/TA_EuropaSolidale/NOTES_135_GARCES_ANG.pdf
- Geiger, R., Khan, D.-E., & Kotzur, M. (2015). *European Union Treaties: A Commentary: Treaty on European Union, Treaty on the Functioning of the European Union, Charter of Fundamental Rights of the European Union*. Beck.
- Gerbaudo, M. (2025). *The Interplay Between Solidarity and Agency in the New Pact on Migration and Asylum* [doktorska disertacija, Università Bocconi]. IRIS Università Bocconi. <https://hdl.handle.net/11565/4074065>
- Giancaspro, G., & Lucenti, F. (2024). Implicit hierarchies in the EU representation of refugees: A comparative text-analysis of the European Parliament's framing of Syrian and Ukrainian diasporas. *Italian Political Science Review / Rivista Italiana Di Scienza Politica*, 54(3), 175–189. <https://doi.org/10.1017/ipo.2024.10>
- Gotsova, B. (2019). Rules Over Rights? Legal Aspects of the European Commission Recommendation for resumption of Dublin transfers of asylum seekers to Greece. *German Law Journal*, 20(5), 637–659. <https://doi.org/10.1017/glj.2019.54>

- Grelsson, E. (2025). *Explaining the New Solidarity Mechanism in the EU's Migration Pact: Insights from three theoretical perspectives* [magistrsko delo, Univerza v Uppsali]. DiVA Portal. <http://www.diva-portal.org/smash/record.jsf?pid=diva2:1928427>
- Karageorgiou, E. (2020). The New Pact on Migration and Asylum: Why Pragmatism Cannot Engender Solidarity. *Nordic Journal of European Law*, 3(2), III. <https://doi.org/10.36969/njel.v3i2.22396>
- Loxa, A., & Stoyanova, V. (2022). Migration as a Constitutional Crisis for the European Union. V S. Smet & V. Stoyanova (ur.), *Migrants' Rights, Populism and Legal Resilience in Europe* (str. 139–164). Cambridge University Press. <https://doi.org/10.1017/9781009040396.009>
- Maiani, F. (2024). The new solidarity mechanism: The right “insurance scheme” for the CEAS. *EU Immigration and Asylum Law and Policy*, 27.
- Marin, L., Penasa, S., & Romeo, G. (2020). Migration Crises and the Principle of Solidarity in Times of Sovereignism: Challenges for EU Law and Polity. *European Journal of Migration and Law*, 22(1), 1–10. <https://doi.org/10.1163/15718166-12340066>
- Mitsilegas, V. (2014). Solidarity and Trust in the Common European Asylum System. *Comparative Migration Studies*, 2. <https://doi.org/10.5117/CMS2014.2.MITS>
- Ocak, P. A., & Erhan, Ç. (2021). A Litmus Test for the EU's Longest Year: Solidarity Principle and Challenges by COVID-19 in 2020. *Uluslararası İlişkiler Dergisi*, 18(71), 21–43. <https://doi.org/10.33458/uidergisi.947511>
- Pepinsky, T. B., Reiff, Á., & Szabó, K. (2024). The Ukrainian Refugee Crisis and the Politics of Public Opinion: Evidence from Hungary. *Perspectives on Politics*, 22(4), 989–1014. <https://doi.org/10.1017/S1537592724000410>
- Pütter, H., & Nicolosi, S. (2025, 10. december). *The Ghost of Dublin still Among Us*. Verfassungsblog. <https://verfassungsblog.de/annual-migration-management-cycle/>
- Ramji-Nogales, J. (2022). Ukrainians in Flight: Politics, Race, and Regional Solutions. *American Journal of International Law*, 116, 150–154. <https://doi.org/10.1017/aju.2022.22>
- Sangiovanni, A. (2013). Solidarity in the European Union. *Oxford Journal of Legal Studies*, 33, 213–241. <https://doi.org/10.1093/ojls/gqs033>
- Santos Vara, J. (2022). Flexible Solidarity in the New Pact on Migration and Asylum: A New Form of Differentiated Integration? *European Papers – A Journal on Law and Integration*, 7(3), 1243–1263. <https://doi.org/10.15166/2499-8249/613>
- Saracino, D. (2024). Understanding solidarity in the European Union: An analytical framework. *Theory and Society*, 53(5), 1093–1118. <https://doi.org/10.1007/s11186-024-09566-3>
- Sharpston, E. (2019, 31. oktober). *Sklepni predlogi generalne pravobranilke v zadevi C-715/17*. European Court of Justice. <https://curia.europa.eu/juris/document/t.f?text=&docid=219670&pageIndex=0&doclang=SL&mode=req&dir=&occ=-first&part=1&cid=2183619>
- Svet Evropske unije. (2022). Izvedbeni sklep Sveta (EU) 2022/382 z dne 4. marca 2022 o ugotovitvi obstoja množičnega priliva razseljenih oseb iz Ukrajine v

- smislu člena 5 Direktive 2001/55/ES in o uvedbi začasne zaščite. Uradni list Evropske unije, L 71, 1–6. https://eur-lex.europa.eu/eli/dec_impl/2022/382/oj?eliuri=eli%3Adec_impl%3A2022%3A382%3Aoj&locale=sl
- Trilling, D. (2015, 7. oktober). What to do with the people who do make it across? *London Review of Books*, 37(19). <https://www.lrb.co.uk/the-paper/v37/n19/daniel-trilling/what-to-do-with-the-people-who-do-make-it-across>
- Tsourdi, E. (2017, 12. december). Solidarity at work? The prevalence of emergency-driven solidarity in the administrative governance of the Common European Asylum System. *Maastricht Journal of European and Comparative Law*, 24, 667–686. <https://doi.org/10.1177/1023263X17742801>
- Tsourdi, E. (2020). COVID-19, Asylum in the EU, and the Great Expectations of Solidarity. *International Journal of Refugee Law*, 32(2), 374–380. <https://doi.org/10.1093/ijrl/eeaa023>
- Tubakovic, T. (2017). *The Dublin IV recast: A missed opportunity* (Special Policy Brief). Refugee Research Online. <https://doi.org/10.13140/RG.2.2.23230.0288>
- Vignon, J. (2011, 26. junij). *Solidarity and responsibility in the European Union*. Institut Jacques Delors. <https://institutdelors.eu/en/publications/solidarity-and-responsibility-in-the-european-union>

SUMMARY

BETWEEN RESPONSIBILITY AND SOLIDARITY: THE EU'S NEW SOLIDARITY MECHANISM AND ITS LIMITS IN REDISTRIBUTING BURDENS

Urh Šelih

This article examines whether the new solidarity mechanism introduced by the Asylum and Migration Management Regulation (AMMR), adopted as part of the 2024 Pact on Migration and Asylum, marks a genuine shift from politically contingent solidarity to a more operationalized legal framework under Article 80 TFEU. The Regulation replaces ad hoc crisis responses with a permanent solidarity structure based on an Annual Solidarity Pool, combining relocations, financial contributions, and alternative solidarity measures.

The article argues that the AMMR constitutes an important institutional and normative development but only a partial answer to the structural weaknesses of the Common European Asylum System. Its central contribution lies in making solidarity more predictable and procedurally organized. However, its capacity to redistribute burdens effectively remains limited. Since only relocations directly transfer responsibility for asylum seekers, financial, and alternative contributions cannot fully compensate for the unequal pressures borne by states at the EU's external borders. In that sense, the mechanism often redistributes the costs of migration management rather than responsibility itself.

The article further argues that the AMMR preserves the core logic of the Dublin system, which continues to allocate primary responsibility to states of first entry. The crisis of 2015–2016 demonstrated not only the absence of effective solidarity but also the instability of a system that assumes asylum seekers will remain in the state assigned by law, despite their own family, linguistic, social, and integration-related preferences. The new mechanism does not fundamentally resolve this tension.

Particular attention is paid to relocations as the clearest expression of solidarity. Although the AMMR regulates them more systematically, they remain administratively complex, restrictive for asylum seekers and only partially detached from Dublin responsibility rules. The article also highlights broad institutional discretion, weak enforcement, and limited monitoring, which risk turning solidarity into a flexible political instrument rather than a stable legal obligation.

Finally, the article places the new mechanism in the broader context of selective solidarity in EU asylum law. Comparing the contested response to refugee arrivals in 2015–2016 with the swift activation of temporary protection for displaced persons from Ukraine in 2022, it argues that solidarity in practice has been uneven and politically conditioned. The AMMR may improve coordination, but without deeper reform of the allocation of responsibility, it risks reproducing the very asymmetries it is meant to correct.

OGLASI V SLOVARJIH ZA SLOVENSKE PRISELJENCE V ZDA NA ZAČETKU 20. STOLETJA

Alenka Vrbinc,^I Donna M. T. Cr. Farina,^{II} Marjeta Vrbinc^{III}

COBISS 1.01

IZVLEČEK

Oglasi v slovarjih za slovenske priseljence v ZDA na začetku 20. stoletja

Slovarji za priseljence so namenjeni ljudem, ki pridejo v deželo, kjer se srečajo z novo kulturo. Vključujejo posebne iztočnice in različne informacije, ki jih potrebuje ta ciljna skupina. Oglasi v takih slovarjih nagovarjajo novo kulturno realnost in pomagajo pri oblikovanju kulturne identitete priseljencev. Avtorice v prispevku analizirajo oglase v dveh slovarjih z jezikovnim parom slovenščina – angleščina. Preučevani oglasi oglašujejo bankirje in notarje, časopise, založniške hiše in podjetja, ki ponujajo prekoceanske prevoze s parniki. Oglasi odražajo prilagajanje priseljencev novemu kulturnemu okolju in so pogosto oblikovani v skladu z interesi uporabnikov, kar pomeni, da so personalizirani podobno kot sodobni spletni slovarji.

KLJUČNE BESEDE: slovenski priseljenci v ZDA, slovarji za priseljence, oglasi, kulturna identiteta, identiteta priseljencev

ABSTRACT

Advertisements in Dictionaries for Slovenian Immigrants to the United States at the Beginning of the Twentieth Century

Immigrant dictionaries are intended for immigrants in a new cultural context; they contain specialized lemmas and information targeted at immigrants' specific needs. Advertisements in such dictionaries both address the new cultural reality and help shape immigrants' cultural identity. This article analyzes advertisements in two dictionaries for the Slovenian–English language pair. The advertisements promote bankers and notaries, newspapers, publishing houses, and steamship companies, and they reflect immigrants' acculturation process. They are often targeted to users' interests in ways that are comparable to the personalization found in many of today's online dictionaries.

KEY WORDS: Slovenian immigrants to the United States, immigrant dictionary, advertisements, cultural identity, immigrant identity

^I dr. jezikoslovnih znanosti, redna profesorica; Univerza v Ljubljani, Ekonomska fakulteta; alenka.vrbinc@ef.uni-lj.si; ORCID <https://orcid.org/0000-0002-7330-4158>

^{II} dr. jezikoslovnih znanosti, redna profesorica; Univerza New Jersey City, Multicultural Center, ZDA; dfarina@njcu.edu; ORCID <https://orcid.org/0000-0001-5695-7782>

^{III} dr. jezikoslovnih znanosti, redna profesorica; Univerza v Ljubljani, Filozofska fakulteta, Oddelek za anglistiko in amerikanistiko; marjeta.vrbinc@ff.uni-lj.si; ORCID <https://orcid.org/0000-0002-6866-6023>

UVOD

Slovarji za priseljence so podvrsta slovarjev za tujejezične govorce. Od slednjih se razlikujejo po vključevanju informacij, prilagojenih potrebam priseljencev v novem kulturnem okolju (Xue & Tarp, 2018, str. 386). Različni avtorji navajajo različne vrste informacij, ki jih vključujejo slovarji za priseljence in so prilagojene njihovim specifičnim potrebam. Oddrun Grønvik (2016) omenja vključevanje konceptov, ki v domačem kulturnem okolju priseljenca niso poznani. Ruth V. Fjeld (2012) kot primer tovrstnih informacij navaja parlamentarna pravila, vključena v norveški slovar za priseljence v ZDA, ki je izšel proti koncu 19. stoletja v Minneapolisu v ameriški zvezni državi Minnesota. Vacalopoulou et al. (2011) poudarjajo pomen informacij, ki jih priseljenci potrebujejo pri komuniciranju tako v uradnem kot tudi neuradnem družbenem okolju; kot primer navajajo prošnjo za izdajo dovoljenja za bivanje in delo v Grčiji. V angleško-slovaškem slovarju za slovaške priseljence v ZDA z začetka 20. stoletja (Kadak, 1905b) najdemo pod naslovom *Slovenský národ* (»Slovaški narod«) daljši razdelek z vprašanji in odgovori, ki je bil Slovakom v pomoč pri pogovorih z uradniki in običajnimi ljudmi v ZDA in Kanadi, npr. ko so se morali predstaviti, povedati, od kod so, ipd. Kathryn Kavanagh (2000, str. 101) raziskuje besede in pomene, ki izražajo odnose, načine in družbene norme; kot primer lahko navedemo razdelek v angleško-slovaškem slovarju o komuniciranju na delovnem mestu: *Good morning, boss, I am looking for work; do you need help?* (»Dobro jutro, šef, iščem delo; ali potrebujete delavce?«; Kadak, 1905b, str. 66); *I like to dig bituminous [pravilno bituminous] coal best* (»Najraje kopljem bituminozni premog«; Kadak, 1905b, str. 68). Vacalopoulou et al. (2011) menijo, da bi bilo treba vključevati tudi lastna imena, kot so zemljepisna imena ter imena uradov ali organizacij. V številnih slovarjih za priseljence so tovrstne informacije vključene v posebnih razdelkih v neslovarskem delu, vendar jih je mogoče vključevati tudi kot iztočnice v geslovnik. Vrbinc et al. (2025) preučujejo kulturno specifične kriterije za izbor iztočnic v slovarjih za priseljence in poudarjajo, da bi bila iztočnica, ki bi se v kakšnem drugem priročniku zdela nenavadna, povsem ustrezna v slovarju za priseljence (npr. *otročnica*, vključena v Kubelko 1904, str. 76, in Kubelko 1912b, str. 365).

Poleg zgoraj omenjenih vrst informacij moramo omeniti še informacije, ki so jih priseljenci lahko našli v oglasih. Pri preučevanju dvojezičnih slovarjev z angleščino in slovenščino, ki so izšli na začetku 20. stoletja in so bili namenjeni slovenskim priseljencem v ZDA, smo naleteli na personalizirane oglase, prilagojene uporabnikom, kar lahko primerjamo z oglasi v sodobnih spletnih slovarjih (Dziemianko, 2020). Tako kot številne druge informacije, prilagojene priseljencem, ki so slednjim v pomoč pri prilagajanju novemu kulturnemu okolju, so tudi oglasi prilagojeni njihovi kulturni realnosti, hkrati pa pomagajo oblikovati njihovo novo kulturno identiteto.

Glede na to, da se je v obdobju med letoma 1880 in 1918 iz Avstro-Ogrske v ZDA izselilo več kot 3,9 milijona ljudi (Granatir Alexander, 2009), med katerimi so bili tudi številni Slovenci, so bili (dvojezični) priročniki med priseljenci zelo iskani. V

prispevku bomo preučevali vlogo oglasov v slovarjih za slovenske priseljence v ZDA v času največjega vala izseljevanja, na prelomu 19. in 20. stoletja. Le redki slovarji za priseljence iz tega obdobja so vključevali oglase, vsebina teh oglasov pa je bila v slovarjih z različnimi jeziki zelo podobna, ker so imeli priseljenci – pripadniki različnih narodov in etničnih skupin – podobno življenje in podobne potrebe v novi domovini, prav tako pa so se na podoben način prilagajali novemu kulturnemu okolju.

OGLASI IN KULTURA

V raziskavah oglasov so raziskovalci med drugim preučevali, ali in kako ti vplivajo na družbeno in kulturno identiteto posameznikov in skupin. Oglasi so v prvi vrsti namenjeni prepričevanju ljudi, naj kupijo določeni izdelek ali storitev, vendar pa hkrati vplivajo tudi na posameznikovo dožemanje kulture (Pogačar, 2023) ali pa celo spreminjajo posameznikovo dožemanje samega sebe, zaradi česar moramo pri njihovem preučevanju izhajati iz razumevanja konceptov kulturne in osebne identitete ter razumevanja vplivov priseljevanja na te koncepte.

Identiteta in prilagajanje novemu kulturnemu okolju

Razumevanje oglasov v slovarjih za priseljence zahteva kratko opredelitev pojma identitete v kontekstu migracij. Identitete ne razumemo kot statične ali esencialne lastnosti posameznika, temveč kot proces, ki se oblikuje v interakciji med posameznikom in družbenim okoljem (Bhugra, 2004; Schwartz et al., 2006). V migracijskem kontekstu se ta proces odvija v pogojih akulturacije, to je stika med različnimi kulturnimi sistemi (Gibson, 2001; Perruchoud, 2004).

Pri tem je pomembno poudariti, da je identiteta večplastna in situacijska. Priseljenci lahko hkrati ohranjajo vezi s staro domovino in razvijajo nove oblike pripadnosti v državi priselitve. V tem smislu je identiteta rezultat medsebojnega delovanja kontinuitete in spremembe.

V članku ne predpostavljamo, da raba jezika sama po sebi pomeni občutenje identitete. Jezik in druge simbolne reference (npr. sklicevanje na »staro domovino« ali na »Slovence« kot skupnost) razumemo kot diskurzivna sredstva, ki omogočajo javno artikulacijo pripadnosti in vzpostavljanje simbolnih meja skupine (prim. Barth, 1969/1998). Oglasi v slovarjih zato ne dokazujejo individualne identifikacije, temveč predstavljajo del širšega komunikacijskega prostora, znotraj katerega se lahko oblikuje in utrjuje priseljska skupnost.

Takšno razumevanje identitete nam omogoča, da oglasov ne analiziramo le kot ekonomska sporočila, temveč tudi kot elemente simbolnega okolja, v katerem so slovenski priseljenci v ZDA vzpostavljali svojo prisotnost v skupnosti.

Vloga oglasov: Od predstavitve izdelka do nakupa

Vestergaard & Schrøder (1985) ugotavljata, da so oglasi v prvi vrsti namenjeni prepričevanju potencialnih kupcev k nakupu, vendar pa je iz njih subtilno razvidno, kaj potencialni kupci »nujno« potrebujejo; hkrati oglasi tudi vplivajo na njihov način življenja. Po mnenju Judith Williamson (1985) ljudje na podlagi oglasov menijo, da je ekonomska osnova družbe boljša, vrednote, ki jih sporočajo, pa so oblika ideologije. Guy Cook (1992) preučuje besedila oglasov v interakciji z drugimi besedili in z ljudmi, ki naletijo na ta besedila; pod vplivom oglasov se (vsaj deloma) vzpostavlja tudi njihova identiteta. Daniel Pope (2003, str. 1) poudarja, da oglasi prikrito kažejo svoj namen ali prikazujejo družbeni in kulturni kontekst svojega nastanka, tako da je treba določiti, kakšen je namen oglasa in kako ta vpliva na ciljno publiko. Obenem opozarja, da moramo biti pri analiziranju oglasov kot zgodovinskega gradiva pozorni na njihov selektivni prikaz družbe, saj oglaševalska industrija raje prikazuje svet, za katerega si potrošniki prizadevajo, ne pa svet, v katerem dejansko živijo. Oglasi pošiljajo sporočila o kulturi, vendar so ta sporočila popačena. Pope (2003, str. 6) poudarja, da se je v ZDA družba zaradi industrializacije bistveno spremenila, poleg tega pa je industrializacija pomembno vplivala tudi na razvoj oglaševanja. Oglaševanje na nacionalni ravni je postalo pomembnejše šele proti koncu 19. stoletja, s pojavom večjega števila množično proizvedenih izdelkov.

Neja Blaj Hribar (2016, str. 59–60) raziskuje zgodovinski razvoj oglaševanja na območju sedanje Slovenije na prelomu med 19. in 20. stoletjem, to je v obdobju, ko sta v ZDA izšla angleško-slovenska slovarja, v katerih so bili objavljeni oglasi, ki so predmet naše analize. Ker je zgodovina oglaševanja tesno povezana z zgodovino medijev, se osredotoča na analizo *Slovenskega naroda* in *Slovenca*, dveh osrednjih dnevnih časopisov na Kranjskem. V *Slovenskem narodu* je bil prvi oglas objavljen leta 1868, v *Slovincu* pa najdemo oglase od prve izdaje leta 1873 naprej. Blaj Hribar (2016, str. 60) ugotavlja, da so oglasi na začetku vsebovali samo besedilo, torej so opisovali in ponujali izdelke in storitve, na prelomu stoletja pa so se začeli pojavljati slikovni oglasi. Po letu 1887 so v slovenskih časopisih prevladovali oglasi, v katerih so oglaševali domačo obrt in trgovino. Ponujali so zelo različne izdelke, kot so lekarniški izdelki, lepotni pripomočki, oblačila, čevlji, pripomočki za izgubljanje in pridobivanje teže, alkoholne pijače in izdelki, ki pomagajo pri odvijanju od alkohola, šivalni stroji, pripomočki za prekrivanje sivih las, avtomobili, kolesa, oglaševali so domače in tuje zavarovalnice, denarne zavode itd. Različna podjetja so oglaševala tudi potovanja v Ameriko, kar je kazalo na problem izseljevanja (Blaj Hribar, 2016, str. 65). Predpostavljamo lahko, da so vsaj nekateri slovensko govoreči priseljenci v ZDA poznali oglase v časopisih v domovini, vendar so v ZDA naleteli na razvitejšo obliko oglaševanja, ki pa jim zaradi izkušnje z oglasi v domovini ni bilo tuje. V nasprotju z nekaterimi časopisnimi oglasi so oglasi v preučevanih slovarjih za priseljence izdelke ali storitve oglaševali na bolj nevsiljiv način.

Oglasi v slovarjih

Kot ugotavlja Michael Hancher (2015), je oglaševanje v knjigah, vključno s slovarji, v znanstveni literaturi povsem zanemarjeno. Opaža, da se je vsebina oglasov v anglosaških slovarjih, ki jih je preučeval, kar precej spreminjala: namenjeni so bili lahko predstavitvi izdelkov oz. storitev različnih naročnikov, ustvarjanju in uveljavljanju blagovne znamke za doseganje prepoznavnosti, prodaji drugih publikacij založnika ipd.

Roderick W. McConchie (2024) je preučeval slovarje, ki jih je poimenoval »promocijski slovarji«. Predpostavljal je, da so izdajo teh slovarjev financirala podjetja, ki so slovarje podarjala kot reklamna darila, s čimer so skušala prepričati kupce, da bi kupili njihove proizvode. McConchie ugotavlja, da nekateri od teh slovarjev vključujejo manjše število oglasov, v drugih pa je oglaševanje v ospredju, tako da je slovar v bistvu sekundarnega pomena. V raziskavo je vključil zelo različne slovarje, ni pa povsem jasno, ali so podjetja vse te slovarje res uporabljala kot reklamna darila. Tako je na primer omenil štiri verzije Worcesterjevega *Pocket dictionary of the English language* (»Žepni slovar angleščine«) iz leta 1887, ki na zadnji platnici vključujejo oglas za povsem različna podjetja: C. S. Mersick and Co., State Street, New Haven, Connecticut, proizvajalec železnine in kovinskih izdelkov; časopis *The Weekly Star* (1853–1891), Washington, DC; J. H. Schenk, proizvajalec patentiranih zdravil iz Filadelfije; ter založba People's Publishing iz Čikaga (McConchie, 2024, str. 81). McConchie pri tem ne omenja, kako se je ta slovar uporabljal oz. kdo ga je financiral. Za primerjavo lahko navedemo enega od analiziranih slovarjev (Kubelka, 1912b), ki na koncu slovarskega dela in na zadnji platnici vključuje več oglasov. Dokazov, da je ta slovar – ali katerega drugega izmed slovarjev, namenjenih priseljencem – financiralo kakšno podjetje, nimamo, prav tako ni dokazov, da so te slovarje dajali kot reklamna darila.

Pri pregledu literature nismo našli nobene raziskave, ki bi se osredotočala na oglase v (dvojezičnih) slovarjih za priseljence. Tovrstni slovarji le zelo redko vsebujejo oglase, nujno pa morajo vključevati druge informacije, specifične za novo domovino, s pomočjo katerih se priseljenci lažje prilagajajo novemu kulturnemu okolju. Kot primera slovarjev, ki vključujejo oglase, lahko navedemo *Praktický slovensko-anglický tlumač. The practical Slovak American interpreter* (angleško-slovaški in slovaško-angleški slovar; Kadak, 1905a) ter *Taschen-Wörterbuch Für Deutsch Sprechende Immigranten* (»Žepni slovar za nemško govoreče priseljence«), ki je izšel v Avstraliji v začetku 60. let 20. stoletja. V Kadakovem slovarju najdemo štiri oglase – enega za dnevnik *Slovák v Amerike* (»Slovak v Ameriki«), ki je začel izhajati leta 1889, ter drugega za istoimensko založbo in tiskarno. V oglasu za dnevnik je poudarek na objektivnih novicah in zanesljivosti časopisa, v oglasu za založbo in tiskarno pa je navedeno, da tiskajo najrazličnejše stvari, kot so plakati, ovojnice, računi in vstopnice. Na naslovnici Kadakovega slovarja je ime iste založbe, kar pomeni, da je založba v slovarju, ki ga je natisnila, objavila oglas zase. Tretji oglas je oglas za podjetje Dennik

Slovák v Amerike, v katerem oglašujejo prodajo vozovnic za parnike in vlake. Četrtri oglas pa je za podjetje P. K. Kadak Co. iz Scrantona v Pensilvaniji, ki je bilo bodisi knjigarna bodisi skladišče za knjige. V *Taschen-Wörterbuch Für Deutsch Sprechende Immigranten* najdemo oglase za različna podjetja (stanovanjske družbe, zavarovalnice, prodajalce avtomobilov, agencije za zaposlovanje), ki so financirala izdajo tega slovarja (*Taschen-Wörterbuch*, b. d.)

V širši raziskavi (Vrbinc et al., 2024) smo preučevali šest dvojezičnih slovarjev in drugih priročnikov za jezikovni par angleščina – slovenščina, ki so bili namenjeni slovenskim priseljencem v ZDA, izšli pa so konec 19. oz. v začetku 20. stoletja. Z izjemo dveh slovarjev, ki ju je sestavil Viktor Kubelka in sta izšla v letih 1904 in 1912, ostali priročniki oglasov ne vključujejo,¹ zato jih v tem prispevku ne obravnavamo. Glede na to, da sta obravnavana slovarja izšla v ZDA, odražata oglaševalsko kulturo, značilno za ZDA v tistem obdobju. Kot smo že omenili, lahko iz razprave Anne Dziemianko (2020) o oglaševanju v spletnih slovarjih potegnemo določene vzporednice med oglasi v preučevanih slovarjih, ki so izšli pred več kot 100 leti, ter oglasi v sodobnih spletnih slovarjih. Dziemianko pojasnjuje, da je mogoče s pomočjo spleta zlahka ugotoviti, kaj zanima uporabnike oz. čemu dajejo prednost, s tem pa je tudi personalizacija oglasov zelo enostavna. Na začetku 20. stoletja so slovarje sestavljali za specifične skupine priseljencev, ki so govorili isti jezik, opravljali enako ali podobno delo ter živeli v enakih hišah v istih ameriških mestih ali istih zveznih državah. V obeh preučevanih slovarjih smo analizirali vse vključene oglase, za katere ugotavljamo, da so nagovarjali potrebe ciljnih uporabnikov, ki jih je avtor – tudi sam priseljenec – dobro poznal.

VIKTOR KUBELKA IN NJEGOVA SLOVARJA

Viktor Kubelka

Biografskih podatkov o Viktorju Kubelki je zelo malo, tako da bomo na kratko povzeli nekaj osnovnih dejstev. Rodil se je 29. 4. 1879 v Ljubljani očetu Wenzlu Kubelki in mami Marii, rojeni Lachainer, pri krstu pa je dobil ime Viktor Maria Johann Nep (Župnija Sv. Petra v Ljubljani, 1877–1884, str. 106). V Ljubljani je obiskoval klasično gimnazijo (*Jahresbericht des k. k. Staats – Obergymnasiums*, 1893), kjer je maturiral leta 1899. Po maturi je delal pri trgovcu Vinku Majdiču v Kranju, nato pa se je leta 1902 izselil v ZDA. Po prihodu v ZDA je najprej delal kot knjigovodja pri Franku Sakserju, nato pa pri »neki italijanski tvrdki« (Kristan, 2013; *Slovenski narod*, 1903).

¹ Kubelka je v svoj priročnik z uporabnimi pogovarjalnimi stalnimi izrazi (Kubelka, 1912a) vključil dva oglasa za Avstro-amerikansko parobrodarsko progo. Eden od oglasov je identičen kot v njegovi knjigi *Slovensko-angleška slovnica, tolmač, spisovnik in navodilo za naturalizacijo. Angleško-slovenski in slovensko-angleški slovar* (Kubelka, 1912b), drugi pa je vsebinsko podoben, zato smo ga izključili iz pričujoče raziskave.

Služboval je tudi kot bančni uradnik v New Yorku (*Slovenec: političen list za slovenski narod*, 1911), kot uradnik in zastopnik za Avstro-amerikansko parobrodarsko družbo (*Amerikanski Slovenec*, 1912), kot potovalni zastopnik prekmorske proge Holland American (*Ameriška domovina*, 1921) ter kot ataše češkoslovaške trgovske komisije v New Yorku (*Ameriška domovina*, 1919). Med ameriškimi Slovenci je slovel kot odličen prosvetni in gospodarski delavec (*Slovenec: političen list za slovenski narod*, 1935). V različnih službah je prihajal v stik s slovenskimi priseljenci, hkrati pa se je dobro seznanil tudi s kulturnim okoljem v ZDA. Umrli je 24. 9. 1961 v Callicoonu v zvezni državi New York.

Kubelkova slovarja

V raziskavi smo preučevali naslednja dva Kubelkova slovarja, ki vključujeta oglase, izdana pa sta bila v samozaložbi, saj je v obeh kot založnik naveden sam Kubelka:

- *Slovenian-English pocket dictionary to facilitate the study of both languages. Slovensko-angleški žepni rečnik v olajšavo naučenja obeh jezikov* (Kubelka, 1904);
- *Slovensko-angleška slovnica, tolmač, spisovnik in navodilo za naturalizacijo. Angleško-slovenski in slovensko-angleški slovar. Slovenian-English grammar, interpreter, letterwriter and information on naturalization* (Kubelka, 1912b).

Preučili smo dva izvoda prvega slovarja (Kubelka, 1904), ki sta dostopna v digitalizirani obliki v digitalni knjižnici Hathi Trust. Gre za isto izdajo slovarja – oba izvoda sta videti povsem enaka, edina razlika med njima pa je, da v izvodu iz knjižnice Univerze v Princetonu ni oglasov, v izvodu iz Kongresne knjižnice pa so trije: en oglas je na začetku (pred naslovnima stranema), dva pa na koncu slovarja; to je verjetno posledica tega, da sta bila ta dva izvoda v preteklosti na novo vezana. V prispevku bomo analizirali izvod z oglasi. V drugem slovarju (Kubelka, 1912b) je vseh osem oglasov na koncu slovarja. V nadaljevanju poglavja sledijo opisi posameznih oglasov, ki smo jih glede na tematiko razdelili v tri skupine: oglasi za bankirje in zastopnike (gl. Frank Zotti & Co., Frank Medosh, K. W. Kempf in Frank Sakser), za časopise in druge publikacije (*Glas naroda*, *Narodni vestnik*, tiskarna Slovenske tiskovne družbe in Kubelkove publikacije) ter za ladijske prevoznike (gl. podpoglavje »Avstro-amerikanska parobrodarska proga«).

OGLASI V OBEH PREUČENIH KUBELKOVIH SLOVARJIH

Frank Zotti & Co.

V prvem Kubelkovem slovarju (Kubelka, 1904) sta dva oglasa za banko Frank Zotti & Co.² Prvi oglas (Slika 1) oglašuje to banko s sedežem v New Yorku (naslov banke je naveden) in podružnico v Pittsburghu (naslov podružnice je naveden). Zottijeva banka je zaračunavala provizijo za nakazovanje denarja v Evropo, ukvarjala pa se je tudi s prodajo vozovnic za parnike. Med strankami banke so bili nekvalificirani in pogosto zgolj polpismeni priseljenci (Hrvati, Čehi, Slovaki, Slovenci, Italijani), ki so delali v rudnikih in jeklarnah v okrožju Allegheny v zahodni Pensilvaniji, zaradi česar je banka odprla podružnico v Pensilvaniji.

BANČNA PODRUŽNICA
Slovenec dobro znana bančna tvrdka
Frank Zotti & Co.
108 GREENWICH ST., ✱ NEW YORK.
odprla je svojo podružnico
v Pittsburg Pa. na 609 Smithfield St.

Vsim Slovincem iz Pittsburga, Alleghenija in okolice naznanjamo, da se v usaki potrebi obrnejo na našo podružnico, u kateri so ravnotako zastopani vsi oddelki, kakor v naši centrali, to je bančni, parobrodski itd.

Opozorujemo usakega, kdor pošilja denar v domovino na naše denarne cene, da se prepriča, da je naša tvrdka edina, kateri je mogoče potako nizkih, cenah, hitro in zanesljivo odposiljati denar.

Jamčimo vsakemu popotniku, da pri nas kupi ceneje parobrodске listke, kakor v katerikoli drugi banki.

Popotnike naše podružnice spremljujejo naši vslužbenci iz Pittsburga u New York, kjer jih odpravijo, kakor tudi njih prtljago, brezplačno na parobrod.

Bratje Slovenci iz Pittsburga, Alleghenija in okolice naj se, hodisi v kateremkoli slučaju potrebe osebno podajo v našo podružnico kjer bo dobil vsak razjasnilo in nasvet.

Podružnica je odprta ob delavnikih od 8. zjutraj do 8. zvečer, ob sabotah pa do 10. zvečer.

FRANK ZOTTI & CO.
609 Smithfield Street, ✱ ✱ Pittsburg Pa.

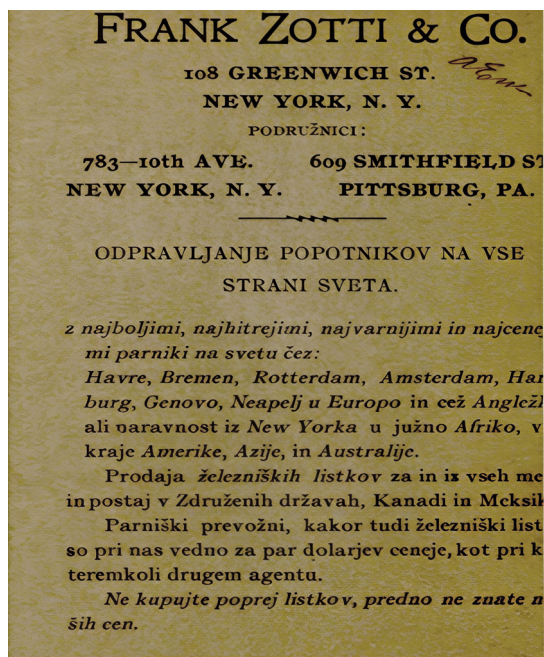
Slika 1: Prvi oglas za banko Frank Zotti & Co. iz Kubelkovega slovarja *Slovenian-English pocket dictionary to facilitate the study of both languages*. Slovensko-angleški žepni rečnik v olajšavo naučenja obeh jezikov (Kubelka, 1904).

2 Frank Zotti (1872–1947) je bil po rodu Hrvat iz Boke Kotorske. Poznan je bil tudi po vzdevku »Kralj Hrvatov« (»Bankrupt banker«, 1908; »Zotti charges conspiracy«, 1908; Kraljic Curran, 1989). V lasti je imel parnik Brooklyn, ustanovil je hrvaško-ameriški časopis *Narodni list (USA)* in je aktivno deloval v hrvaških organizacijah.

Oglas je nevpadljiv, ne vključuje slik, ampak samo strnjeno besedilo, ki je razdeljeno na šest informativnih odstavkov. Prepričevanje potencialnih strank je relativno nevsiljivo. Kot je omenjeno v prvem odstavku, je oglas namenjen točno določeni ciljni publiki – vsem Slovencem iz Pittsburgha, Alleghenya in okolice. V drugem odstavku dobijo potencialne stranke, ki želijo poslati denar v domovino, nasvet, naj preverijo cene in se tako prepričajo, da je Frank Zotti & Co. cenejši, hitrejši in zanesljivejši od konkurence. Tudi v tretjem odstavku je poudarek na cenah, po katerih ta banka prodaja vozovnice za parnike, ki so nižje kot cene v drugih bankah. V četrtem odstavku banka oglašuje še dodatno storitev za kupce vozovnic: uslužbenec banke stranko brezplačno pospremi iz Pittsburgha v New York, kjer jo skupaj s prtljago spravi na parnik. V petem odstavku se ponovi dikcija iz prvega odstavka, le da je pred »Slovenci iz Pittsburgha, Alleghenya in okolice« dodana še beseda »bratje«. Slovence v tem odstavku pozovejo, naj obišejo podružnico banke, če potrebujejo kakšno pojasnilo in nasvet. V šestem odstavku je naveden delovni čas podružnice.

Oglas je preprost, ne vključuje šal, metafor, sloganov ali besednih iger. Ciljne publike ne pritegne zaradi kakšnih posebnih značilnosti, po katerih bi izstopal, ampak zato, ker oglašuje storitve, ki jih ta publika nujno potrebuje. Oglas strank ne poziva in ne prosi, ampak jih vabi, to pa je tudi edini način, ki ga uporablja za poudarjanje »blagovne znamke«. Zdi se, da so prikladnost in konkurenčne cene glavne prodajne prednosti banke.

Drugi oglas za banko Frank Zotti & Co. (Slika 2) v tem slovarju (Kubelka, 1904) je najverjetneje natisnjen na zadnji platnici slovarja. Zottijeva banka, ki je v istem slovarju zastopana kar z dvema oglasoma, je bila zaradi storitev, ki jih je ponujala, v tistem času očitno zelo pomembna. V tem oglasu sta navedena dva naslova v New Yorku (v prvem oglasu je naveden le en naslov v tem mestu) ter en naslov v Pittsburghu. Po formatu sta si oglasa podobna. V drugem oglasu je v primerjavi s prvim pogostejši ležeči tisk, ki pa v nobenem izmed obeh oglasov ni uporabljen po jasno razvidni logiki. Z izjemo imena banke ter naslovov banke in podružnice je v drugem oglasu za Franka Zottija z velikimi tiskanimi črkami zapisan samo naslov »ODPRAVLJANJE POPOTNIKOV NA VSE STRANI SVETA« – morda gre celo za poskus oblikovanja slogana. V štirih odstavkih, ki sledijo, je poudarek na oglaševanju kakovosti in raznolikosti storitev. Potnikom zagotavljajo prevoz z »najboljimi, najhitrejšimi, najvarnejšimi in najcenemimi parniki na svetu«. Natisnjen je seznam pristanišč v Evropi, kamor lahko potujejo njihovi potniki; kot možne destinacije poleg Evrope navajajo tudi Ameriko, Južno Afriko, Azijo in Avstralijo. Prodajajo tudi železniške vozovnice za različne destinacije v Združenih državah, Kanadi in Mehiki. V oglasu je poudarjeno, da so vozovnice za parnike in vlake pri njih za nekaj dolarjev cenejše kot pri drugih zastopnikih. Raba ležečega tiska v zadnji povedi poudarja njihovo konkurenčno prednost: *»Ne kupujte poprej listkov, predno ne znate naših cen.«*



Slika 2: Drugi oglas za banko Frank Zotti & Co. iz Kubelkovega slovarja *Slovensko-angleška slovnica, tolmač, spisovnik in navodilo za naturalizacijo*. Angleško-slovenski in slovensko-angleški slovar. *Slovenian-English grammar, interpreter, letterwriter and information on naturalization* (Kubelka, 1912b).

Poudarek na prednostih banke Frank Zotti & Co. je v tem oglasu veliko očitnejši kot v prvem oglasu, tako da je oglas po tonu bolj podoben oglasu za Medosha (gl. podpoglavje »Frank Medosh«). V oglasu ne poudarjajo samo (ugodnih) cen, ampak tudi pester nabor storitev. V zadnji povedi vrednot podjetja ne poudarjajo na enak način kot v oglasu za Medosha, vendar pa imamo to poved lahko za neke vrste slogan.

Frank Medosh

Oglas za notarja Franka Medosha iz Čikaga (Slika 3) je na koncu slovarja, takoj za kazalom (Kubelka, 1904, str. 137); možno je, da je natisnjen na notranji strani zadnje platnice. Franka Medosha lahko prištevamo k neposrednim konkurentom banke Franka Zottija. Iz oglasa je razvidno, da je Medosh uradni zastopnik petih poimensko navedenih (parobrodskih) družb in »druzih prekomorskih črt«. Temu sledi naslednji zapis v velikih tiskanih črkah, ki je podčrtan: »PAROBRODNI IN ŽELEZNIŠKI LISTKI SO DOBITI PO NAJNIŽJIH CENAH«. V nadaljevanju oglasa je navedeno, da Frank Medosh pošilja denar v staro domovino, kar opravlja »najceneje in najhitreje«. Hitro rastoči promet »mi daje priliko moje rojake CENO postreči«, zaradi česar so stranke zadovoljne, večkrat koristijo njegovo storitve in ga priporočajo drugim ljudem. Oglas se

zaključí z motom, zapisanim z velikimi tiskanimi črkami: »CENA, HITRA IN SOLIDNA POSTREŽBA JE MOJE TRGOVINSKO GESLO.«

JAVNI NOTAR TELEFON SO. CHICAGO 123.

FRANK MEDOSH
9478 EWING AVE., Cor. 95th STREET.
SO. CHICAGO ILL.

OFICIJELNI ZASTOPNIK DRUŽB:

Bremenskega Lloyd'a
 Hamburg-America Line
 Compagnie Generale Transatlantique
 Holland-America Line
 Red Star Line

In družih prekomorskih črt.

PAROBRODNI IN ŽELEZNIŠKI LISTKI SO
 DOBITI PO NAJNIŽJIH CENAH.

Dalje pošiljam najceneje in najhitreje
DENARJE V STARO DOMOVINO
 Ogromno rastoči promet mi daje priliko moje rojake
 CENO postreči, objednem pa tudi dokazuje,
 da kdor se na mene obrne, je dobro postrežen in
 se še večkrat na mene obrne in drugim enako
 storiti svetuje.

**CENA, HITRA IN SOLIDNA POSTREŽBA JE
 MOJE TRGOVINSKO GESLO.**

Slika 3: Oglas za Franka Medosha iz prvega Kubelkovega slovarja (Kubelka, 1904).

V oglasu za Franka Medosha najdemo kar nekaj podobnosti z oglasom za banko Frank Zotti & Co. Tudi ta oglas je preprost, vključuje samo besedilo brez slik, v njem ni niti šal ali metafor niti sloganov ali besednih iger. Če primerjamo oba oglasa, opazimo, da je oglas za Franka Medosha napisan bolj prepričljivo. Zdi se, da oglas za banko Franka Zottija stranke vabi, medtem ko oglas za Franka Medosha stranke poziva. V oglasu za Franka Medosha so za poudarjanje uporabljene velike tiskane črke in podčrtovanje, na koncu oglasa pa najdemo moto. Slovenščina je mestoma okorna (npr. »listki so dobiti«, »mi daje priliko moje rojake ceno postreči«, »in drugim enako storiti svetuje«) ali pa vsebuje dobresedne prevode izrazov iz angleščine (tako je npr. *overseas lines* prevedeno kot »prekomorske črte«). Možno je, da avtor oglasa ni bil več pisne slovenščine.

Vprašamo se lahko, zakaj je Kubelka v svoj slovar iz leta 1904 vključil prav te tri oglase. Predvidevamo, da je slovar izdal v samozaložbi, zaradi česar je možno, da je sam poiskal podjetja, ki bi jih lahko oglaševal, s tem pa je znižal stroške tiskanja. Banka Frank Zotti & Co. je bila zelo dobro poznana v skupnosti priseljencev iz osrednje Evrope, ki so živeli v vzhodnem delu ZDA. Zotti je kasneje (pred letom 1908) odprl še podružnico v Čikagu (Kraljic Curran, 1989), ker se je čedalje več priseljencev

iz osrednje Evrope naselilo na območjih Čikaga in Jolieta v Illinoisu, Clevelanda v Ohiu ter v drugih krajih na ameriškem Srednjem zahodu, kjer so se zaposlili v rudnikih, železarnah in jeklarnah. Zelo verjetno so Kubelka in njegovi sodelavci poznali Zottija in njegovo podjetje. Tudi Medosh je bil v skupnosti priseljencev iz osrednje Evrope precej dobro poznan, vendar ni jasno, kako je bil povezan s Kubelko. Slednji je sicer večino življenja preživel v zvezni državi New York, vendar je imel povezave tudi s Čikagom. Leta 1905 (leto po izidu njegovega prvega slovarja) se je poročil v okrožje Cook County, katerega središče je Čikago (»Marriage licenses«, 1905, str. 10).

K. W. Kempf

Oglas v drugem Kubelkovem slovarju (Kubelka, 1912b) oglašuje K. W. Kempfa (Slika 4), glavnega zastopnika Avstro-amerikanske proge na zahodu, naveden pa je njegov naslov v Čikagu.³ Tudi v tem oglasu najdemo samo besedilo, le da ni tako zgoščeno kot v prej omenjenih oglasih (gl. podpoglavji »Frank Zotti & Co.« in »Frank Medosh«). Opisovanje storitev je zelo neposredno, cene storitev niso omenjene. Poudarek je na prikladnih in do uporabnika prijaznih storitvah: vozovnice za parnike prodajajo »v staro domovino in iz stare domovine«, prodajajo tudi vozovnice za vlake, v pisarni govorijo različne jezike, »starokrajski denar« menjajo po dnevnem tečaju.

K. W. KEMPF

Glavni zastopnik na
zapadu od Avstro
Amerikanske Proge

120 No. La Salle Street
CHICAGO, ILL.

PRODAJA parobrodne listke v staro
domovino in iz stare domovine,
kakor tudi vozne listke po raz-
ličnih železnicah.

V pisarni se govori razne jezike in če
želite kake pojasnila obrnite se zaupoo
do mene.

Menjalnica starokrajskega denarja po dnc-
vnem kurzu.

Slika 4: Oglas v drugem Kubelkovem slovarju (Kubelka, 1912b).

3 Friedemann Fegert (2021) omenja K. W. Kempfa kot čikaškega potovalnega zastopnika in bančnika.

V tem oglasu storitev ne oglašujejo na vsiljiv ali agresiven način, ampak je pristop do stranke nevsiljiv. Na koncu oglasa je omenjen starokrajski denar, iz česar lahko sklepamo, da je oglas namenjen slovenskim prišlekom v ZDA.

Frank Sakser in *Glas naroda*

V drugem Kubelkovem slovarju (Kubelka, 1912b) najdemo na isti strani oglas za Franka Sakserja, zastopnika vseh parobrodskih družb, ter oglas za dnevnik *Glas naroda* (Slika 5).

VARNOST JE ZA VSAKEGA SLOVENCA ALI NAVJATA

o priliki potovanja v staro domovino, ali ako želi
kdo koga sem vzeti, da se obrne na rojaka

FRANK SAKSER
82 CORTLANDT ST., NEW YORK, N. Y.

PODRUŽNICA :
6104 ST. CLAIR AVENUE, N.E.
CLEVELAND, O.

EDINI ZASTOPNIK VSEH PAROBRODNIH DRUŽB.
Pošilja najhitreje
DENAR V STARO DOMOVINO
C. k. poštna hranilnica izplačuje vse svote.

DOBRA ZVEZA
je najboljša in poglobitna stvar v denarnem prometu in
take dobre zveze za SLOVANSKE DEŽELE IMA LE
FRANK SAKSER

"GLAS NARODA"
edial slovenski dnevnik v Ameriki.
Glasilo slovenskih delavcev v Združenih državah
VELJA ZA CELO LETO SAMO \$1.
Vsak Slovenec bi se moral naročiti na "Glas Naroda"
Pišite na : Upravišalstvo "Glas Naroda"
82 CORTLANDT ST., NEW YORK, N. Y.

Slika 5: Oglasa za Franka Sakserja in *Glas naroda* v drugem Kubelkovem slovarju (Kubelka, 1912b).

Frank Sakser (1859–1937), ki je prišel v ZDA leta 1892, je bil časnikar, urednik, tiskarnar, založnik podjetnik in bančnik (Kristan, 2013). Ustanovil je Slovensko tiskovno društvo (Slovenic Publishing Co.) in prvi slovenski list v New Yorku, *Glas naroda* (1893–1963); obstaja torej povezava med Sakserjem in *Glasom naroda*, tako da sta oglasa nepovezana samo na prvi pogled. Sakser je izdal 47 letnikov *Slovensko-amerikanskega koledarja* (1895–1941), krajši čas pa je izdajal tudi humoristični list *Komar* (1905–1908).

Veljal je za Kubelkovega tekmeča, pri čemer je bil Kubelka precej manj uspešen, saj je izdajal list *Vestnik* le krajši čas (1908–1909), prav tako pa je izdal le nekaj števil list *Svetovna vojna/The World's War* (1914) (Arnež, b. d.).

Oglas za Franka Sakserja se začne s trditvijo da je »VAŽNO [...] ZA VSAKEGA SLOVENCA ALI HRVATA«, da se obrne na rojaka Franka Sakserja, ko želi potovati v staro domovino ali ko želi »koga sem vzeti«. Začetek, iz katerega izvemo, da je oglas namenjen Slovincem ali Hrvatom, je napisan s samimi velikimi črkami, podčrtanimi in v krepkem tisku. Avstro-Ogrska je poimenovana »stara domovina«, prislov »sem« v izrazu »sem vzeti« pa se nanaša na katerikoli kraj v ZDA. Naveden je naslov Franka Sakserja v New Yorku ter naslov podružnice na aveniji St. Clair⁴ v Clevelandu. S samimi velikimi črkami je zapisano, da je Sakser edini zastopnik vseh parobrodskih družb. Prav tako je z rabo samih velikih črk poudarjeno, da najhitreje pošilja denar v staro domovino ter da so najboljše in najpomembnejše dobre zveze v denarnem prometu, ki jih ima za slovanske dežele samo Frank Sakser.

Na isti strani kot oglas za Franka Sakserja najdemo tudi oglas za *Glas naroda* (Slika 5). Slednjega oglašujejo kot edini slovenski dnevnik v Ameriki in kot glasilo slovenskih delavcev v Združenih državah. S samimi velikimi črkami je zapisano: »VELJA ZA CELO LETO SAMO \$3«, temu pa sledi poziv, da bi morali biti na *Glas naroda* naročeni vsi Slovenci. Na koncu oglasa je naslov tega dnevnika v New Yorku. Zaključimo lahko, da je ta oglas najbolj udaren od vseh analiziranih oglasov. To lahko pripišemo dejstvu, da je imel Sakser veliko izkušenj z delom tiskarnarja in časnikarja, ki jih je začel pridobivati takoj po zaključku treh razredov gimnazije v Ljubljani – najprej v stari domovini, nato pa v ZDA (Kristan, 2013). Sakser je uporabil vsa razpoložljiva sredstva, da je potrdil superiornost in edinstvenost časopisa in storitev, ki jih je ponujal kot zastopnik parobrodskih družb.

Narodni vestnik in tiskarna Slovenske tiskovne družbe

V drugem obravnavanem Kubelkovem slovarju (Kubelka, 1912b) sta na isti strani dva oglasa, in sicer za *Narodni vestnik* in za tiskarno Slovenske tiskovne družbe, ki je ta tednik izdajala (Slika 6). Oglas za *Narodni vestnik* vsebuje vabilo bralcem, naj se naročijo nanj, navedena je naročnina za bralce v ZDA ter v Evropi in Kanadi, na koncu pa sledi geslo: »Probuja in napredek naroda. V edinosti in slogi do cilja.« Geslo poudarja vrednote in se ne nanaša neposredno na časopis oz. njegovo kakovost.

4 Ko so v 80. letih 19. stoletja prišli v Cleveland prvi Slovenci, so se naseljevali na območju sosese St. Clair–Superior, na aveniji St. Clair pa so postavili tudi osrednji slovenski narodni dom (Stanonik, 1997, str. 28). Cleveland je v obdobju pred 1. svetovno vojno postal pomembno središče ameriških Slovencev in je po številu tam živčih Slovencev postal za Trstom drugo največje slovensko mestu na svetu (Klemenčič, 2002; Pletikosič, 2006). Tako je po ljudskem štetju iz leta 1910 na območju Clevelanda živel nekaj manj kot 20.000 Slovencev, po ljudskem štetju iz leta 1920 pa dobrih 24.800 prebivalcev s slovenščino kot maternim jezikom (Klemenčič, 1995, str. 98).

Naročajte se
na največji slovenski tednik na Severozapadu

“NARODNI VESTNIK”

Katerega Izdaja:

SLOVENSKA TISKOVNA DRUŽBA
31 East Mich. St., Duluth, Minn.

Naročnina za Ameriko:

za celo leto	\$2.00
za pol leta	1.00
za četrť leta	.50

Za Evropo in Kanado:

za celo leto	\$2.50
za pol leta	1.25

Izhaja vsak četrtek na osmih stranch.
Naše geslo:
“Probuja in napredek naroda.
V edinosti in slogi do cilja.”

TISK ARNA
SLOVENSKE TISKOVNE DRUŽBE
31 East Mich. St., Duluth, Minn.

izvršuje vsa v tiskarsko stroko spadajoča dela kakor:
društvena pravila, pismeni papir, zalepke, vabila,
lepake vstopnice, račune, vizitke, cirkularje itd. ter
se priporoča c. društvam, trgovcem in obrtnikom.

Cene zmerne. Delo lično. Postrežba točna.

Pišite nam za cene in vzorce raznovrstnih tiskovin
predno naročite drugje.

Slika 6: Oglasa za *Narodni vestnik* in za tiskarno Slovenske tiskovne družbe iz drugega Kubelkovega slovarja (Kubelka, 1912b).

Narodni vestnik je začel izhajati v Duluthu v Minnesoti leta 1911, torej le leto dni pred Kubelkovim slovarjem, v katerem je natisnjen oglas zanj. Sprva je bil lokalni časopis, ki je izhajal enkrat tedensko, do leta 1914 pa je postal uradno glasilo Slovenske podporne zveze sv. Barbare v Forest Cityju v Pensilvaniji in je izhajal trikrat tedensko (gl. tudi *Narodni vestnik* = *National herald*, b. d.). V tem obdobju je v Pensilvaniji živel kar številčna slovenska skupnost. Frances Kraljic Curran (1989, str. 60–61), ki je preučevala hrvaške priseljence v ZDA, poudarja, da je bil nakup časopisa tipična značilnost Američanov, lahko pa je bil tudi dokaz, da se kupec zanima za branje oz. da je pismen.

Na isti strani kot oglas za *Narodni vestnik* najdemo tudi oglas za tiskarno Slovenske tiskovne družbe (Slika 6). V tem oglasu so navedene storitve tiskarne, kot so tiskanje društvenih pravil, pisemskega papirja, ovojnic, vabil, lepakov, vstopnic, računov, vizitk, cirkularjev ipd. Vse te tiskovine so bile pomembne pri širjenju in utrjevanju družbene mreže v skupnosti ameriških Slovencev. Temu sledi podčrtano besedilo, ki je nekakšen slogan podjetja (»Cene zmerne. Delo lično. Postrežba točna.«) in poudarja kakovost in pomen izdelka oz. storitve. Na koncu oglasa za

tiskarno pozivajo bralce, naj jim pišejo za cene in vzorce tiskovin, preden jih naročijo kje drugje.

V obeh oglasih za časopis in tiskarno so uporabili velike in male črke, krepki in ležeči tisk, celotna stran pa je črno obrobljena. Zlasti v oglasu za *Narodni vestnik* je kar precej praznega prostora, v oglasu za tiskarno pa je več besedila. V obeh oglasih so omenjene cene, moto izraža vrednote časopisa, slogan za tiskarno pa poudarja kakovost in storitve. Glede na to, da sta oba oglasa napisana v slovenščini, sta namenjena slovenskim bralcem, čeprav nikjer neposredno ne omenjata (bratov) Slovencev.

Potreba po storitvah, omenjenih v oglasih, kaže na to, da je v slovenski priseljski skupnosti potekal proces prilagajanja novemu (kulturnemu) okolju. Slovenski priseljenci se niso več ozirali le proti vzhodu, proti svoji stari domovini (pošiljanje denarja v domovino in kupovanje vozovnic za parnike), ampak so se že dobro integrirali v različnih krajih v novi domovini. Številni člani slovenske skupnosti so kupovali in brali časopise, nekateri so kupovali tudi plakate za slovenske bratske podporne organizacije, drugi pa ovojnice ali pisemski papir. Teh stvari v stari domovini najverjetneje niso kupovali.

Kubelkove publikacije

V zadnjem oglasu (Slika 7) v slovarju iz leta 1912 Kubelka oglašuje svoje publikacije. V njem je mogoče opaziti več krepkega tiska in podčrtovanja, naštetu so njegova dela, reklamnega besedila pa ni. V prvih dveh vrsticah uporabnik slovarja izve, da je to »EDINO IN NAJVEČJE založništvo slovensko-angleških knjig«, sledita Kubelkovo ime, natisnjeno s samimi velikimi črkami, ter njegov naslov v New Yorku. Za naslovom je seznam Kubelkovih knjig skupaj s cenami, iz seznama pa je razvidno, da je Kubelka poleg slovarjev izdal tudi priročnik z uporabnimi pogovarjalnimi stalnimi izrazi (Kubelka, 1912a), ki so ga delili tudi priseljencem na otoku Ellis v New Yorku, ter slovnico, ki jo je vključil v delo z naslovom *Slovensko-angleška slovnica in tolmač, Angleško-slovenski slovar*. Besedilo v zadnjih dveh vrsticah je natisnjeno krepko in podčrtano, izpostavlja pa dejstvo, da ima Kubelka »največjo zalogo raznih slovenskih knjig«, ter da lahko tisti, ki jih zanimajo cene knjig (najverjetneje knjig, katerih avtor ni Kubelka), pisno zaprosijo za cenik. Oglas se zaključuje s klicajem, kar je nenavadno v primerjavi z drugimi oglasi v slovarjih, ki smo jih preučili, kjer klicajev ni.

Kubelkov podjetniški duh je viden tako v tem oglasu kot tudi v njegovem slovenskem predgovoru v slovarju iz leta 1912, v katerem je zapisal: »Knjiga je tako urejena, da zadostuje vsaki potrebi in vsak, kateri jo bode rabil, bode gotovo zadovoljen ž njo« (Kubelka, 1912b, str. 9). Kubelka se je v desetih letih življenja v ZDA že zelo dobro prilagodil kulturnemu okolju v novi domovini in tudi načinu oglaševanja, značilnemu za ZDA v tistem obdobju.

EDINO IN NAJVEČJE
založništvo slovensko-angleških knjig

V. J. KUBELKA
 538 W. 145th ST., NEW YORK, N. Y.

IMA V ZALOGI:

Veliki Slovensko-Angleški Tolmač
 Knjiga obsega nad 430 strani in velja v
 platno verana\$2.00

Slovensko-Angleški in
Angleško-Slovenski Slovar
 Največji slovar v teh dveh jezilih. Trdo
 v platno veran (220 strani) velja\$1.50

Slovensko-Angleška Slovnica in
Tolmač, Angleško-Slovenski Slovar
 Trdo v platno verana (200 stranl) velja \$1.00

Rečnik slovenskega in angleškega
jezika.....\$0.60

Slovensko-Angleški Razgovori
 Knjiga ima 48 strani in velja mehko
 verana\$0.25

Največja zaloga raznih slovenskih knjig.

Pišite po cenik!

Slika 7: Oglas za Kubelkovo založništvo iz drugega Kubelkovega slovarja (Kubelka, 1912b).

Avstro-amerikanska parobrodarska proga

Na koncu drugega Kubelkovega slovarja (Kubelka, 1912b) sta dva oglasa za Avstro-amerikansko parobrodarsko progo.⁵ V prvem (Slika 8) je besedilo napisano zelo zgoščeno in neposredno, v njem ni nobenih metafor, sloganov ali motov. Besedilo oglasa je razdeljeno na pet odstavkov, na koncu oglasa pa sta navedena ime zastopnika (Phelps Bros. & Co.) in njegov naslov v New Yorku.

⁵ Avstro-amerikanska parobrodarska proga je bila ustanovljena leta 1895 s sedežem v Trstu. Sprva je bila namenjena prevozu tovora med Avstro-Ogrsko in Severno Ameriko. Leta 1904 se je podjetje odločilo, da se bo začelo ukvarjati s prevozi potnikov v ZDA, da bi si zagotovilo svoj delež na čedalje donosnejšem trgu prevozov izseljencev iz Evrope v ZDA. Prva ladja z izseljenci je iz Trsta v New York odplula 9. 6. 1904. Leta 1904 je podjetje prepeljalo 4.224 potnikov, to število pa je do leta 1912 naraslo že na 10.134. Fundacija Ellis Island ima zabeleženih 28 ladij v lasti Avstro-amerikanske parobrodarske proge (Richter, b. d.).

**Avstro-Amerikanska
Parobrodarska
Proga**

Najboljša in najcenejša parobrodarska proga za Slovence in Slovane. Ravna plovitba iz Trsta. Brzi poštni parobrodi na dva vijaka :

Kaiser Franz Joseph I., Martha Washington, Laura, Alice, Argentina, Oceania, Columbia in Atlanta. Drugi novi parobrodi, koi bodo vozili 20 milj na uro se zdaj gradijo.

Vsi parobrodi imajo brezžični brzojav in električno razsvetljavo.

Parobrodi so moderno urejeni. Domača hrana z vinom. Mornarji in zdravnik govore slovenski.

Za vse podrobnosti, cene in prevozne karte se obrnite ali na nas ali na naše pooblašene zastopnike po Ameriki.

PHELPS BROS. & CO.
GENERAL AGENTS
2 WASHINGTON ST. : : NEW YORK. N. Y.

Slika 8: Prvi oglas za Avstro-Amerikansko progo iz drugega Kubelkovega slovarja (Kubelka, 1912b).

Podobno kot v prejšnjih tudi v tem oglasu ni ležečega tiska, velikih tiskanih črk ali podčrtovanja. Tu prvič opazimo rabo krepkega tiska pri navajanju imen parnikov. V oglasu je zapisano, da je »Avstro-amerikanska parobrodarska proga najboljša in najcenejša parobrodarska proga za Slovence in Slovane«. Oglas je bil najverjetneje namenjen Slovencem, saj je napisan v slovenščini; poleg tega je v njem omenjeno, da parniki plujejo direktno iz Trsta. Oglas je bil namenjen predvsem Slovencem v domovini, ki so želeli potovati v ZDA, glede na to, da je bil natisnjen v slovarju, ki je bil izdan v ZDA, pa tudi slovenskim priseljencem v ZDA, ki so kupovali vozovnice za sorodnike v domovini.

To je prvi oglas, v katerem sta omenjeni tehnologija in sodobnost. V oglasu je podatek, da imajo parniki dva vijaka, gradijo pa se novi parniki, ki bodo potovali s hitrostjo 20 milj na uro. Bralci izvejo, da imajo vsi parniki brezžični brzojav in električno razsvetljavo. Prav tako je poudarjeno, da so udobni, da na njih strežejo domačo hrano z vinom ter da mornarji in zdravnik govorijo slovensko. Od preučevanih oglasov je ta edini, v katerem poudarek ni na ceni, omenjeno pa je, da je to najcenejša parobrodarska proga.

Zadnji oglas v Kubelkovem slovarju iz leta 1912 je natisnjen na zadnji platnici in je edini od preučevanih oglasov, ki vključuje sliko (Slika 9). Risbi parnika Avstro-amerikanske proge sledi poimenski seznam dvanajstih parnikov – pri novem parniku in še sedmih drugih je navedeno, da imajo dva vijaka, navedena je tudi njihova tonaža, ki je pri zadnjih štirih parnikih v oglasu ni. Novi parnik je poimenovan po avstro-ogrskem cesarju Francu Jožefu,⁶ eden izmed preostalih parnikov pa po Zofiji Hohenberški, soprogi avstro-ogrskega prestolonaslednika Franca Ferdinanda. V tem oglasu ni nobenega naslova, prav tako ni omenjeno, da se karkoli prodaja – sklepamo lahko, da je bilo potovanje čez Atlantik za izseljence v ZDA izredno pomembno, zaradi česar te storitve ni bilo treba posebej oglaševati oz. prodajati. Ciljna publika ni nikjer omenjena, ker pa je oglas napisan v slovenščini, je jasno, da je bil namenjen Slovencem. Tako sestavljen oglas bi bil povsem primeren za katerokoli skupino izseljencev v tistem obdobju, izpostavlja pa izreden pomen prekoceanskega prevoza za izseljence v tistem času.



Parobrodi Avstro-Amerikanske
Proge:

Novi ekspresni parobrod (na dva vijaka):	
“Kaiser Franz Joseph I”	18,000 ton
Drugi brzi parobrodi (na dva vijaka):	
“Martha Washington”	14,500 “
“Leura”	10,500 “
“Alice”	10,500 “
“Argentina”	10,000 “
“Oceania”	10,000 “
“Atlanta”	10,300 “
“Columbia”	10,000 “
in	
“Sofia Hohenberg,”	“Francesca,”
“Georgia”	“Eugenia,”

Slika 9: Drugi oglas za Avstro-amerikansko progo iz drugega Kubelkovega slovarja (Kubelka, 1912b).

6 Največji parnik Avstro-amerikanske parobrodarske proge je bil Kaiser Franz Josef I. Dokončan je bil leta 1912 in je plul v New York in v Južno Ameriko (Richter, b. d.).

RAZPRAVA IN ZAKLJUČNE MISLI

Dandanes je oglaševanje med najpomembnejšimi dejavniki, ki oblikujejo in odražajo življenje določene skupnosti. Oglasi prepričujejo ljudi, naj kupijo določen izdelek ali storitev, poleg tega pa vplivajo tako na splošno kulturo skupnosti kot tudi na oblikovanje posameznika (Vestergaard & Schrøder, 1985; Cook, 1992). Oglasi v slovarjih, namenjenih slovenskim priseljencem v ZDA na začetku 20. stoletja, nam nudijo vpogled v potrebe, ki so jih ti imeli v novi domovini, ter spodbujajo njihove težnje po vključevanju v ameriško družbo.

Rdeča nit vseh treh oglasov v prvem obravnavanem Kubelkovem slovarju (za banko Frank Zotti & Co. in za notarja Franka Medosha; Kubelka, 1904) ter dveh oglasov v drugem (za K. W. Kempfa in Franka Sakserja; Kubelka, 1912b) sta nakup vozovnic za parnike in vlake ter pošiljanje denarja v staro domovino. Kubelka je svoj prvi slovar iz leta 1904 izdal samo dve leti po prihodu v ZDA in so se mu te storitve očitno zdele izredno pomembne za slovenske priseljence v ZDA v prvih letih 20. stoletja. V njegovem slovarju iz leta 1912 sta poleg dveh oglasov za prekoceanškega prevoznika Avstro-amerikanska parobrodarska proga še oglasa za časopisa *Narodni vestnik* in *Glas naroda* ter za tiskarno Slovenske tiskovne družbe. Povsem razumljivo je, da v slovarju iz leta 1904 še ni bilo mogoče oglaševati Avstro-amerikanske parobrodarske proge, ker se je podjetje tistega leta šele začelo ukvarjati s prevozi potnikov iz Trsta v New York, leta 1912 pa je bila ta dejavnost za podjetje že zelo pomembna (gl. opombo št. 5). Oglasi v drugem Kubelkovem slovarju že kažejo na drugačne potrebe slovenske skupnosti, ki je bila čedalje bolj vpeta v novo okolje, podobno kot Kubelka po desetih letih življenja v ZDA.

Analizirani oglasi ne odražajo zgolj ekonomskih potreb slovenskih priseljencev v ZDA, temveč tudi prispevajo k simbolnemu vzpostavljanju priseljske skupnosti. To je razvidno iz več ponavljajočih se elementov: eksplicitnega nagovarjanja »Slovencev« oziroma »bratov«, rabe izraza »stara domovina«, poudarjanja slovenskega jezika v poslovanju ter izpostavljanja vrednot, kot sta sloga in narodna enotnost. S tem oglasi vzpostavljajo simbolne meje (prim. Barth, 1969/1998), ki slovenske priseljence ločujejo od širšega ameriškega okolja, hkrati pa jih umeščajo v transnacionalni prostor med staro in novo domovino.

Pri tem ne predpostavljamo, da raba slovenščine sama po sebi pomeni individualno občutenje identitete. Jezik v oglasih razumemo kot diskurzivno sredstvo, ki ustvarja okvir pripadnosti in predstavo o obstoju slovenske skupnosti v ZDA. Oglasi tako ne dokazujejo identitete posameznikov, temveč prispevajo k njenemu javnemu in simbolnemu vzpostavljanju.

Morda se zdi, da oglasi, ki smo jih analizirali, predstavljajo zelo ozko realnost, vendar je bila za priseljence realnost tistega časa natančno tako ozka. Zaposleni so bili predvsem v rudnikih in jeklarnah, v manjšem številu so opravljali storitve za priseljsko skupnost kot obrtniki (npr. čevljarji) ali računovodje. Plačevali so članarino bratskim podpornim organizacijam, ki so imele vlogo zavarovalniških družb in

so predstavljale edino varnostno mrežo, saj ZDA tedaj še niso poznale nobene oblike zavarovanja. Bratske podporne organizacije so skrbele za zavarovanje delavcev v primeru nesreč pri delu ali bolezni, poleg tega pa so opravljale tudi vlogo kulturnega in političnega združevalca slovenskih priseljencev (Klemenčič, 2001). S prihodki so podpirale izdajanje raznih listov in revij, na katere so bili priseljenci naročeni in so jih brali. Posebej zgovorna je prepletenost ekonomskih, informacijskih in skupnostnih funkcij: založnik ali urednik časopisa je bil lahko tudi bankir, ki je priseljencem pomagal pri pošiljanju denarja v staro domovino; isti bankir je prodajal tudi vozovnice za parnike in vlake, te vozovnice pa so priseljenci kupovali za družinske člane, ki so potovali v ZDA. Če priseljenci teh vozovnic niso kupili pri bankirju (npr. Franku Zottiju), so jih pri notarju (npr. Franku Medoshu). Časopis, ki je vključeval oglase, podobne oglasom v analiziranih slovarjih, je imel močan vpliv na oblikovanje političnih pogledov priseljencev. Založnik časopisa je bil pogosto tudi tiskar, ki je tiskal slovarje in druge knjige v materinščini priseljencev. Včasih je imel časopis tudi knjigarno ali skladišče za knjige in je v slovarju oglaševal tako knjigarno kot tudi seznam knjig, ki jih je natisnil. Založnik oz. tiskarnar ni tiskal samo knjig, ampak tudi plakate za cerkev ali bratske organizacije priseljencev, pa tudi ovojnice, vstopnice, vabila in številne druge tiskovine, ki so jih priseljenci potrebovali v vsakdanjem življenju. Preučevani oglasi pokrivajo le ozek segment medsebojno povezanih oglasov, ki skupaj zajemajo široko paleto dejavnosti priseljencev v novi domovini. Takšna struktura oglasov kaže na gosto institucionalno mrežo, ki je omogočala ohranjanje etnične kohezije v procesu akulturacije. Oglasi tako delujejo kot posredniki med ekonomskim preživetjem in simbolnim utrjevanjem skupnosti.

Omeniti velja tudi čas in kraj nastanka oglasov. V prispevku smo preučevali samo oglase v dvojezičnih slovarjih za slovenske priseljence v ZDA, ki so izšli konec 19. in v začetku 20. stoletja, ne pa tudi oglasov v drugih knjigah oz. priročnikih za priseljence. Tako je Kubelka v svoj priročnik z uporabnimi pogovarjalnimi stalnimi izrazi (Kubelka, 1912a), ki je bil namenjen priseljencem za lažjo komunikacijo, ker vključuje številne koristne stalne večbesedne izraze iz vsakdanjega življenja, vključil dva oglasa za Avstro-amerikansko parobrodarsko progo. Oglas za to družbo je na zadnjih platnicah Kubelkovega priročnika (Kubelka, 1912a) in slovarja (Kubelka, 1912b) popolnoma enak, drugi oglas v priročniku pa je vsebinsko podoben oglasu v slovarju. Po drugi strani pa oglasov ni v Jeramovi slovenski slovnici iz leta 1895 (Jeram, 1895), ni pa jih niti v Košutnikovem dvorelacijskem slovenskem in angleškem slovarju (Košutnik, 1912), ki je izšel v Ljubljani leta 1912 (v slednjem najdemo samo seznam knjig Antona Turka, založnika, ki je izdal tudi Košutnikov slovar). Preučili smo še nekaj slovarjev, ki so izšli v Kanadi v približno enakem obdobju, vendar v njih ni nobenih oglasov. Zdi se, da so se oglasi pojavljali od začetka 20. stoletja do prve svetovne vojne, treba pa bi bilo še podrobneje preučiti, ali so se pojavljali samo v knjigah za priseljence, ki so izšle v ZDA.

Izobrazbena stopnja ciljne publike je bila nizka, saj so se slovenski priseljenci v ZDA v času pred 1. svetovno vojno zaposlovali predvsem kot delavci, slovenski

srednji sloj (npr. lastniki živilskih trgovin, mesarji, gostilničarji in obrtniki, predvsem čevljarji in krojači) pa je začel nastajati šele v 20. letih 20. stoletja. Le redkim se je že v prvi generaciji uspelo prebiti v akademske poklice – takšni primeri so bili zdravnik Frank (Javh-)Kern, ki je leta 1919 objavil slovar *A Complete Pronouncing Dictionary of the English and Slovene Languages for General Use* (Kern, 1919), ter pravnika Varoslav Grill in John Mihelich, ki sta se ukvarjala tudi s politiko (Stanonik, 1997, str. 28). To je lahko eden od razlogov za to, da so bili oglasi v preučevanih slovarjih preprosti in da niso vključevali besednih iger, aluzij ali figurativnega izražanja. Tehnike, ki se uporabljajo v sodobnem, veliko bolj razvitem oglaševanju, v času nastanka preučevanih slovarjev ne bi bile učinkovite, ker bi bili takšni oglasi priseljencem le težko razumljivi ali celo nerazumljivi. Kljub temu pa so ti oglasi ter dejavnosti, ki so bile v njih oglaševane, vsaj malo prispevali k oblikovanju ameriške identitete priseljencev.

Oglasi v obravnavanih slovarjih niso zgolj spremljevalni komercialni elementi, temveč predstavljajo pomemben del komunikacijskega prostora slovensko govorečih priseljencev v ZDA na začetku 20. stoletja. Čeprav so bili prvenstveno namenjeni prodaji storitev, so s svojo jezikovno izbiro, z načinom nagovarjanja ter s ponavljajočim se poudarjanjem skupnosti soustvarjali imaginarij slovenske skupnosti v izseljenstvu. Njihova vloga pri oblikovanju identitete je posredna: ne oblikujejo individualne identifikacije, temveč utrjujejo simbolne koordinate, znotraj katerih se lahko identiteta potrjuje in preoblikuje. V tem smislu oglasi v slovarjih niso le odraz prilagajanja novemu kulturnemu okolju, temveč tudi aktivni element diskurzivnega konstruiranja priseljske skupnosti.

ZAHVALE IN DRUGI PODATKI

Projekt, katerega izsledki so predstavljeni v pričujočem članku, je finančno podprla Javna agencija za znanstvenoraziskovalno in inovacijsko dejavnost Republike Slovenije, in sicer v okviru bilateralnih projektov »Stare besede, nove besede, novi svet: Življenje slovenskih leksikografov – priseljencev v ZDA« (BI-US/22-24-030) in »Slovarji in izkušnje Slovencev – emigrantov v Združenih državah Amerike (konec 19. in začetek 20. stoletja)« (BI-US/22-24-042) ter programske skupine »Teoretične in aplikativne raziskave jezikov: kontrastivni, sinhroni in diahroni vidiki« (P6-0218).

IZJAVA O DOSTOPNOSTI RAZISKOVALNIH PODATKOV

Viri za raziskovalne podatke so navedeni na seznamu virov in literature.

VIRI IN LITERATURA

- Amerikanski Slovenec*. (1912, 23. avgust). 21(38). Edinost Publishing. <http://www.dlib.si/?URN=URN:NBN:SI:DOC-IHI2KR0L>
- Ameriška domovina*. (1919, 5. december). 22(141). J. Debevec. <http://www.dlib.si/?URN=URN:NBN:SI:DOC-PQH4XRJI>
- Ameriška domovina*. (1921, 15. april). 24(44). J. Debevec. <http://www.dlib.si/?URN=URN:NBN:SI:DOC-ED3JVZSY>
- Arnež, J. (b. d.). *Slovenska župnija sv. Ciril v New Yorku*. http://www.slovenskacerkev-ny.si/uploads/1/5/0/8/15080858/zgodovinahistory_80_obleznica.pdf
- Bankrupt banker held for larceny. (1908, 18. julij). *The New York Times*. https://timesmachine.nytimes.com/timesmachine/1908/07/18/104740378.pdf?pdf_redirect=true&ip=0
- Barth, F. (1969/1998). Introduction. V F. Barth (ur.), *Ethnic groups and boundaries: The social organization of culture difference* (str. 9–38). Waveland Press.
- Bhugra, D. (2004). Migration, distress and cultural identity. *British Medical Bulletin*, 69, 129–141. <https://www.doi.org/10.1093/bmb/ldh007>
- Blaj Hribar, N. (2016). »On bo seveda prihodnjič inseriral«: Oglaševanje v Slovenskem narodu in Slovencu na prelomu 19. in 20. stoletja. V A. Studen (ur.), *Od prvih oglasov do interneta. K zgodovini oglaševanja na Slovenskem* (str. 59–71). Zbirka Vpogledi. Inštitut za novejšo zgodovino. https://www.sistory.si/media/legacy/publikacije/43001-44000/43085/vpogledi_13-splet.pdf
- Cook, G. (1992). *The discourse of advertising*. Routledge.
- Dziemianko, A. (2020). Smart advertising and online dictionary usefulness. *International Journal of Lexicography*, 33(4), 377–403. <https://www.doi.org/10.1093/ijl/ecaa017>
- Fegert, F. (2021). »You cannot imagine what it is like in America«: Emigration from the Bavarian forest in Germany to the United States from 1841 to 1931. Lichtland.
- Fjeld, R. V. (2012). Et forsømt kapittel i leksikografiens historie: Leachman's Norsk-Engelsk Lomme-Ordbog/Norwegian-English pocket dictionary. *Norsk Lingvistisk Tidsskrift*, 30(2), 151–164. <https://ojs.novus.no/index.php/NLT/article/view/205>
- Gibson, M. A. (2001). Immigrant adaptation and patterns of acculturation. *Human Development*, 44, 19–23.
- Granatir Alexander, J. (2009). *Daily life in immigrant America, 1870–1920: How the second great wave of immigrants made their way in America*. Ivan R. Dee.
- Grønvik, O. (2016). The lexicography of Norwegian. V P. Hanks & G.-M. de Schryver (ur.), *International handbook of modern lexis and lexicography* (str. 1–34). Springer-Verlag. https://doi.org/10.1007/978-3-642-45369-4_44-1
- Hancher, M. (2015). Advertisements in dictionaries. V *Conference Handbook: DSNA-20 & SHEL-9 dual conference* (str. 49). University of British Columbia. https://events.arts.ubc.ca/dsna-20&shel-9/lib/pdf/DSNA-SHEL_handbook.pdf

- Jahresbericht des k. k. Staats – Obergymnasiums* (1893). K. k. Staats – Obergymnasiums. <http://www.dlib.si/?URN=URN:NBN:SI:DOC-BBTMUOYZ>
- Jeram, P. J. (1895). *Slovensko-angleška slovnica*. Amerikanski Slovenec.
- Kadak, P. K. (1905a). *Praktičný slovensko-anglický tlumač. The practical Slovak American interpreter*. Slovák v Amerike.
- Kadak, P. K. (1905b). *Praktičný slovensko-anglický tlumač. The practical Slovak American interpreter*. G. Klein & Son.
- Kavanagh, K. (2000). Words in a cultural context? *Lexikos*, 10, 99–118. <https://doi.org/10.5788/10-0-889>
- Kern, F. J. (1919). *A complete pronouncing dictionary of the English and Slovene languages for general use. Popoln angleško-slovenski besednjak z angleško izgovarjavo*. Tisk ameriške domovine.
- Klemenčič, M. (1995). *Slovenes of Cleveland. The creation of a new nation and a new world community Slovenia and the Slovenes of Cleveland Ohio*. Dolenjska založba.
- Klemenčič, M. (2001). Slovenske naselbine v Združenih državah Amerike. *Drevesa*, 8(3), 18–23.
- Klemenčič, M. (2002). Slovenes in Cleveland. V D. C. Hammack, D. L. Grabowski & J. J. Grabowski (ur.), *Identity, conflict, & cooperation: Central Europeans in Cleveland, 1850–1930* (str. 307–344). The Western Reserve Historical Society.
- Košutnik, S. (1912). *Ročni slovensko-angleški in angleško-slovenski slovar: Zlasti namenjen izseljencem v Ameriko*. Anton Turk.
- Kraljic Curran, F. (1989). Ethnic entrepreneur: Frank Zotti (1872–1947): A Croatian immigrant success story. *Migracijske i etničke teme*, 5(1), 59–66. <https://hrcak.srce.hr/127985>
- Kristan, C. A. (2013). Sakser, Frank (1859–1937). V *Slovenska biografija*. ZRC SAZU. <http://www.slovenska-biografija.si/oseba/sbi532721/#slovenski-biografski-leksikon> Prvotno objavljeno v A. Gspan et al. (ur.). (1960). *Slovenski biografski leksikon: zv. 9, Raab–Schmid*. SAZU.
- Kubelka, V. J. (1904). *Slovenian-English pocket dictionary to facilitate the study of both languages. Slovensko-angleški žepni rečnik v olajšavo naučenja obeh jezikov*. New York. <https://babel.hathitrust.org/cgi/pt?id=loc.ark:/13960/t4qj8p026&view=1up&seq>
- Kubelka, V. J. (1912a). *Slovensko-angleški razgovori. Slovenian-English interpreter*. Press of Stettiner Bros. <https://hdl.handle.net/2027/nyp.33433021125889>
- Kubelka, V. J. (1912b). *Slovensko-angleška slovnica, tolmač, spisovnik in navodilo za naturalizacijo. Angleško-slovenski in slovensko-angleški slovar. Slovenian-English grammar, interpreter, letterwriter and information on naturalization. English-Slovenian and Slovenian-English dictionary*. Prva izdaja/First edition. Viktor J. Kubelka.
- Marriage licenses. (1905, 26. september). *The Inter Ocean (Chicago)*. str. 10. <https://www.familysearch.org/ark:/61903/1:1:N7D4-DWG>

- McConchie, R. W. (2024). Dictionary preterition: Promotional dictionaries to serve the greater good. *Dictionaries*, 45(1), 71–103.
- Narodni vestnik = National herald. (b. d.). Library of Congress. <https://chroniclingamerica.loc.gov/lccn/sn84024585>
- Perruchoud, R. (ur.). (2004). *International migration law: Glossary on migration*. International Organization for Migration. https://publications.iom.int/system/files/pdf/iml_1_en.pdf
- Pletikosić, I. (2006). Revizije popisa prebivalstva Trsta iz leta 1910. *Annales. Ser. hist. sociol.*, 16(2), 477–482.
- Pogačar, T. (2023). Literarni prevodi spodbujajo izobraževanje skupnosti priseljencev: časopis Prosveta in primerjave s češko-ameriškimi časopisi. *Dve domovini / Two Homelands*, 57, 91–108. <https://doi.org/10.3986/dd.2023.1.05>
- Pope, D. (2003). *Making sense of advertisements*. History Matters: The U.S. Survey Course on the Web.
- Richter, H. (b. d.). *Austro-Americana line*. The Austrian press and information service in the United States, Embassy of Austria. <https://www.austria.org/austro-america>
- Schwartz, S. J., Montgomery, M. J., & Briones, E. (2006). The role of identity in acculturation among immigrant people. *Human Development*, 49(1), 1–30. <https://www.jstor.org/stable/10.2307/26763865>
- Slovenec: političen list za slovenski narod*. (1911, 31. maj). 39(124). Ljudska tiskarna. <https://www.dlib.si/details/URN:NBN:SI:doc-EAUX7MOE>
- Slovenec: političen list za slovenski narod*. (1935, 13. avgust). 58(184a). Ljudska tiskarna. <http://www.dlib.si/?URN=URN:NBN:SI:DOC-K556PW8G>
- Slovenski narod*. (1903, 16. junij). 36(136). Narodna tiskarna. <http://www.dlib.si/?URN=URN:NBN:SI:DOC-7OKM5NQF>
- Stanonik, J. (1997). Slovenci v Clevelandu. *Zgodovinski časopis*, 51, 21–32. <http://www.dlib.si/?URN=URN:NBN:SI:doc-FPO9TPUY>
- Taschen-Wörterbuch Für Deutsch Sprechende Immigranten* (b. d.). Percival Publishing Co. Pty Ltd. <https://www.germanaustralia.com/d/d-diction60.htm>
- Vacalopoulou, A., Giouli, V., Giagkou, M., & Efthimiou, E. (2011). Online dictionaries for immigrants in Greece: Overcoming the communication barriers. V I. Kosem & K. Kosem (ur.), *Electronic lexicography in the 21st century: New applications for new users, Proceedings of eLex 2011, 10–12 November 2011, Bled, Slovenia* (str. 274–279). Trojina, Institute for Applied Slovene Studies.
- Vestergaard, T., & Schrøder, K. (1985). *The language of advertising*. Basil Blackwell Publisher Ltd.
- Vrbinc, M., Farina, D. M. T. Cr., & Vrbinc, A. (2024). Oris slovarjev in priročnikov za učenje angleščine slovenskih izseljencev v ZDA v obdobju 1895–1919. *Dve domovini / Two Homelands*, 59, 179–202. <https://doi.org/10.3986/2024.1.10>
- Vrbinc, A., Vrbinc, M., & Farina, D. M. T. Cr. (2025). "For the benefit of my countrymen": Cultural context and lemma choice in early 20th-century dictionaries for immigrants. *International Journal of Lexicography*, 38(3), 238–256.

- Williamson, J. (1985). *Decoding advertisements: Ideology and meaning in advertising*. Boyars.
- Xue, M., & Tarp, S. (2018). Towards Chinese learner's dictionaries for foreigners living in China: Some problems related to lemma selection. *Lexikos*, 28(1), 384–404.
- Zotti charges conspiracy. (1908, 19. julij). *The New York Times*. https://timesmachine.nytimes.com/timesmachine/1908/07/19/104741018.pdf?pdf_redirect=true&ip=0
- Župnija Sv. Petra v Ljubljani. (1877–1884). *Rojstna in krstna knjiga (Geburts- und Tauf-Buch)* (Signatura 03985). Nadškofijski arhiv Ljubljana. <https://data.matricula-online.eu/sl/slovenia/ljubljana/ljubljana-sv-peter/03985/?pg=110>

SUMMARY

ADVERTISEMENTS IN DICTIONARIES FOR SLOVENIAN IMMIGRANTS TO THE UNITED STATES AT THE BEGINNING OF THE TWENTIETH CENTURY

Alenka Vrbinc, Donna M. T. Cr. Farina, Marjeta Vrbinc

Immigrant dictionaries are reference works designed for immigrants in their new cultural context. The immigrant dictionaries discussed here are bilingual, but what distinguishes them from learner's dictionaries (Xue & Tarp, 2018) is the tailored cultural information they contain. Immigrant dictionaries may include concepts that do not exist in the immigrant's home culture, information useful for official and unofficial social settings, meanings that help convey attitudes or social norms, and proper nouns denoting geographical entities, official offices, or organizations. In short, the selection criteria for lemmas differ between immigrant dictionaries and other learner resources.

One further type of information should be added to this list: information conveyed through advertisements. Like other culture-specific information that can be helpful to immigrants, advertisements address immigrants' new current reality while also influencing the formation of their new cultural identity.

To the authors' knowledge, no studies to date have analyzed advertisements in immigrant dictionaries. Such analysis is a necessary step if the field of lexicography is to develop a theoretical understanding of the immigrant dictionary genre. This article investigates the role of advertisements in immigrant dictionaries published in the United States in the early twentieth century.

Building on previous studies (Vrbinc et al., 2024), the authors examine advertisements in two dictionaries for the Slovenian–English language pair by the same author, Viktor Kubelka. Between 1880 and 1918, more than 3.9 million people from Austria-Hungary emigrated to the United States (Granatir Alexander, 2009), many of whom were Slovenes; in this context, bilingual manuals, including dictionaries, were in demand among immigrants.

Advertisements appear only rarely in the immigrant dictionaries from this period. When they do appear, they promote the services of banks and notaries, which sold steamship and train tickets and sent money to immigrants' homeland, as well as newspapers in immigrants' mother tongue, publishing houses, and steamship companies. Generally speaking, they reflect immigrants' processes of acculturation. As discussed in this article, the advertisements found in some US immigrant dictionaries from the early 1900s are targeted to users' interests in ways comparable to the personalization found in modern online dictionary advertising (Dziemianko, 2020).

ALTERNACIJA KODOV V PROZNIH DELIH GORANA VOJNOVIĆA

Mateja Curk¹

COBISS 1.01

IZVLEČEK

Alternacija kodov v proznih delih Gorana Vojnovića

Avtorica v prispevku analizira izbor proznih del Gorana Vojnovića, enega izmed avtorjev mlajše generacije, ki piše v več jezikovnih kodih. Intimne zgodbe o življenju potomcev priseljencev z območja nekdanje Jugoslavije pripovedujeta Marko Đorđić in Vladan Borojević – dvojezična protagonista del *Čefurji raus!* in *Jugoslavija, moja dežela*. S primeri alternacije kodov v različnih govornih položajih avtorica ponazori na specifičen način ustvarjen jezik skupnosti priseljencev in njihovih potomcev. Ob primerih rabe različnih jezikovnih kodov raziskuje ideološke funkcije jezika in literarizacije različnih pojavnih oblik večjezičnosti.

KLJUČNE BESEDE: literarni diskurz, večjezičnost, migrantska skupnost, diskurz nostalgije, diskurz subkulture

ABSTRACT

Code Alternation in Goran Vojnović's Prose Texts

This article analyzes selected prose by Goran Vojnović, a younger-generation author who writes in multiple linguistic codes. Marko Đorđić and Vladan Borojević, the bilingual protagonists of *Čefurji raus!* (*Southern Scum, Go Home!*) and *Jugoslavija, moja dežela* (*Yugoslavia, My Fatherland*), tell intimate stories about the lives of the descendants of immigrants from the former Yugoslavia. Through examples of code alternation in different speech situations, the article illustrates the specific literary construction of the language of the immigrant community and its descendants and explores the ideological functions of language and literary representations of various forms of multilingualism.

KEYWORDS: literary discourse, multilingualism, migrant community, discourse of nostalgia, discourse of subculture

¹ dr. znanosti s področja jezikoslovja; mcurk3@gmail.com; ORCID <https://orcid.org/0009-0006-5078-2006>

UVOD

V sodobni literaturi so opazna posamezna besedila, v katerih se poleg slovenskega pojavlja tudi več drugih jezikov z območja nekdanje Jugoslavije. Potem ko so bile sociolingvistične okoliščine jezikov, ki so nastali po razpadu srbohrvaškega jezika in sobivajo v slovenskem prostoru, že raziskane (Požgaj Hadži & Balažic Bulc, 2022), v prispevku raziskujemo, kaj v sodobni literaturi bistveno definira jezik protagonistov, ki pripovedujejo o manjšinski etnični skupnosti, kot se je formirala po priseljevanju iz držav nekdanje Jugoslavije. Ker je jezik temeljni simbol etnične identitete (Balažic Bulc & Požgaj Hadži, 2019, str. 49) in hkrati temeljno sredstvo za pripovedovanje zgodb, je raziskava osredotočena na odkrivanje metapragmatičnega pomena jezikovnih značilnosti besedil.

V prispevku je analiziran jezik proznih del Čefurji raus! (2008) in Jugoslavija, moja dežela (2012), v katerih avtor mlajše generacije Goran Vojnović¹ predstavlja intimne življenjske zgodbe potomcev prve generacije priseljencev, ki so se v Slovenijo priselili iz držav nekdanje Jugoslavije. Pripovedi obeh proznih del na specifičen način zaznamujeta izbira jezika in prisotnost več jezikovnih kodov v literarnih govoricah² dvojezičnih protagonistov mlajše generacije. Poleg slovenskega jezika so namreč v govorici potomcev državljanov nekdanje Jugoslavije, Marka Đorđića in Vladana Borojevića, ter v govoricah drugih literarnih oseb iz Vojnovićevih proznih del različno rabljene leksikalne in skladenjske prvine maternih jezikov priseljencev iz nekdanje Jugoslavije. V analizi literarnih govoric, ki pripovedujejo zgodbe o vsakdanjem življenju skupnosti priseljencev, so ponazorjene specifične značilnosti pojavnih oblik alternacije kodov v literarnem diskurzu ter govorni položaji, v katerih se pojavljajo prvine različnih maternih jezikov z območja nekdanje Jugoslavije (gl. tudi Curk, 2016).

DOSEDANJE RAZISKAVE IN KLJUČNA TEORETSKA IZHODIŠČA

Dosedanje raziskave so »različne pojave soobstoja elementov obeh jezikov v diskurzu dvojezičnih govorcev« (Petrović, 2006, str. 57), kot se pojavljajo tudi v pisanju Gorana Vojnovića, razlagale kot alternacijo kodov. Zato bodo naprej povzeta

1 Poleg omenjenih je Goran Vojnović avtor še dveh romanov, in sicer *Figa* (2016) in *Đorđić se vrača* (2021). Med Vojnovićevimi neliterarnimi deli omenimo zbirko esejev *Zbiralec strahov* (2022), kjer med drugim piše tudi o jeziku: »A v otroštvu se je vse, kar je bilo najbolj moje, nahajalo v nekem drugem jeziku, jeziku mojih staršev, jeziku, ki nima imena. V tem jeziku se je nahajal moj dom, v njem je bila moja družina [...]« (Vojnović, 2022, str. 21). Vojnovićeva dela so predmet več raziskav – tako na primer Balažic Bulc & Požgaj Hadži (2019) na primeru romana *Figa* razpravljata o spopadu identitet v manjšinskih skupnostih.

2 Pojem »literarna govorica« v prispevku označuje jezik pripovedovalcev literarnih zgodb, ki kaže težnjo po avtentičnosti jezika, ki pa ga ne moremo enačiti z vsakdanjim dejansko govornim jezikom, saj je jezik literarnih oseb načrtno ustvarjen v specifičnem literarnem diskurzu s poudarjeno estetsko funkcijo (prim. Skubic Ermenc, 2005).

ključna teoretska izhodišča procesa alternacije kodov, ki se v jezikovnih praksah pojavlja v različnih oblikah.

Glede na to, ali ostajata jezikovna sistema ločena ali sta med seboj prepletena, študije razlikujejo med preklapljanjem kodov, mešanjem kodov in besedilnim izposojanjem (Gumperz, 1982; Pfaff, 1979; gl. tudi Petrović, 2006, str. 81). Odnos med preklapljanjem kodov kot »najpogostejšo strategijo v sporazumevanju dvojezičnih govorcev« (Hamers & Blanc, 1989, str. 148) in drugimi pojavnimi oblikami alternacije kodov je različno opredeljen, zaradi česar je ločevanje med pojavnimi oblikami alternacije kodov pogosto problematično (Petrović, 2006, str. 57). V analizi pojavnih oblik alternacije kodov je v pomoč zlasti terminološki sistem raziskave Tanje Petrović (2006), saj se je nanj mogoče nasloniti pri že omenjenem problemu ločevanja med pojavnimi oblikami alternacije kodov ter pri opredelitvi značilnosti izbire jezika dvojezičnih literarnih oseb. Gre za težave, ki izhajajo iz strukturne podobnosti genetsko sorodnih južnoslovanskih jezikov in iz dejstva, da je pri opredeljevanju rabe kodov in procesov, značilnih za diskurz dvojezičnih govorcev, uporabljanih veliko nasprotujočih si meril (Petrović, 2006, str. 57–62). V zvezi s slednjim je po zgledu terminološkega sistema, ki ga uporablja že Petrović, alternacija kodov razumljena kot »sukcesivna zamenjava delov diskurza znotraj istega dela izjave, stavka ali diskurzivnega segmenta« (Petrović, 2006, str. 62). Poenostavljenost takega terminološkega sistema se kaže v tem, da se tako kot pri analizi diskurza Srbov v Beli krajini (Petrović, 2006) tudi pri analizi kompleksnega jezika dvojezičnih literarnih oseb ne ugotavlja, ali so mešanje kodov, preklapljanje kodov in izposoja enaki ali različni procesi.

Raziskave so že dokazale, da je razmerje med neslovenskim idiomom v literarnih govoricah, njegovo dejansko rabo v večinsko slovenskem jezikovnem okolju ter kompleksno jezikovno situacijo v prostoru nekdanje skupne države zapleteno (Požgaj Hadži & Balažic Bulc, 2022). Tako kot lahko v dejanskih jezikovnih praksah opazujemo spreminjanje vsakdanje rabe nestandardnih idiomov, se tudi govorice priseljencev in njihovih potomcev po priselitvi v drugo jezikovno okolje s časom spreminjajo. Spreminjanje govora priseljencev spodbuja nastajanje govoric, za katere je v večinsko slovenskem jezikovnem okolju značilna raba slovenskega in srbohrvaškega idioma in ki jih ni mogoče enačiti z nobeno od jezikovnih različic, uporabljanih v prostoru nekdanje Jugoslavije. Te govorice v slovenskem jezikovnem okolju predstavljajo eno od pojavnih oblik slovenščine, ki jih je v skladu s prepričanjem o jezikovni heterogenosti toliko, kolikor je govorcev (Pirih Svetina & Ferbežar, 2005). Heterogenost slovenščine dokazuje več raziskav novejšega obdobja, katerih avtorji zagovarjajo stališče, da so

avtentične govorice priseljencev legitimni, čeprav formalno nepriznani dialekti z dolgo tradicijo, podobni danes tako cenjenim narečjem na jezikovno mešanih ozemljih. [...] V takšnih narečjih, ki vsebujejo besedišče in slovnične značilnosti dveh, treh ali več jezikov, so bila napisana nekatera vrhunska dela sodobne svetovne književnosti (žal pa jih stroka večinoma obravnava ločeno od nacionalnih književnosti,

katerih dela so, in še v tem smislu jih pogosto tretira le kot nekakšne eksotične literarne specialitete). (Žitnik Serafin, 2008, str. 146–147)

Da govorice priseljencev na jezikovno mešanih ozemljih nimajo enakega položaja kot narečja, s katerimi jih primerja Žitnik Serafin (2008), pojasnjujeta zgodovinski kontekst in v njem prisotna ideologija jezikovnega nacionalizma. Greenberg (2005) opaza, da je zlasti v obdobju velikih sprememb in pretresov po razpadu Jugoslavije, ko je bilo treba urediti vprašanja, povezana z novonastalim standardnim jezikom, prav atmosfera jezikovnega nacionalizma rušila osnovno funkcijo jezika kot sredstva medsebojnega sporazumevanja. S stališča, da se govorci sicer različnih etničnih pripadnosti med seboj razumejo ne glede na razlike, ki so nastale z ideološkim ločevanjem med srbskim, hrvaškim, bosanskim in črnogorskim jezikom, je ločevanje med temi jeziki problematično, saj bi lahko bile s standardizacijskim postopkom ustvarjene razlike v drugačnih okoliščinah razlike med različicami istega jezika (Požgaj Hadži et al., 2009). Jezik kot sestavni del etnične identitete v nekdanji Jugoslaviji ne more biti interpretiran kot nekaj objektivnega, temveč je bila jezikovna izbira pripadnikov štirih etničnih skupin, ki so v 90. letih 20. stoletja morali izbrati enega od jezikov naslednikov srbohrvaščine, subjektivna, politično motivirana ter v zelo majhni meri povezana s tem, ali so jeziki štirih etničnih skupin dovolj posebni ali pa gre za različice enega jezika (Greenberg, 2005).

Oris političnih in drugih zunajjezikovnih dejavnikov utemeljuje strukturno podobnost genetsko sorodnih južnoslovanskih idiomov, zaradi katere ločevanje med različnimi jeziki, narečji in drugimi jezikovnimi različicami, rabljenimi v državah nekdanje Jugoslavije, v raziskavi neslovenskih diskurzivnih praks, ki se pojavljajo v literarnem diskurzu, ni bistvenega pomena. Zato je neslovenski idiom, ki se v analizirani prozi pojavlja v različnih oblikah alternacije kodov, v opravljeni raziskavi imenovan »srbohrvaški idiom«.

METODOLOŠKI PRISTOPI V ANALIZI SPECIFIČNEGA JEZIKA LITERARNEGA DISKURZA

Specifičnost analize Vojnovičevih del *Čefurji raus!* in *Jugoslavija, moja dežela* izhaja iz izbire literarnega diskurza kot predmeta raziskave, saj v njem ni fiktivna le zgodba, ampak je načrtno ustvarjen tudi jezik literarne pripovedi. Predpostavljamo lahko, da gre pri rabi idiomov različnih jezikov za literarizacijo ene od govoric migrant-ske skupnosti, ki v sodobnem času živi na Fužinah, in obenem za kritičen odziv na ideološka prepričanja o literaturi v slovenskem prostoru, ki je pogosto enačena s pisanjem izključno v slovenskem jeziku. Glavni namen prispevka je utemeljiti stališče, da je izbira idiomov različnih jezikov v literarnem diskurzu načrtna. Zato je v raziskavi analiziran metapragmatični pomen idiomov, ki se pojavljajo znotraj literarnega diskurza.

Analiza razmerja med resničnim in literarnim metodološko temelji na raziskavah metapragmatike in na študijah Mihaila M. Bahtina, saj so te temelj večine kasnejših raziskav jezika v literaturi (Lee, 1997). Pomemben premik v Bahtinovem raziskovanju alternacije kodov in različnih oblik dialošnosti pomeni prepričanje, da govor in misli literarnih oseb posreduje pripovedovalec, pri čemer sta pri predstavljanju govoric literarnih oseb »znotraj posameznega konteksta dve govorni središči in dve govorni enotnosti oziroma sloga: slog avtorjeve izjave in slog izjave literarne osebe« (Bahtin, 2007, str. 210–211). Pristop vidika govora, ki je prežet z reflektivnim delovanjem, je bil doslej že uporabljen pri razlagi večjezičnih literarnih praks, ki jim raziskovalci pripisujejo metajezikovno funkcijo (Strutz, 1996; Lucy, 1993a). Vlogo metapragmatične zavesti o tem, da se literarni govorci svoje jezikovne izbire zavedajo kot ene od možnih izbir, je ključno ponazoriti zlasti pri analiziranju reflektivnih zmožnosti jezika samega (Petrović, 2006). Tudi za jezikovno rabo kot načrtno izbiro pri ustvarjanju diskurza literarnih oseb je namreč značilno, da jo interpretirajo sami govorci – na primer, ko sporočajo pripombe o jeziku, ko citirajo izjave drugih oseb ali ko bralca usmerjajo na ustrezno interpretacijo svojih izjav (Verschueren, 2004, str. 53, 57; Lucy, 1993a, str. 11). Stališče, da je v literarna dela vgrajeno tuje gradivo, ki ni zajeto iz avtorjeve domišljije ali družbenih in zgodovinskih dogodkov, temveč je izposojeno iz že narejenih besedil, zagovarja tudi Marko Juvan v sodobni teoriji medbesedilnosti in konceptu citatnosti. Po teh teoretskih razlagah literatura ni samo mimezis zunajliterarne resničnosti, ampak se nanaša na govorjene, zapisane ali natisnjene svetove (Juvan, 2000, str. 240).

Pri ustvarjanju premega govora se alternacija kodov pojavlja pogostejše, kar novejše študije interpretirajo kot mehanizem, pri katerem ima pomembno vlogo jezikovna ideologija (Lee, 1997; Tsitsipis, 1998; Petrović, 2006). Stališče, da je izbira med različnimi kodi »v veliki meri izraz jezikovne ideologije govorca«, je skupno več raziskavam jezika dvojezičnih govorcev (Petrović, 2006, str. 142, 147), katerih avtorji ugotavljajo, da pri »izmenični rabi dveh ali več jezikov pri izjavljanju ali v pogovoru pripovedovalec ne posreduje zgolj citirane izjave, temveč ustvarja celotne dialoge« (Grosjean, 1982, str. 145). Namen pripovedovalca torej ni »natančno ponoviti besede druge osebe«, ampak raziskovalci predlagajo »ideološko razumevanje preklapljanja kodov na ravni segmentov diskurza« (Tsitsipis, 1998, str. 122).

ANALIZA ALTERNACIJE KODOV V RAZLIČNIH GOVORNIH POLOŽAJIH

V primerjavi s specifičnim jezikom Vojnovićevega proznega prvenca *Čefurji raus!* se v njegovem drugem romanu, *Jugoslavija, moja dežela*, fonetično zapisane prvine pogovorne slovenščine in citatno zapisane prvine maternih jezikov iz drugih držav nekdanje Jugoslavije le v posebnih govornih položajih vključujejo v zgodbo o iskanju identitete protagonista iz nacionalno mešane družine, ki jo posebej zaznamuje življenje Vladana Borojevića v različnih kulturnih okoljih na območju nekdanje

Jugoslavije. Zaznamovanost življenjskih zgodb z rabo številnih večjezičnih praks in drugih nestandardnih pojavnih oblik jezika so zlasti v primeru romana *Čefurji raus!* opazili tudi literarni kritiki. Raba več jezikovnih kodov je v literarnih kritikah interpretirana kot bistvena značilnost identitete literarnih govorcev. Povezuje se jo zlasti s pripadnostjo starejši generaciji migrantov iz držav nekdanje Jugoslavije ali mlajši generaciji njihovih potomcev, ki živijo v sodobnih urbanih okoljih. Za prvo generacijo priseljencev je značilno, da večinoma razumejo, a slabše obvladajo jezik novega okolja, saj se v veliki meri gibljejo znotraj skupnosti priseljencev in se tudi v novem okolju lahko sporazumevajo v svojem maternem jeziku. Za razliko od tega živijo njihovi potomci večji del svojega življenja v Sloveniji, so dvojezični in se gibljejo med dvema jezikoma ter kulturama.

Predvsem za protagonista romana *Čefurji raus!*, ki pripada mlajši generaciji potomcev priseljencev, je značilno, da se alternacija kodov v njegovi pripovedi ne pojavlja le na leksikalni ravni, ampak tudi na ravni diskurza. Kompleksno rabo več jezikovnih kodov v pripovedih dvojezičnih potomcev priseljencev literarni kritiki opišejo kot prehajanje iz slovenščine v srbohrvaščino na ravni diskurza (Bogataj, 2006) ali kot prehajanje med različnimi jeziki znotraj stavka ali povedi (Jurca Tadel, 2002) ter jo označujejo z različnimi izrazi – »čefurščina«, »fužinščina« (Kosmos, 2008). V primerjavi s tem je v prispevku uporabljan izraz »literarna govorica« ali »govorica literarnih oseb«, s čimer je poudarjena razlika med resničnimi govoricami migrantskih skupnosti in literaturo. Nestandardne in večjezične prakse v analiziranih govoricah protagonistov so del diskurza s poudarjeno estetsko funkcijo in fiktivnostjo. Kot beremo v nekaterih študijah, je namen uporabe specifičnih jezikovnih značilnosti v proznih besedilih to, da avtorji raziščejo »novo obliko subjektivnosti – tisto, ki jo omogoča pripovedno besedilo« (Lee, 1997, str. 278). »Subjektivni sociolekt« literarnih oseb sodi v »imaginativni diskurz« in ga zaznamujejo značilnosti družbenega profila literarnih oseb, kot so starost, poklic, interesne dejavnosti in ekonomski položaj, pripadnost določeni kulturi oziroma subkulturi ali skupnosti migrantov³ (Skubic Ermenc, 2005).

Opazanja literarnih kritikov, ki so že nakazali specifičnost jezikovnih praks večjezične skupnosti, so podrobneje razčlenjena z analizo implicitnih metapragmatičnih mehanizmov, kot je izbira jezikovnega koda (prim. Verschueren, 2004, str. 68). Razčlemba izbire jezikovnega koda in primerov alternacije med različnimi kodi se osredotoča zlasti na protagonistovo prvoosebno pripoved ter na dialoge mlajše generacije potomcev s priseljenci starejše generacije in z vrstniki, ki so prav tako potomci priseljencev in obvladajo srbohrvaški idiom. Analizirane so različne oblike alternacije kodov, ki se pojavljajo znotraj istega dela izjave, stavka ali diskurzivnega segmenta (Petrović, 2006, str. 136, 142) in so del pripovedi, premega ali odvisnega govora literarnih oseb (prim. Bahtin, 2008). Pozornost vzbujajo tudi izjave drugih

3 Družbeni profil pripovedovalcev izbranih del Gorana Vojnovića je podrobneje obravnavan v prispevku »Dialog sodobnih literarnih ustvarjalcev z večkulturnostjo evropske družbe« (Curk, 2017).

literarnih oseb, ki so del protagonistove pripovedi in niso v vseh primerih zapisane v obliki premega govora. V analizi metapragmatičnih mehanizmov so zato podrobneje raziskane okoliščine alternacije kodov pri:

1) citiranju izjav iz idioma priseljencev, ki se pojavljajo v protagonistovi prvoosebni pripovedi pri čemer je preverjano, s katerimi drugimi metadiskurzivnimi sredstvi je v primerih citiranja izjav dvojezičnih govorcev, ki niso vsi zapisani v obliki premega govora, še zaznamovana sprememba koda;

2) citiranju izjav v obliki premega govora, kjer je izbira koda opazovana v dialogih med priseljenci starejše generacije, v dialogih med literarnimi osebami iz različnih generacij migrantske skupnosti (na primer med starši in otroki) ter v dialogih med najstniškimi potomci priseljencev.

IZBIRA JEZIKOVNEGA KODA KOT SREDSTVO VZPOSTAVLJANJA DRUŽBENIH RAZMERIJ

Primeri citiranja izjav literarnih oseb, ki so navedene v pripovedi protagonistov Vojnovićevih del, kažejo, kako izbira srbohrvaškega koda pri citiranju izjav drugih oseb reflektira značilnosti jezikovne in družbene identitete dvojezičnih govorcev, pa tudi, kako izbira jezikovnega koda reprezentira stik različnih jezikov družbenih okolij (Woolard, 2004). Prehod v govor drugih literarnih oseb je v analiziranem diskurzu zapisan na dva načina – v obliki premega ali pa odvisnega govora – pri čemer je sprememba koda zaznamovana z različnimi metadiskurzivnimi sredstvi. Načini označevanja prehoda v govor drugih literarnih oseb so si podobni ne glede na to, ali so v obliki premega ali odvisnega govora, saj vsa metadiskurzivna sredstva, s katerimi je zaznamovana sprememba koda, omogočijo, da se predstavljena stvar izkusi tako, kot bi se jo neposredno zaznalo (Clark, 1996, po Petrović, 2006, str. 163). Omenjena opažanja so v nadaljnji analizi razložena s pomočjo nekaj primerov, s katerimi so ponazorjene jezikovne značilnosti izbranih Vojnovićevih del.

»Mi smo s Fužin, mi vemo, kje smo. Ne boste nas zajebali, ker imamo konpas!«
 »Kakšen konpas! Kompas budalo!« Dejan je najavljal in mi smo se režali ko prasci in Adi je nadaljeval komad Mitra Mirića. »Mogu samo da nas mrže, oni što nas ne vole!«
 »Vozi Miško za Beograd!« »Može Miško i zatvorenih očiju!« Potem je bilo pa konec zajebancije. (Vojnović, 2008, str. 21–22)

A tistega dne, ko je Mirso stopal na stol pred televizorjem in zbrani množici ves razjarjen tulil, da prihajajo »vremena koja će opametiti i najveće budale«, je oče ves zamišljen hodil svojo pot, ne ozirajoč se niti za trenutek na to, kar se je dogajalo le nekaj metrov stran od njega. (Vojnović, 2012, str. 12)

Sprememba koda se v analiziranem diskurzu pogosto pojavlja v trenutku prehoda v premi govor, ko pripovedovalec pri navajanju izjav drugih literarnih oseb preide v srbohrvaški idiom. V primerih, ko so izjave literarnih oseb citirane v obliki premega govora, se z uporabo narekovajev tudi na ravni zapisa ohranja ločnica med glasom pripovedovalca in glasom drugih literarnih oseb.

Njegov pogled je bil prazen kot pogled slepca, in ko sem stal pred trgovino in opazoval, kako se mi približuje, se je zdelo, da bo šel tudi mimo mene, tako kot je šel mimo množice v samskem domu. »Prošao kao pored turskog groblja,« bi temu rekla teta Enisa. (Vojnović, 2012, str. 13)

Neposrednemu citiranju izjav druge osebe raziskovalci pripisujejo poseben pomen, in ta »znatno prispeva k oblikovanju pomena diskurza, v okviru katerega je predstavljeno citirano gradivo« (Recanti, 2000, str. 186–187). Na podlagi tega se domneva, da namen literarnega govorca, ki posreduje premi govor, ni le poročanje besed drugih literarnih oseb, temveč se v tej diskurzivni obliki kaže ideološka dimenzija premega govora. Podobno Deborah Tannen (2007) meni, da besede in misli literarnih oseb pri poročanju v bistvu niso »posredovane/citirane«, temveč gre za kreativno ustvarjeni diskurz, ki v primeru literarnega diskurza ni spontano oblikovan v trenutku govornega dejanja literarnih oseb, temveč je oblikovan načrtno, zato mu ustreza termin »konstruirani dialog«, uveden v razpravi Deborah Tannen (Petrović, 2006, str. 150). Ideološka dimenzija je prisotna tudi v diskurzivnih oblikah premega govora, pri katerih je citiran del izjave (»male komše«, »pomiješaju kolutovi«), ki se po obsegu sicer razlikuje od citiranja celotne izjave določene literarne osebe (»Neka Janezi idu na kupanje u Luksemburg, ako ne vole Jugoslavije«), a oba povezuje to, da prvoosebni pripovedovalec v določenem segmentu svoje pripovedi citira izjave iste osebe.

Cera nas je, svoje »male komše«, kot nas je klical, zastonj spuščal na večerne projekcije v kino Beograd. Takrat je bila dvorana navadno prazna, saj je vsa Pula vedela, da se Ceri po osmi uri »pomiješaju kolutovi« in vrti filme od sredine ali od konca naprej. A ne glede na vso ljubezen do istrske biske je bil Cera eden najbolj prijaznih ljudi, kar sem jih poznal, in tudi ta dan se je, potem ko je videl, da nobenemu od nas ni niti najmanj jasno, kaj se tu dogaja, takoj obrnil k nam in nam dejal: »Neka Janezi idu na kupanje u Luksemburg, ako ne vole Jugoslavije.« (Vojnović, 2012, str. 11–12)

V primerjavi s tem se v pripovedi protagonistov pojavljajo tudi primeri citiranja drugih literarnih oseb, kjer pa narekovaji niso rabljeni in se citiranje izjave signalizira z glagolsko obliko *kot bi rekel*.

Marina je napedenala hud doručak. Bolestan bi ga jeo, kot bi rekel Radovan. (Vojnović, 2008, str. 90)

Da narediš Center strokovnih, moraš biti genijalac. Ker ni, da bi ti kdo pomagal pa da ti bodo dali čas, da se naučiš pa to. Njim je cilj ubiti u pojam, kot bi rekel Radovan. (Vojnović, 2008, str. 122)

To je ta čefurska mentaliteta. Seljaka iz sela lako, ali selo iz seljaka nikako, kot bi rekel Radovan. (Vojnović, 2008, str. 133)⁴

Kot diskurzivno sredstvo za zaznamovanje spremembe koda so v izpisanih primerih uporabljani glagoli govorjenja, ki stojijo pred citirano izjavo ali so vanjo umeščeni in o citiranem govoru ne povedo nič posebnega. Oblika, ki signalizira citiranje izjave v premem ali odvisnem govoru, je tretjeosebna glagolska oblika *kot bi rekel* (*rekla/rekli*), o kateri pišejo že nekatere druge raziskave (Lucy, 1993b): citirana izjava v kombinaciji z navedenim tujim govorom »v najmanjši meri podaja oceno posredovane izjave in vsebuje več pragmatične teže kot pripovedovalčeva širša izjava v celoti. Z drugimi besedami, celotna izjava pripovedovalca prevzame pragmatično 'barvo' citirane izjave« (Lucy, 1993b, str. 96–97, po Petrović, 2006, str. 156, 162).

Citirano izjavo bi bilo sicer mogoče vključiti v pripoved tudi brez glagola govorjenja, vendar bi bilo v njej izraženo stališče v tem primeru stališče prvoosebne pripovedovalca (Petrović, 2006, str. 158). Z rabo glagola govorjenja pa se doseže, da stališče pripovedovalca do vsebine navedenega tujega govora in njegovega prvotnega govorca v premem govoru ni razvidno. Sprememba koda pri navajanju izjave druge literarne osebe v obliki premega ali odvisnega govora pomeni odmik pripovedovalca od vsebine citirane izjave. Pripovedovalec v teh primerih prenaša izjave maternih govorcev srbohrvaškega jezika, s katerimi je v sorodstvenem odnosu. Mlajši literarni govorec z izbiro jezikovnega koda pri prenašanju izjave običajno starejšega govorca na metajezikovni ravni »zaznamuje in ohranja razmerja moči« med literarnimi govorniki ali pa kaže »afekt in solidarnost« (Verschueren, 2000, str. 176–177). Tako alternacija kodov v dialogih potomcev s starejšo generacijo priseljencev ali s svojimi vrstniki implicitno zaznamuje odnose ter s stališča učinkovitosti sporazumevanja ni nujna, niti ni posledica nepopolne kompetence v enem od idiomov, temveč se uporablja za vzpostavljanje bližine in poudarjanje solidarnosti med dvema posameznikoma, ki se prek rabe jezika identificirata s skupnostjo »čefurjev v Sloveniji« (prim. Petrović, 2006, str. 150–151; Verschueren, 2000).

Izbira jezikovnega koda pri citiranju izjave v srbohrvaškem idiomu zlasti starejšo generacijo priseljencev spominja na okolje, v katerem so odraščali, in obenem ustvarja občutek povezanosti znotraj migrantske skupnosti, ki jo reprezentira obravnavani izbor Vojnovićevih besedil. Kot pripoveduje Marko Đorđić v spodnjem primeru, je ideja solidarnosti prisotna zlasti pri pogovorih starejše generacije priseljencev, ki jih

4 Podobne primere v Markovi govorici najdemo tudi na straneh 13, 56, 137, 143, 144, 146, 166 in 182 (Vojnović, 2008).

raba srbohrvaškega idioma tudi v sodobnem času povezuje v skupnost, ki spominja na jugoslovansko:

Če kdo misli, da je komunizem izumrl, se grdo vara. Radovan ga še vedno fura s temi svojimi Krkovići in Čučići. Pri njih je vse ja tebi ti meni. Ne moreš iti niti v štacuno kupit kruh, da ne reče Radovan: »Čekaj, zvaću ja Čučića, da vidi, jel u pekarni kod Krkovića ostala koja štruca viška!« Za vsak kurac se išče veza, samo se gleda, če je kje kdo na -ić, in potem se gleda, kdo ga pozna, ker če je na -ić, potem je čefur in čefurja valda pozna nek drug čefur. [...] Kaj jaz vem, to je najbrž zato, ker so vsi oni takrat v Jugi prišli v tujo republiko in niso imeli blage veze in so vsi presrani iskali svoje ljudi, da jim kao pomagajo, da se lažje znajdejo, ker niso znali ne jezika ne nič. Ampak po tridesetih letih bi pa lahko kaj na tem svetu naredil brez Krkovića in Čučića, jebo ga Tito, da ga jebo. (Vojnović, 2008, str. 39–40)

Potomci priseljencev se, kot v zgoraj citiranem primeru, distancirajo od nostalgичne težnje starejše generacije po medsebojni solidarnosti, jo problematizirajo z vidika slabe vključenosti priseljencev v slovensko okolje in so kritični do prepričanja o kulturno homogeni družbi. Razvijanje kodov solidarnosti in vzajemne lojalnosti je za mlajše generacije potomcev pomembno zlasti zato, ker omogoča »soobstajanje v harmoniji«, kot so pri analizi povezav med alternacijo kodov in idejo solidarnosti opažale že druge raziskave (Hogan-Brun et al., 2009, str. 2, po Petrović, 2011, str. 53).

Z rabo srbohrvaškega idioma pri navajanju premega in odvisnega govora pripovedovalec prevzame glasove literarnih oseb, ki so te izjave izrekale v izvirnem jezikovnem okolju, in jih vključi v svojo pripoved. Raba srbohrvaškega idioma v izjavah literarnih oseb simbolizira dialog z glasovi iz preteklosti, ki se spominjajo nekdanje jugoslovanske države in kolektivne identitete južnoslovanskih narodov. Interpretirana je lahko kot način razčiščevanja s preteklostjo, ki je posredno zaznamovala tudi protagonistovo zavest, njegovo dožemanje življenjskega okolja, v katerem je kot otrok preživel jugoslovanske vojne ter kot odrasel na kolektivni ravni in skozi literarno ustvarjanje ozavestil svojo eksistenco v sedanjosti. Tako literarni diskurz z zgodbami, literarnimi osebami in perspektivami fikcije individualizira in ponazarja splošnejše probleme in se približuje življenjskemu izkustvu, doživljanju in spominu posameznikov (Juvan, 2000, str. 389).

IZBIRA JEZIKOVNEGA KODA KOT SIMBOLA NOSTALGIJE IN SPOMINOV NA PRETEKLOST

Alternacija kodov se v izrazito kompleksnih oblikah pojavlja v pripovedi Marka Đorđića in v dialogih med različnimi literarnimi govorniki srbohrvaškega idioma. *Čefurji raus!* pripoveduje o vsakdanjem življenju priseljencev v Sloveniji, o njihovih nostalgичnih spominih na preteklost in o migracijah prebivalcev znotraj nekdanjega

jugoslovanskega prostora. Kot kritični komentator dogajanja nastopa protagonist romana. Njegova kritičnost je opazna v primeru predstave o Bosni, ki je za starejšo generacijo nostalgичna podoba domovine, o kateri starejši govorci pripovedujejo svojim potomcem. To protagonist občuti, ko ga oče tja pošlje z vlakom. Na vlaku Marko sreča starejšega gospoda in v pogovoru, ki ga ponazarja spodnji citat iz Vojnovićevega besedila, spoznava, da se lažje poistoveti z identiteto »čefurja v Sloveniji« kot »Janeza v Bosni«.

Fužine so zakon. Jaz ne bi v lajfu hotel živet kje drugje. Če jih primerjaš s to jebeno Bosno, s to krntijo od države, potem so Fužine Hollywood. Največji carji so s Fužin. [...] Probudio se čiča. [...] Kdo bo zdržal v tej Bosni? Ni Bosna za nas čefurje. Biti čefur v Sloveniji, to sem vsaj navajen, biti Janez v Bosni je pa cela nova jeba. (Vojnović, 2008, str. 177)

Čeprav je od staršev in priseljenske skupnosti, ki živi na Fužinah, prevzel dvojezično identiteto, zlasti pa znanje srbohrvaškega idioma, mu je bosanska realnost tuja. Izkaže se, da morajo najprej odpasti vse predstave o Bosni, ki so jih posredovale starejše generacije priseljencev. Kot pripoveduje protagonist Vojnovićevega prvenca (Vojnović, 2008, str. 173), se šele nato lahko oblikuje odnos najstnikov do domovine njihovih staršev.

Bosna je država, v kateri vsi pijejo kapučino, ker nikoli ne veš, ali moraš naročiti kavu, kafu ali kahvu. [...] Bosna je država, iz katere so vsi Bosanci pobegnili, ostali pa so samo Srbi, Hrvati in Muslimani. [...] Bosna je država, v kateri se ljudje z nostalgijo spominjajo vojnih časov, ko so vsaj lahko upali, da bo nekoč boljše. Zdaj vejo, da še dolgo dolgo ne bo. In v to Bosno je mene Radovan poslal. (Vojnović, 2008, str. 173)

Na drugačen način se razmerje do preteklosti staršev vzpostavlja v pripovedi Vladana Borojevića, ki o jugoslovanskem obdobju pripoveduje z retrospektivne preteklosti in premi govor v njej dosledno navaja v srbohrvaškem idiomu. Srbohrvaški idiom se v primerjavi z Vojnovićevim prvcem le redko pojavi v pripovedi Vladana Borojevića, ki je v veliki meri zapisana v slovenščini, kodni preklopi v srbohrvaški idiom pa so značilni za navajanje premega govora ali le posameznih srbohrvaških besed, ki so tako kot dobesedni navedki v narekovajih ali pa so zapisani v kurzivu. Z izbiro idioma, ki je imel dominanten položaj v jugoslovanski državi, se skozi roman razvija diskurz nostalgije o državi, ki je ni pomembno določal le skupni srbohrvaški jezik, ampak med drugim tudi pripadnost jugoslovanski vojski. Tak primer je govor Vladanove matere Duše, ki je bila Slovenka, poročena s srbskim oficirjem Nedeljkom Borojevićem. Njeno izbiro srbohrvaškega idioma v izjavi: »Da ja mogu, otišla bi samo da idem, pa makar i u Ljublanu!« interpretira sin Vladan, ki pove, da se je njegova mati »zavedala, da lahko žena srbskega oficirja moža pričaka le v Srbiji, s tem pa je primorana srbsko stran sprejeti za svojo stran, Srbijo pa za svojo domovino« (Vojnović,

2012, str. 118). V tem načinu dojemanja jugoslovanske realnosti je jasno določena hierarhija, kot je bila značilna za življenje v prostoru, ki so ga pomembno povezovali državna ureditev, vojska, srbohrvaški jezik in politična ideologija.

Retrospektivna zgodba o nekdanji Jugoslaviji in življenju v njej se v Vojnovićevih delih razvija na dva načina: s pripovedovanjem Vladanove zgodbe, ki v veliki meri poteka v slovenskem jeziku, s poudarkom zlasti na razvijanju pripovedi, ter z jezikovno kompleksno literarno govorico potomca priseljencev Marka Đorđića, ki podobe migrantske skupnosti ustvarja na metajezikovni ravni – z izbiro srbohrvaškega idioma pri navajanju premega govora v dialogih med starejšo generacijo priseljencev ter v dialogih med različnimi generacijami maternih govorcev srbohrvaščine.

KOMPLEKSNOŠT ALTERNACIJE KODOV V NOVONASTALIH GOVORICAH POTOMCEV PRISELJENCEV

Poleg že omenjenih dveh dialoških situacij v dialoge obeh analiziranih Vojnovićevih romanov vstopajo tudi najstniki drug z drugim. Preklapljanje med kodoma je najbolj kompleksno v dialogih mlajše generacije v romanu *Čefurji raus!* in se pojavlja tako na ravni izjave kot tudi na ravni diskurza. Posebej značilna je izbira srbohrvaškega idioma v čustveno intenzivnih pripovednih okoliščinah, ki dvojezične mlajše generacije spodbudijo k oblikovanju pripadnosti »generaciji, navlečeni na idejo Balkana«. To prikazujejo izjave, v katerih najstniki poudarjajo, »da so takšni kot oni od dol«, »da govorijo kot oni od dol«. Z družbenimi in jezikovnimi vzorci, ki so blizu subkulturi, mlajša generacija vzpostavlja svojo identiteto, ki sicer res nastaja na podlagi nostalgичnega spomina njihovih staršev, a se razvija v kontekstu okolja, v katerem živi mlajša generacija potomcev. Odnos najstnikov do življenja, kulture in jezika njihovih staršev je razviden iz odlomka zgodbe Vladana Borojevića, kjer je v ospredju mešana elementov, ki se navezujejo na jugoslovansko okolje in se v življenju potomcev priseljencev povezujejo v novo identiteto:

»I tata bi sinee!« [...] »Daj še enkrat <Aspirina! Daj Seko!« [...] »Tooooo majstoreee! To nam radiiii!« »... pusti srečo, samo sam muškarac ...« niso mogli biti starejši od šestnajst in plesali so nekaj, kar bi verjetno moralo biti podobno kolu. Bilo je očitno, da pripadajo generaciji, navlečeni na idejo Balkana, ki je uspela med seboj pomešati vse, kar se je pomešati dalo. [...] Važno je bilo samo, da so takšni kot oni od dol, da se oblačijo kot oni od dol, da govorijo kot oni od dol in da se zabavajo kot oni od dol. Njim je dol viselo za vojno in vojne zločince, dol jim je viselo za vse na svetu. Samo ožeži. I rokaj. »... vuuče meee, prokleetooo ...« [...] »More marš u pičku materinu!« V trenutku, ko sem izgovoril te besede, se je vse okoli mene ustavilo. Primože sem dal na mute in se odsotno zazrl predse. Bila je Nedeljkova kletvica, ki je zletela iz mojih ust, kot bi on sam spregovoril iz mene. (Vojnović, 2012, str. 146–148)

V izpisanem primeru izstopa preklapljanje med kodoma, ki je najbolj opazno pri navajanju premega govora. Izbira več jezikovnih kodov je poleg vsebine zgodbe in odnosa med literarnimi sogovorci eden od elementov, zaradi katerih dvojezične govorice, odnosi in sistem vrednot v literarnem tekstu učinkujejo pristno. Sprememba jezikovnega koda pri navajanju izjav v obliki premega govora »ponuja drugačen zorni kot in poudarja videnje dogodka s strani govorca« (Vincent & Perrin, 1999, str. 293). Alternacija ob citiranju pa je posledica dejstva, da je odnos med literarnim pripovedovalcem diskurza in tistimi, katerih govor navaja, zaznamovan s spominom na bivanje v skupni državi, skupnimi značilnostmi jezikovne in družbene identitete ter s tem povezanimi pripadnostjo skupnosti migrantov in solidarnostjo (Petrović, 2006).

ZAKLJUČEK

Različne oblike alternacije med slovenskim in srbohrvaškim kodom, ki se v različnih govornih položajih pojavljajo v Vojnovićevih delih *Čefurji raus!* in *Jugoslavija, moja dežela*, zaznamujejo razmerje med jezikom in identiteto v obdobju po razpadu Jugoslavije. Izbira slovenskega ali srbohrvaškega koda je v analiziranih govoricah priseljencev iz nekdanjih jugoslovanskih republik in mlajše generacije njihovih potomcev najpogostejši implicitni metapragmatični mehanizem.

Znotraj večjezične skupnosti, ki jo sestavljajo različne narodnosti nekdanje jugoslovanske države in ki danes živi na prostoru slovenske države, se z izbiro koda vzpostavljajo različna družbeno-diskurzivna razmerja. Na metapragmatični ravni alternacija med kodoma pri citiranju izjav drugih literarnih oseb v prvoosebni pripovedi nakazuje na občutek solidarnosti in pripadnosti protagonistov migrantski skupnosti. Zlasti v dialogih s prvo generacijo priseljencev je srbohrvaški idiom v premem govoru interpretiran kot sredstvo za izražanje solidarnosti ali poudarjanje bližine oz. povezanosti v odnosih med pripadniki migrantske skupnosti. Občutek povezanosti je posebej izrazit med priseljenci, ki so v novem okolju razvili čut za solidarnost, zlasti med ljudmi z izkušnjo migracije. Ohranjanje solidarnosti tudi v kasnejših obdobjih, ko je življenje v novem okolju že ustaljeno, prvo generacijo priseljencev razlikuje od njihovih potomcev, ki nimajo izkušnje migracije, temveč v slovenskem družbenem prostoru ustvarjajo kulturno in jezikovno večplastno identiteto, kar na jezikovni ravni nakazuje obvladovanje slovenskega jezika ter raznolike oblike alternacije med slovenskim in srbohrvaškim idiomom. Izbira srbohrvaškega idioma pri starejših generacijah zlasti pri citiranju izjav v premem govoru ustvarja poseben diskurz nostalgичnega občutenja pripadnosti okolju, iz katerega so starejše generacije migrirale, mlajši govorci pa z rabo srbohrvaškega idioma v slovenskem jezikovnem okolju oblikujejo specifičen diskurz subkulture. To specifično funkcijo alternacije med slovenskim in srbohrvaškim idiomom potrjuje tudi analiza dialogov med dvojezičnimi najstniki in njihovimi starši.

Primeri intimnih zgodb protagonistov, ki živijo v postjugoslovanskem obdobju, dokazujejo, da so z alternacijo kodov avtentično prikazovani življenje in govorice sodobnih večkulturnih skupnosti priseljencev in njihovih potomcev. Težnja po avtentičnosti in literarizacija različnih oblik večjezičnosti pa nenazadnje pripovedujeta tudi o temeljnih potrebah človeškega bitja: potrebi po tem, da smo lahko to, kar smo, da živimo in izražamo sebe, ter potrebi po pripadnosti družini, skupnosti, kjer smo sprejeti.

ZAHVALE IN DRUGI PODATKI

Avtorica se zahvaljuje anonimnima recenzentoma in urednicama revije. Izvirni prispevek ni bil financiran iz nobenega institucionalnega vira, temveč je nastal kot samostojno raziskovalno delo.

IZJAVA O DOSTOPNOSTI RAZISKOVALNIH PODATKOV

Viri za raziskovalne podatke, ki so uporabljeni v predstavljenem prispevku, so navedeni v seznamu literature, in sicer gre za izbrani prozni deli Gorana Vojnovića. Čeprav prispevek temelji na raziskovalnih podatkih in analizi, ki je bila opravljena v okviru avtoričinega doktorskega dela »Govorice družbenih okolij v sodobni slovenski prozi« (Curk, 2016), prinaša nove ugotovitve in spoznanja, ki jih doktorsko delo ni vključevalo.

VIRI IN LITERATURA

- Bahtin, M. M. (2007). *Problemi poetike Dostojevskega*. Literarno-umetniško društvo Literatura.
- Bahtin, M. M. (2008). *Marksizem in filozofija jezika*. Studia humanitatis.
- Balažič Bulc, T., & Požgaj Hadži, V. (2019). Sukob identiteta u manjinskim zajednicama: na primerju romana *Figa* Gorana Vojnovića. *Riječ*, 16, 49–68.
- Bogataj, M. (2006). Bluz (na tri gole). *Literatura*, 18(175/176), 164–176.
- Curk, M. (2016). *Govorice družbenih okolij v sodobni slovenski prozi* [doktorska disertacija, Podiplomska šola ZRC SAZU]. ReVIS. <https://revis.openscience.si/lzpisGradiva.php?id=13643>
- Curk, M. (2017). Dialog sodobnih literarnih ustvarjalcev z večkulturnostjo evropske družbe. *Slavistična revija*, 65(3), 487–499.
- Greenberg, R. D. (2005). *Jezik i identitet na Balkanu. Raspad srpsko-hrvatskoga*. Srednja Europa.
- Grosjean, F. (1982). *Life with two languages: An introduction to bilingualism*. Harvard University Press.
- Gumperz, J. J. (1982). *Discourse strategies*. Cambridge University Press.
- Hamers, J. F. & Blanc, M. H. A. (1989). *Bilinguality and bilingualism*. Cambridge University Press.
- Jurca Tadel, V. (2002). Andrej Skubic: Fužinski bluz. *Ampak – Mesečnik za kulturo, politiko in gospodarstvo*, 3(8/9), 88–89.
- Juvan, M. (2000). *Intertekstualnost*. DZS.
- Kosmos, I. (2008). Medkulturni roman za medkulturno leto 2008. *Literatura*, 20(207/208), 231–237.
- Lee, B. (1997). *Talking heads: Language, metalanguage, and the semiotics of subjectivity*. Duke University Press.
- Lucy, J. A. (1993a). Reflexive language and human disciplines. V J. A. Lucy (ur.), *Reflexive language: Reported speech and metapragmatics* (str. 9–32). Cambridge University Press.
- Lucy, J. A. (1993b). Metapragmatic presentationals: Reporting speech with quotatives in Yucatec Maya. V J. A. Lucy (ur.), *Reflexive language: Reported speech and metapragmatics* (str. 91–126). Cambridge University Press.
- Petrović, T. (2006). *Ne tu, ne tam: Srbi v Beli krajini in njihova jezikovna ideologija v procesu zamenjave jezika*. Založba ZRC, ZRC SAZU.
- Petrović, T. (2011). Jeziki in večjezičnosti. V M. Lukšič Hacin, M. Milharčič Hladnik, & M. Sardoč (ur.), *Medkulturni odnosi kot aktivno državljanstvo* (str. 49–57). Založba ZRC; ZRC SAZU.
- Pfaff, C. W. (1979). Constraints on language mixing: Intrasentential code-switching and borrowing in Spanish/English. *Language*, 55(2), 291–318. <https://doi.org/10.2307/412586>

- Pirih Svetina, N., & Ferbežar, I. (2005). Slovenščine tujejezičnih govorcev. *Jezik in slovstvo*, 50(6), 3–15.
- Požgaj Hadži, V., Balažic Bulc, T., & Radovanović, M. (ur.). (2009). *Med politiko in stvarnostjo: Jezikovna situacija v novonastalih državah bivše Jugoslavije* [Between politics and reality: The linguistic situation in the new states of the former Yugoslavia]. Filozofska fakulteta Univerze v Ljubljani.
- Požgaj Hadži, V., & Balažic Bulc, T. (2022). *Formiranje jezika i njegovo rastakanje: od srpskohrvatskoga do hrvatskoga, srpskoga, bosanskoga i crnogorskoga*. <https://ebooks.uni-lj.si/ZalozbaUL/catalog/view/373/700/8084>
- Recanati, F. (2000). *Oratio obliqua, oratio recta: An essay on metarepresentation*. MIT Press – A Bradford Book.
- Skubic Ermenc, A. (2005). *Obrazi jezika*. Študentska založba.
- Strutz, J. (1996). Istrska polifonija – večjezičnost in literatura. *Annales*, 6(8), 187–196.
- Tannen, D. (2007). *Talking voices: Repetition, dialogue, and imagery in conversational discourse* (2. izdaja). Cambridge University Press. (Prva izdaja leta 1989)
- Tsitsipis, L. (1998). *A linguistic anthropology of praxis and language shift: Arvanitika (Albanian) and Greek in contact*. Oxford University Press.
- Verschueren, J. (2000). *Razumeti pragmatiko*. Založba *cf.
- Verschueren, J. (2004). Notes on the role of metapragmatic awareness in language use. V A. Jaworski, N. Coupland, D. Galasinski (ur.), *Metalanguage: Social and Ideological Perspectives* (str. 53–73). Mouton de Gruyter.
- Vincent, D., & Perrin, L. (1999). On the narrative vs. non-narrative functions of reported speech: A socio-pragmatic study. *Journal of Sociolinguistics*, 3(3), 291–313.
- Vojnović, G. (2008). *Čefurji raus!* Študentska založba Beletrina.
- Vojnović, G. (2012). *Jugoslavija, moja dežela*. Študentska založba Beletrina.
- Vojnović, G. (2022). *Zbiralec strahov*. Založba Goga.
- Woolard, K. A. (2004). Codeswitching. V A. Duranti (ur.), *Companion to Linguistic Anthropology* (str. 73–93). Blackwell Publishing.
- Yildiz, Y. (2012). *Beyond the mother tongue: The postmonolingual condition*. Fordham University Press.
- Žitnik Serafin, J. (2008). *Večkulturna Slovenija: položaj migrantske književnosti in kulture v slovenskem prostoru*. Založba ZRC, ZRC SAZU.

SUMMARY

CODE ALTERNATION IN GORAN VOJNOVIĆ'S PROSE TEXTS

Mateja Curk

The socio-discursive relations between literary interlocutors are examined from the perspective of the code that the speaker chooses when quoting statements in first-person narrative or direct speech. In the statements of other literary figures quoted in the protagonist's first-person narrative, code alternation at the metapragmatic level suggests a sense of solidarity and belonging to the migrant community. In cases of code alternation in direct speech, the older generations' choice of the Serbo-Croatian idiom creates a specific discourse of nostalgic belonging to the environment from which they migrated. In contrast, younger speakers' choice of the Serbo-Croatian idiom in the Slovene linguistic environment forms a specific subcultural discourse. A review of the analyzed material shows that in dialogues between speakers linked by generational or kinship relations, code alternation occurs in various forms, at several linguistic levels (lexical, syntactic, and discursive), and in unpredictable linguistic contexts. This apparently arbitrary process of code alternation points to the tendency of bilingual literary figures to create authentic speech that, as in real linguistic practices, appears spontaneous and without clearly defined patterns of use for a particular linguistic code.

PODOBA DOMOVINE V DELIH FRANCETA PAPEŽA

Urh Ferlež¹

COBISS 1.01

IZVLEČEK

Podoba domovine v delih Franceta Papeža

Izseljenski avtor France Papež pripada povojni politični emigraciji, ki je svoj drugi dom našla v Argentini. Avtor v prispevku analizira, kako se v njegovem pripovednem in pesniškem opusu, zaznamovanem s temo izseljenstva, dvojnimi identitetami in razmišljanjem o vprašanih bivanja, kaže podoba domovine na podlagi Rushdiejeve teorije o umišljeni domovini ter tipologije nostalgije, kot jo je postavila Svetlana Boym. Pokazalo se je, da so za Papeža umišljena domovina njegovi domači kraji v času pred drugo svetovno vojno, glavno sporočilo njegovega opusa pa je, da izseljenec sicer ne sme pozabiti svojega jezika, vere in kulture, a se mora hkrati živeti v novem okolju in ostati pozitiven.

KLJUČNE BESEDE: France Papež, Argentina, Slovenska kulturna akcija, umišljena domovina, nostalgija

ABSTRACT

The Image of the Homeland in the Works of France Papež

The émigré author France Papež belongs to the postwar political emigration that found its second home in Argentina. In this article, the author analyzes how the themes of exile, dual identity, and reflections on existential questions shape the image of the homeland in Papež's narrative and poetic work. Based on Rushdie's theory of the imaginary homeland and Boym's typology of nostalgia, the analysis shows that Papež's imaginary homeland is represented by his native places as they were before World War II. The central message of his oeuvre is that while emigrants must not forget their language, faith, and culture, they must also adapt to their new environment and remain positive.

KEYWORDS: France Papež, Argentina, Slovenian Cultural Action, imaginary homeland, nostalgia

¹ mag. prof. slovenščine, francoščine in umetnostne zgodovine; Univerza Karla in Franca v Gradcu; Filozofska fakulteta, Inštitut za slavistiko, Gradec; urh.ferlez@uni-graz.at; ORCID <https://orcid.org/0009-0001-7301-1259>

UVOD

France Papež (1924–1996) je eno najpomembnejših imen slovenske pisave v slovenski povojni izseljenski skupnosti v Argentini.¹ V prispevku je analiziran izbor avtorjevih pesniških in pripovednih del, v katerih ta govori o domovini, s poudarkom na pripovednem delu *Zapisi iz zdomstva*. Primarni cilj prispevka je prikazati podobo domovine, kot se kaže skozi njegova dela, sekundarni cilj pa je podati premislek o njihovi literarni vrednosti.²

IZSELJENSKI POGLED DOMOV

Izseljenska književnost je specifičen del slovenske književnosti. Zaznamujejo jo kulturno-identitetne, tematske in slogovne značilnosti, ki pa vse izhajajo iz posebnega družbeno-kulturnega položaja avtorjev – iz priseljskega statusa avtorjev. To je povezano z njihovim jezikovnim položajem, publikacijskimi možnostmi in zamejeno ciljno publiko (Žitnik Serafin, 2014, str. 34). Izseljenska književnost je zaradi te specifične pogosto tema interdisciplinarnih raziskav, tudi disciplinarne, literarnovedne, pa se težko izognejo poseganju na druga polja (Žitnik Serafin, 2014, str. 35).

Pogosta tema v raziskovanju drugih nacionalnih izseljenskih književnosti je podoba domovine, kot se kaže v delih avtorjev (npr. Williams, 2022; Mélat, 2002; Laurušaitė, 2015). Za slovensko književnost je takih raziskav malo – eden izmed primerov je razprava Irene Avsenik Nabergoj, v kateri je avtorica analizirala pogled na domovino, kot se kaže v delih treh slovenskih izseljenskih pesnic (Avsenik Nabergoj, 2005). Podoba domovine je pri izseljencih zaradi prostorske in časovne oddaljenosti ter nostalgичnih čustev težko objektivna. Dvojnost stare in nove domovine je za mnoge izseljenske avtorje vir navdiha.

Pri analizi Papeževih literarnih del se bom, poleg raziskave Irene Avsenik Nabergoj, naslonil na Rushdiejevo misel o umišljenih domovinah in tipologijo nostalgije, kot jo je vpeljala Svetlana Boym. Salman Rushdie, tudi sam pisatelj z izseljensko izkušnjo, je v eseju *Imaginary homelands* postavil koncept, ki ga slovenim kot »umišljene domovine«. Bistvo tega koncepta je, da je pogled izseljenca v domovino

1 Po drugi svetovni vojni je v Argentino emigriralo okoli 6.000 Slovencev. Šlo je predvsem za ljudi, ki med drugo svetovno vojno niso podpirali narodnoosvobodilnega boja ali pa so bili vključeni v protikomunistične oborožene vojaške formacije (slovensko domobranstvo idr.). Večina je v Argentino prišla iz begunskih taborišč v Italiji in Avstriji. Naselili so se večinoma v okolici Buenos Airesa in vzpostavili tesno povezano skupnost, ki se je odlikovala z dobro organizacijo in bogatim kulturnim delovanjem. Slednje je omogočilo tudi razmah slovenske književnosti v Argentini. Za to skupnost so vse do danes pomembni protikomunistična politična drža, krščanska vera, slovenski jezik in narodna zavest, ki se je v določeni meri uspela prenesti tudi na tretjo generacijo potomcev članov skupnosti, rojeno v Argentini (prim. Žigon, 2001).

2 Prispevek je nastal v letu 2024, v spomin na stoletnico avtorjevega rojstva. Za prijazno pomoč se zahvaljujem Andreji, Gregorju in Borisu Papežu, Roku Finku in Tonetu Mizeritu.

hkrati pogled nazaj v kraju in v času. Gre za fiktivno podobo, ki ima korenine v resničnosti, od katere pa je posameznik ohranil le drobce in jih povezal v lastno podobo, ki je po njegovem mnenju koherentna. Predstavlja del človekove identitete, ki pa je pri izseljencih pogosto nestabilna oziroma vsaj dvojna, prav iz te dvojnosti pa lahko izhaja potreba po literarnem ustvarjanju (Rushdie, 1992, str. 9–21).

Soroden koncept je pri analizi izbranih del Nabokova in Brodskega v svojem delu *The Future of Nostalgia* uporabila Svetlana Boym. Njena definicija nostalgije je sorodna Rushdiejevim umišljenim domovinom: gre za hrepenenje po domačnosti, po trenutku, za katerega se za nazaj zdi, da so bile stvari na svojem mestu. Pomenljiva je avtoričina tipologija nostalgije, ki jo razdeli na rekonstrukcijsko in refleksivno nostalgijo (angl. *restorative nostalgia*, *reflective nostalgia*). Tipologija je med drugim utemeljena na etimologiji besede nostalgija (grško: νόστος – vrnitev domov, ἄλγος – hrepenenje, bolečina; torej Odisejev *nostos* in *algos*, hrepenenje po vrnitvi domov).

Rekonstrukcijska nostalgija se osredotoča na *nostos* in trdi, da obstaja absolutna resnica, neka idealna tradicija, s katero je mogoče rekonstruirati izgubljeno domovino. S tem so povezane populistične teorije zarote, ki imajo moč, da ljudi delijo na več polov, in so včasih tudi gonilo totalitarizmov. Rekonstrukcijska nostalgija je ideološka podlaga za nespontano umetno obnavljanje tradicij, običajev, rekonstrukcijo starih stavb v prvotnih stilih brez sodobnega premisleka in podobno. Takšna nostalgija lahko botruje radikalnim nacionalističnim in verskim gibanjem, saj ni dojemana kot nostalgija, temveč kot resnica (Boym, 2001, str. 41–47).

Refleksivna nostalgija je osredotočena na *algos*, ki ne stremi k rekonstrukciji izgubljenega doma, temveč k hrepenenju po vrnitvi, a navadno k odlašanju te vrnitve. Ne zanima je toliko »uradna«, velika zgodovina domovine, ki jo je treba držati v idealnem stanju, temveč bolj individualni in kolektivni spomin nanjo. Refleksivna nostalgija zbira razbite drobce spomina, z distanco, neredko tudi z ironijo, kar pa nikakor ne zmanjšuje njene pomembnosti. Taka nostalgija je lahko pomemben element (po Bergsonu) *élan vital*, življenjske sile, ki vpliva na videnje preteklosti, identiteto in oblikovanje prihodnosti (Boym, 2001, str. 48–55).

ŽIVLJENJE IN DELO AVTORJA

France Papež se je rodil v Beli krajini. V Črnomlju je končal meščansko šolo, po italijanski kapitulaciji (1943) je vstopil v partizane, a že konec istega leta odšel k domobrancem, nikoli pa ni bil udeležen v bojih. Konec vojne je dočakal v Ljubljani in se z ostalimi begunci umaknil na Koroško. V begunskih taboriščih je končal gimnazijo, tam je tudi začel pisati, leta 1948 pa je emigriral v Argentino. Vrsto let je delal kot uradnik v tekstilni tovarni. Bil je eden ustanovnih članov Slovenske kulturne akcije, aktiven pa je bil tudi v slovenskem domu Carapachay in kot urednik revije *Meddobje* (od leta 1970). Zanj je prevajal ter napisal številne prozne, pesniške, filozofske, teološke in druge prispevke. Uredil je zbrano delo Franceta Balantiča (Glušič, 1999).

Poleg revijalnih objav sta pri Slovenski kulturni akciji izšli dve njegovi pesniški zbirki, *Osnovno govorjenje* (1957) in *Dva svetova* (1985), ter pripovedno delo *Zapisi iz zdomstva* (1977). Njegove pesmi so bile vključene v vse antologije slovenske izseljenske književnosti, leta 2001 pa je bil pri celjski Mohorjevi ponatisnjen izbor njegovih pesmi (Glušič, 1999).

Helga Glušič je pesniški opus Franceta Papeža označila za pomemben »v okviru argentinske slovenske kulturne skupine protikomunističnih beguncev« (Glušič, 1999, str. 344). V njegovi poeziji je videla vplive Srečka Kosovela in Edvarda Kocbeka, pa tudi slovenske ljudske pesmi in slovenskih ekspresionistov. Njegova poezija je predvsem bivanjska in izpoveduje usodo posameznika in naroda (Glušič, 1999, str. 344). Z njegovim literarnim delom se je ukvarjala Helena Dobrovoljc, ki na podlagi obsežne analize pritrjuje Helgi Glušič. V njegovem delu dokazuje prvine eksistencialistične filozofije – podobno Andrej Rot (1994, str. 134), Igor Grdina (1990) in Jože Pogačnik (1972). Papež večinoma uporablja svobodni verz, njegove pesmi pa pogosto temeljijo na konkretnem biografskem izkustvu. Papeževo razmišljanje o bivanju, iskanju (zdomskega) smisla je izrazito pozitivno naravnano. Njegovo osrednje pripovedno delo *Zapisi iz zdomstva* je Dobrovoljčeva označila kot sintezo raznovrstnih proznih prispevkov literarnega in polliterarnega značaja (Dobrovoljc, 1999, str. 116). Delo je zvrstno težko označiti, besedilo pa je mestoma precej poetično formulirano (Glušič, 2001, str. 180). Pripovedovalec je prvoosebni, avtorski. Delo predstavlja skupek vseh tem, ki so ga zanimale, njegovih svetovnih nazorov, poleg tega je v njem precej avtobiografskega, zato sem to delo izbral kot osrednje za premislek o njegovi umišljeni domovini, nato pa sem nanj navezal še avtorjeva druga prozna in pesniška dela. Pri analizi narativa vračanja domov se bom navezal še na njegovo kratko zgodbo *Vrata* (Papež, 1984).

POGLED NAZAJ V ZAPISIH IZ ZDOMSTVA

Za Papeževo ustvarjanje in razmišljanje, tudi samopozicioniranje, je ključen naslednji odstavek iz *Zapisov iz zdomstva*:

Desetletja smo že na potovanju, a nam je olajšano z dejstvom, da smo v *slovenskem* zdomskem svetu in da smo si ustvarili zdomsko Slovenijo z njenimi ustanovami, idejami in močmi. Svet slovenstva leži v treh geografskih in bitnih sferah: v domovini, s skrinjo žive besede, v obmejnem pasu zamejstva, s trpečo besedo, in v tretji sferi zunanjega in prekomorskega sveta, z umirajočo besedo. (Papež, 1977, str. 12).

Za Papeža stanje njegove skupnosti ni emigracija – slednjo dojema kot odisejado, dolgo vračanje domov, med katerim pridobiva tako pozitivne kot negativne izkušnje. Natančno pojasnjuje, zakaj se je sam skupaj z drugimi emigranti po vojni znašel v Argentini, a o NOB ne govori s sovraštvom, zamerami – piše trdno s stališča svoje

skupnosti (s krščanskimi nazori, a bližje politično manj ekstremni struji skupnosti), pri čemer se trudi ostati objektivni. Sposoben je dovolj zrelega premisleka, da drugo svetovno vojno, čeprav je na svoji koži občutil njeno gorje, označi kot »zgodovinski dogodki, ki so pripeljali do naše napotitve v svet«. Obenem je kritičen do komunističnega in kapitalističnega modela vladanja: »zasužnjenje – bolj ali manj direktno – tu in tam« (Papež, 1977, str. 144).

Kot da bi hotel odmisлити težke dogodke, Papež na več mestih v *Zapisih iz zdomstva* poglavja o medvojnih spominih kontrastno prekinja s poglavji o doživljajih v Argentini. Tako na primer naštevanje krajev, kjer ležijo po vojni pobiti domobranci, na naslednji strani nadaljuje s skokom v Humauhaco, idilično vas pod Andi, ki jih je obiskal in jih doživlja precej duhovno poglobljeno. Kot rdeča nit pa se v knjigi pojavlja vprašanje, kaj je zdomstvo, na katerega avtor odgovarja na različne načine (Papež, 1977, str. 21).

V *Zapise* vpleta misli vrste drugih slovenskih in evropskih klasikov, pri čemer izseljensko družbo primerja s tisto iz Proustovih romanov: »[Č]as opravlja brezobzirno delo, tragično spreminja v spomin v vse, kar je bilo v njej in v njenem svetu lepega in velikega, vse, kar je bilo frivolnega in gnilega. Spomin se rešuje v umetniškem oblikovanju in trdno je to, kar je v času umetniško poustvarjeno« (Papež, 1977, str. 27).

Proustova impresionistična freska se mu zdi kot veliki tekst o spominu primerna za pisanje o izseljenski izkušnji, in po njej se zgleduje tudi v *Zapisih*, saj na videz banalne in nepomembne spomine prepleta z velikimi zgodovinskimi dogodki in spomini na vzpostavljane slovenskih organizacij njegove skupnosti v Argentini, pri čemer pa se zdi, da je delo kljub »impresionizmu«, preskokih in zgodovinopisnih vložkih zaokrožena celota. Citira odstavek iz romana *V Swannovem svetu*, kjer se pripovedovalec spominja pokrajine v okolici Combraya:

Méségliška in guermantska stran pa sta zame predvsem bogati ležišči duhovnih zakladov, trdna tla, na katera se opiram še dandanes. Takrat, ko sem hodil po njunih stezah, sem še veroval v stvari in v ljudi, zato so tiste stvari in tisti ljudje, ki sta mi jih dali spoznati, edini, ki mi še kaj pomenijo in ki mi darujejo še kaj radosti. Bodisi, da mi je usahnila ustvarjalna vera, bodisi, da se resničnost oblikuje le v spominu – cvetje, ki ga vidim sedaj prvič, se mi ne zdi pristno cvetje. (Proust, 2022).

Papež zapiše, da enako čuti do krajev v svojih spominih – njegova umišljena domovina je torej v »zgornjem svetu«, kot sam pravi. Večkrat se poda v naravo v okolici metropole Buenos Airesa, katere lepoto sicer občuduje, leže v rastlinje in zapiše: »[S] amo tistih drobnih slovenskih marjetic ni« (Papež, 1977, str. 16).

Skozi zgodbo potuje skozi več slovenskih in argentinskih pokrajin. Zase pravi: »[D]okler potujem, hrepenim – dokler hrepenim, sem« (Papež, 1977, str. 12). Njegovo potovanje je torej nostalgичno, njegovo početje v Argentini, delo v slovenski skupnosti, je nostalgija po domu. Ta razmislek vplete v poglavje o gledališču v njegovi skupnosti, pripovedovalec o tem razmišlja, medtem ko na odru pred njim uprizarjajo

Lepo Vido. Premišlja, kako se hrepenenje kaže pri drugih članih skupnosti: »Benčič dela, zida, Klemenc prekuščuje; [...] Lončar piše in prevaja, Jurkič politizira. [...] En sam skupen svet imamo, a v hrepenenju se obrača vsakdo v svoj posebni svet« (Papež, 1977, str. 62). Rushdiejev poudarek, da ima vsak človek svojo, unikatno umišljeno domovino, lahko pri Papežu torej potrdimo.

Zanj so »sokovi domačega sveta« tradicija, poezija, zemeljske in nadzemeljske skrbi. »Emigrant ima dve duši – eno za ta svet, drugo za oni,« pravi, s čimer nakuže dvojno identiteto izseljenca. Njegova Slovenija je zanj dežela tradicijskih stališč, simbol krščanskega kmeta, viničarja; gorskih vil, triglavskih rož. Njegovi sodelavci v Argentini mu predstavljajo to Slovenijo v spodnjem svetu, zaradi katerih je »v najčistejših in najbolj jasnih dneh mogoče od tu videti v tisti triglavski svet, v gorice in gozdove« (Papež, 1977, str. 82).

Domovina je za Papeža tudi mitologija iz domačih krajev – tako je v *Zapise* vključil zgodbo o čarovnikih iz Roga, o velikanu, ki bo požrl deželo; na drugi strani pa tudi indijansko legendo o Néhuenu in Aluminé in pravoslavno legendo o nadangelu in črvu v peščenem semenu. Svojevrsten spominski vložek je skrivnostni prihod obiskovalca na pripovedovalčev dom:

Obiskovalec se je obrnil, vzel izpod plašča neke papirje in jih počasi razložil po mizi, po stolih in po tleh. Iz njih je sestavil načrt mesta z vsemi njegovimi obzidji in stolpi, zbirališči in trgi, hišami, palačami in cerkvami; ozke in široke ceste so se zvijale med mestnimi predeli ter odhajale po bližnjih gozdovih in gorah. Bilo je naše, poznano mesto. In na papirjih so bili zapisani naslovi, podatki o domovih in vrtovih, o letnih časih in procesijah in grobovih. [...] Na drugem, popolnoma orumenelem listu papirja, so bili načrti gozdov in jas, starih zidov, grap in strmin, kjer smo se borili in padali in tudi slike tistih, ki sem jih poznal in so ostali tam. Zavedel sem se – obiskovalec je prihajal iz našega najbolj intimnega sveta. (Papež, 1977, str. 79).

Zopet se pred nami razgrne pisateljeva umišljena domovina, sestavljena iz spominskih drobcev, umišljeno mesto je *naše in poznano*. In čeprav se mesto zdi realistično in celovito, so ljudje, ki jih je poznal, le še slike na porumenelem listu. Izkaže se, da je obiskovalec Dante, pripovedovalec pa ga vpraša za pot – pravo pot izseljenca. Poet mu odvrne: »Prijatelj, čas ni ozdravil ran – pogloblja jih in vas tako očisti za pot po drugih krogih ...« (Papež, 1977, str. 82). Pripovedovalec pa spozna, da je izseljenstvo le vmesna faza, po krščanski predstavi pendant vicam.

Dvojica čas – kraj se potrdi na mnogih mestih: »Stvaritve in podobe našega umetnika morajo imeti v sebi ‚duha‘, ki je prinešen iz alpsko-kraško-panonskega sveta in iz časa trdote, milobe, sončnosti in teme.« Izseljenec-umetnik, razklan med domovinama, se ne prilagodi tej ali oni stvarnosti, temveč »izraža več: nad-stvarnost, ki je estetsko lepa in pomembna« (Papež, 1977, str. 99).

»Sem na poti – bi dejal z Levstikom – od Litije do ... konca sveta,« pravi (Papež, 1977, str. 58). Umišljena domovina ima tudi svojo literarno podstat, to je svet

(religioznega) ekspresionizma, ki je zaznamoval čas avtorjeve mladosti. Veliko razpravlja o zgodovini slovenske literature, tudi z namenom, da bi literarno produkcijo svoje skupnosti navezal na to tradicijo.

Strah pred tem, da bi njemu in njegovi skupnosti kdo stregel po življenju in delu, je izrazil v grotesknem prizoru, v katerem revolucionarji v podobi okostnjakov pregledujejo knjige Slovenske kulturne akcije, trgajo liste in si z njimi mašijo usta. Izkaže se, da je pripovedovalec le sanjal. V drugem podobnem prizoru iz podivjanih tiskalnih strojev letijo pole z lažmi o skupnosti in potvorjeno zgodovino (Papež, 1977, str. 53).

Skozi zgodbo se zdi, da pripovedovalec zori, se stara in potuje vedno dlje od domovine. Prav tako postopoma razkriva vedno bolj intimne misli in vedno bolj žalostne dogodke iz vojnih let. Stari svet njegove umišljene domovine simbolizirajo dela Prešerna, Ketteja, Balantiča, ki jih nosi s sabo, a kot pravi: »Ob tem občutim slovenstvo čedalje bolj kot panoramo mističnih preraščanj, dramatskih vprašanj ohranitve« (Papež, 1977, str. 118). To oddaljevanje ponazori s prizorom srečanja ob obletnici najpomembnejše domobranske bitke. Sonarodnjaki se zberejo v lokalu, oblečeni v stare obleke, ki so jih prinesli s sabo (»še iz onega sveta«). Po večerji naj bi eden od njih povedal nekaj pozdravnih besed, a se je zgodilo sledeče: »[N]enadoma smo se počutili tako oddaljeni eden drugemu, tako prežeti s tujim, spremenjeni in izpraznjeni, da nam ni bilo mogoče obstati« (Papež, 1977, str. 119). Papež je torej moral priznati, da niti skupnost, ki se je imela za edino »pravo slovenstvo«, ni mogla ostati imuna pred vplivi kulture države gostiteljice in – kar je še pomembneje – pred vplivi časa in geografske oddaljenosti od domače zemlje in naroda.

Pomenljiv izseljenški trenutek je koncert zbora Slovenskega doma v Mendozi na sedežu slovenske skupnosti v Buenos Airesu. Opisuje reakcije poslušalcev, ko tisoče kilometrov od rojstnega kraja zaslišijo belokranjske ljudske pesmi, ki izvirajo od tam, in prav gotovo je podobno ganilo tudi Papeža, čeprav govori o svojih sokrajanih:

Najprej je izginil filozof, se pravi, ni izginil, ampak Jože ga ni več prepoznal in kmalu tudi ne več videl. Izkazalo se je, da se stvar ni godila v tem mestu, ampak v majhni vasici blizu Metlike, pod Gorjanci – v Drašičih. Vse je bilo čisto naravno. Na tistem vrtu je bilo zbranih precej ljudi in Jožetu se je zdelo, da je mnoge prepoznal. Med njimi so bili tudi tisti, ki so v dneh revolucije odšli v gozd in jih potem ni več srečal. Zdaj so bili že umirjeni. (Papež, 1977, str. 123)

Pesem deluje kot portal v umišljeno domovino, kjer so se celo medvojna politična nasprotja zgladila. Konec poglavja prinese streznitev: »Prvi zor se je že svetlikal na nebu, ko se je Jože vrnil in se znašel na poti ob reki. Sprejela so ga drevesa, kameenje in pesek. Vedel je: zadnja realnost je vselej zdomstvo – mesto s svojimi zidovi in cestami; širna ravnina s suhimi travniki in prašnimi potmi« (Papež, 1977, str. 124).

France Papež reflektira minljivost jezika v izseljenstvu (»umirajoča beseda«), se zaveda časovne omejenosti slovenščine v emigraciji in implicitno priznava, da

izseljenska skupnost ni statična. Zaveda se pomena »ohranjanja« slovenske kulture in pa utehe, ki jo to daje izseljencu. Intenzivnost doživljanja umišljene domovine pojasni z Jezusovimi besedami:

Naša zrelost je v sprejetju življenja in sveta, ki prihaja od zunaj; je pa tudi v obdržanju tistega, kar je bil in kar je slovenski genij. Svoboda je bitna in učenost, ki si jo pridobimo, je ta: kjer so zbrani naši ljudje – dva, trije ali več – je z njimi domovina in takrat se jim ameriška zemlja in nebo spremenita v domače in čas mineva naglo. (Papež, 1977, str. 129)

NA REALNIH TLEH

S podobno treznostjo kot do zgodovine se Papež opredeli do slovenske migracije iz obdobja med obema vojnama,³ ki je zanj zgolj ekonomska, čeprav so mnogi Slovenci tudi takrat odšli iz političnih razlogov. Medvojno skupnost označi kot tisto, ki gleda naprej in okoli sebe, politična povojna pa je nenehno obrnjena nazaj, pogojena z zgodovino in idejo. Prav zato pravi, da se njegova skupnost bolj »vica« v svojem ohranjanju. Poudari dvojno osamljenost, kar jo zopet loči od medvojne skupnosti: »Kljub temu, da se pozdravljamo in si podajamo roke z domačini tega sveta, smo več ali manj osamljeni. Sicer pa je tako tudi zgoraj – doma.« Veliko delo, ki so ga opravili njegovi tovariši, pohvali takole: »O, kaj vse so že ustvarili, napisali in pojasnili ti delavci in bojevniki! Na podstrešju hranim na tisoče koledarjev, knjig, časopisov, Meddobij, Glasov ... vse je nastalo iz napore spoznati to zemljo in obdržati se v močeh slovenskega duha« (Papež, 1977, str. 130).

V zadnjem zapisu razodene Papež tisto, kar se mu zdi najpomembnejše: če bi mu bilo dano iti na konec sveta (kar se mu je zgodilo), pravi, bi s sabo vzel troje: križ, zaklad jezika in knjižico Prešernovih poezij. V Prešernu išče zavest slovenstva, in ker ima to, ima moč govoriti tuje jezike, se dotika vročih in mrzlih strojev in sploh obstane. Zadnje besede v knjigi so iz Prešernovega pisma Čelakovskemu: »Zdravi bodite in perporočite me per [...] perjatlih Slovenskiga jezika ...« (Papež, 1977, str. 159). V tem avtor na svoj način poudari svoje temelje, ki si jih deli z dobršnim delom svoje skupnosti v Argentini. Gre za vero, jezik in kulturo; in prav to so tisti elementi, ki so tej skupnosti omogočili, da je na oni strani oceana utrdila svojo skupnost, v kulturnem smislu pa ustvarila svojevrsten »čudež«. V Papeževem delu ne najdemo pritoževanja, obtoževanja ali sovražnosti – ne v zvezi s preteklostjo ne v zvezi z novo argentinsko

3 Slovenci so se med obema vojnama iz političnih razlogov in zaradi raznarodovanja množično izseljevali iz Primorske, ki je po prvi svetovni vojni pripadla Italiji. Za razliko od povojne emigracije je bila medvojna večinoma kmečkega in delavskega porekla ter načeloma naklonjena narodnoosvobodilnemu boju med vojno in socialistični Jugoslaviji po njej. Zaradi vseh teh razlik so bili stiki med obema skupnostma v Argentini omejeni, ne pa tudi neobstoječi (Žigon, 2001).

realnostjo. Kljub temu pa najdemo človeka, ki je zvest svojim načelom katoliškega pogleda na svet, domobranca, kritičnega do vseh nepoštenih političnih sistemov.

Hitro listanje po *Zapisih iz zdomstva* nas lahko napelje na misel, da gre za skupaj zbrane zapise, ki jih je avtor skozi življenje napisal za druge priložnosti in zbral v knjigi. Delno to drži, a je zapise precej preoblikoval (Jeločnik, 1977, str. 6).⁴ Gre za mozaično delo, ki prepleta spomine na vojna in predvojna leta v Sloveniji, emigracijo, izgradnjo povojne skupnosti v Argentini s poudarkom na Slovenski kulturni akciji, zapise iz sodobnosti izseljenskega življenja, slovenske, argentinske in druge ljudske zgodbe, premisleke o politiki, filozofiji, slovenskih in tujih literatih, podobe iz argentinske narave. Zapise skuša Papež zaključiti na vrhu, ko pripovedovano kar najbolj razvije. Predvsem kadar govori o težkih zgodovinskih ali političnih temah, pusti bralca v središču razvite misli, potem pa zaključi in v novem zapisu govori o drugi temi, ki je pogosto kontrastna s prejšnjo. Rdeča nit dela je vprašanje, kaj je zdomstvo – marsikateri zapis se začne z besedami »zdomstvo je ...« ali s čim sorodnim.

Papežev zapis je tako zaobjel izseljenstvo v vsej svoji kompleksnosti – vsak zapis nam odstre enega od vidikov. Teme si na nek način smiselno sledijo, bodisi kronološko bodisi glede na vsakdan in misli pripovedovalca: razmišlja na primer o Slovenski kulturni akciji in njenih težavah, udeleži se slovenskega dogodka, kjer sreča prijatelje, vsebina dogodka pa ga v mislih popelje v umišljeno domovino ali v spomine na vojno, zato potem predstavi enega od spominov na dom ali katerega od za skupnost pomembnih zgodovinskih dogodkov. Prav tako se zapisi na nek način stopnjujejo, zdi se, kot da so vedno bolj zreli in se pripovedovalec iz strani v stran stara – kot se hkrati tudi vedno bolj oddaljuje domovina (sprva se zdi, da spomini prihajajo sami od sebe, v zadnjem zapisu pa pravi: »[V] silnem naporu duha se dvignem v oni svet.«) (Papež, 1977, str. 157).

Bralca, pa čeprav ima ta le minimalno predznanje, na dobrohoten, neobsojač in nemilitanten način – delno so dogodki mitizirani, predstavljeni z metafizično noto, česar se je zavedal tudi sam (Jeločnik, 1977, str. 7) – pouči o slovenski povojni politični emigraciji: od kod prihaja, kako je videti, kakšni so njeni načrti za prihodnost, težave, idejni temelji – in kakšen je njen pogled na domovino. Papeževa pripovedna tehnika je realistična, z nenehnimi preskoki v času in temah ustvarja razburkano zgodbo zgodovine slovenskega izseljenstva. Tudi pri opisovanjih najtežjih dogodkov – taborišč, smrti, vračanja domobrancev v smrt – ostaja njegova pripoved tekoča, lahka, brez nepotrebnega balasta, čeprav opisuje dogodke, ki jih je sam doživel, ko je bil blizu smrti in ki so ga nedvomno zaznamovali. Mnoge navezave na druge avtorje (Proust, Balzac, Mauser, Prešeren, Eliot ...), s katerimi Papež pokaže svojo razgledanost, so skrbno izbrane in umestne. Delo je tako po vsebinski kot oblikovni plati kvalitetno.⁵

4 Primeri nekaterih preoblikovanih zapisov so »Metamorfoza« (*Meddobje*, 12(4)), »Aurakanija« (*Meddobje*, 12(1)) in »Fantje« (*Meddobje*, 14(4)).

5 Nekakšni *Zapisi iz zdomstva* v malem so Papeževa črtica »Borovci« (*Meddobje* 1979, št. 1), pri kateri gre zopet za avtobiografsko delo, v katerem se Papežev *alter ego* imenuje Matej Čelesnik.

NARATIV VRNITVE DOMOV

Le v enem svojem literarnem delu je Papež svojega junaka izseljenca poslal nazaj v Slovenijo. Gre za kratko zgodbo *Vrata* (Papež, 1984),⁶ ki je prav tako deloma avtobiografska, predstavlja pa avtorjevo fantazijo o vrnitvi v rojstne kraje. Jernej je izseljenec v zrelih letih, ki ga argentinsko podjetje pošlje z ekipo v Jugoslavijo. Biva v Ljubljani, na prost dan pa se odloči obiskati svojo vas Travniki v Beli krajini. Že na poti razmišlja, da odločitev ni bila pravilna, in misli na Buenos Aires. Vas je zapuščena, obisk pa v Jerneju sproži plaz spominov in čustev. Ta nehoteni plaz Papež označi z metaforo pergamenta spominov, ki ga ima vsak človek, a ga nekateri raje ne razvijejo in ne berejo, da ne podoživljajo bolečine. Jernej zapade v trans in se začne spominjati vojnih let, bojov med domobranci in partizani in svoje ljubezni po imenu Lucija, ki je padla kot partizanka. Zaradi stresa se onesvesti in se prebudi šele naslednji dan. Zgodba se konča z negativnim simbolom okrvavljenih cvetov s kosci oblačil. Zapisano je neke vrste svarilo tistim izseljencem, ki bi si želeli obiskati dom. Na začetku pripovedovalec opozori, da vrnitev ni priporočljiva za tiste, ki nosijo v srcu težke spomine na domače čase, prav tako je vrnitev stvar načelnosti, in sploh se »v oni svet ni mogoče vrniti brez škode«. »Ranjeno srce izseljenca more obstajati le v miru, v toplem družinskem združenju narodnostnem okolju. In kako je važno pri tem pravilno sprejemati ameriški tostrani svet!« (Papež, 1984, str. 43). Zgodba je pomenljiva v smislu, da se za avtorja zdi prava pot gojiti umišljeno domovino, živeti v novem svetu in se ne vračati – saj tam ne čaka nihče, ruševine rojstne vasi pa je preraslo rastlinje. Kot je pokazala Dagmar Gramshammer-Hohl (2017), je narativ vračanja domov načeloma vedno narativ negativnih čustev in poloma, in podobno je tudi pri Papežu.

PAPEŽEVA POEZIJA – VRATA V OČETNJAVA

Pogled na domovino je zagotovo lažje analizirati preko proznih del, a največja kvaliteta Papeževega dela je v njegovi poeziji. Pred sabo imamo poezijo v preprostem jeziku, ki pa uspe izvrstno ubesediti bivanje človeka (izseljenca ali kogar koli drugega). Pritrdimo lahko Papeževi oznaki sebe in njemu podobnih pesnikov (po njegovem gre za taboriščnike, torej generacijo slovenskih izseljenskih pesnikov, ki so začeli pisati v begunskih taboriščih): »Njihova pot drži predvsem proč od romantike, proč od domotožja, potrtosti in deklarirane poduhovljenosti« (Papež, 1985b, str. 9). Gre za optimistični religiozni eksistencializem, ki, kot smo že pokazali, izrazito preveva Papežev opus. Pesniški izraz je nazoren in nedvoumen, čeprav prehaja (po pesnikovih besedah) nenehno v globljo, celo metafizično ekspresivnost.

V nadaljevanju bom umišljeno domovino analiziral še preko izbora njegove poezije iz obeh zbirk in objav v *Meddobju*. »Govorjenje« v njegovi prvi zbirki *Osnovno*

6 V redkih pesmih sicer fantazira o vrnitvi domov, a do nje nikdar ne pride.

govorjenje (1957) je res osnovno, preprosto, brez »balasta« vsega, kar je skupnost doživela. Papeža zanima položaj tukaj in zdaj, a se ne pozabi zazreti v preteklost. Tri komponente, ki so hkrati trije deli zbirke, bi bile težko ubesedene preprosteje: Stvari, Ljudje, Čas. Pogled domov se lirskemu subjektu zgodi predvsem ob posebnih priložnostih, verskih ali kulturnih dogodkih. Tako v pesmi *Vrnitev v Pepelnici* umišljena domovina predstavlja miren kraj: »[P]o veselju in žalosti /se vrača duša domov, /kjer stvari ne žaré /kjer so barve umirjene /in besede preproste.«

Kadar se v poeziji ozira nazaj, pesnik omenja le malo konkretnega; vse so bolj misli, vtisi, drobci. Pesmi »Tri fare«, »Sv. Frančišek« in »Žeželj« so naslovljene po belokranjskih romarskih cerkvah – prav spomini na romarske shode lirski subjekt v težkih trenutkih pomirjajo. Poleg teh podob izseljenca pomirja beseda, kajpak domača: »V teh dneh rešujejo navadne besede, /nekaj podob rešuje, ki se vračajo v nočeh, /nekaj določenih krajev, /kamor se more zateči srce, /ko so valovi tišine največji in osamelost najbolj nasičena« (»Priprava na zdravljenje«). Podobno je v pesmi »Odločenost za prehod«: »Misli počivajo med spomini na smeh in domačnost, / hranijo se v delu in grajenju, / v potrpežljivem čakanju.« *Hommage* mestu pesnikove mladosti, Črnomlju, je pesem s istim naslovom. Tudi v njej razloži svojo umetniško in življenjsko pozicijo. Mesto je zanj podoba življenja. Življenje se umiri, kot mesto, ko ga zmoči obilen poletni dež. Med vojno je bilo mesto utrjeno, njegove zveze z okolico pa pretrgane. Predzadnja kitica je klic k bratski spravi, zadnja pa prinese streznitev: »Zdaj sedim na stopnicah ob morju / (ko da bi sedel spodaj pri reki, / med listjem, travo in kamenjem). /V očeh raste sedanost – /ni drugih možnosti časa. /A to samo za trenutek in na tem kraju. /Drugje – v mestu – ko je bilo mesto kot jaz, /je bila sedanost v istem trenutku preteklost /in polna možnosti za bodočnost« (»Črnomelj«).

V spremni besedi k *Dvema svetovoma*, ki že v naslovu upesnjujejo dvojnost, avtor pravi, da je zbirka produkt njegove razpetosti med dva geografska svetova (slovenskega in ameriškega) in dva časa (sedanost in preteklost). Oba svetova se v vsaki pesmi prepletata: »povsod navzoča slovenska zemlja, ljudje, zgodovina, revolucija in trdo delo za vsakdanji kruh v novem svetu« (Papež, 1985a, str. 3). Kopica motivov iz *Zapisov iz zdomstva* se ponovi v poeziji (oziroma obratno): na neki način so lahko *Zapisi* ključ za ugotavljanje, od kod kakšen izmed motivov v pesmih. Primer je večkratno omenjanje cvetov in poti, po katerih je šel v domovini (na primer v pesmi »Daleč«: »Tako daleč še nisem bil nikdar /in vendar mislim na prvi svet, /na prve cvetoče travnike, /vrtove /in poti, /po katerih smo šli [...]«). Jasno je, da je Papež ljubil naravo in jo poglobljeno doživljal, motiv poti in cvetja pa si deli s Proustom. Dvojnost pampske in belokranjske narave, v družbi z vsemi drugimi dvojnostmi, je zelo pogosta. Pri tem je zelo močan motiv sonca, ki dobiva simbolične razsežnosti, v pesmi »Poletje« takole: »Bilo je poletje, /davno in visoko poletje /v slovenskem svetu; /nekdanja svetloba, /čas zdravja in rož, /travnikov pokošenih, /stezá po gozdovih, /ljubezni in hrepenenja. /Sonce, /ki v meni še ni zašlo –, /spet ga gledam /v daljnem poletju tega zdomstva.«

V uvodni pesmi »Dva svetova« pravi, da je treba v *terra australis* prinesiti dosti domovine in spominov, če želiš tam obstati. Zanj so to, kot beremo skozi različne pesmi, jezik, kultura, vera, običaji v duhovnem smislu, hkrati pa je lirski subjekt iz domačega kraja prinesel pest zemlje, dobil domačo trto in kamen, ki ga je zakopal na vrtu pred hišo v Carapachayu (del aglomeracije velikega Buenos Airesa). Tam je ustvaril tudi pesem »Moj svet«: »Tu sem si postavil dom /in uredil vrt, /ki sem ga v desetletjih poslovenil, /obdal z grmovjem, plezalkami in bršljanom; /določil sem mejo, /tako, da je vse, kar je v vrtu, moje – /[...] /in kamor se sonce upira /sem zasadil trto iz Maverlena /[...] /kamen sem vkopal /[...] /in nenadoma se mi drevje zgosti, /če se približam zvečer: /spet sem v gozdu nad Črmošnjicami [...].« Skoraj stereotipni prizor slovenskega ograjenega vrtička, kjer je vse *moje*, je realizacija umišljene domovine na domačem vrtu, ki jo lahko opazujemo v marsikaterem izseljenškem domu (domačem in društvenem). V širšem smislu lahko to povežemo s pesmijo »Biti zdoma«, kjer je dom lirskega subjekta *domači vrtiček* znotraj prostrane Argentine: »Imam svoj dom, /priboril sem si ga /in se zajedel v to širno zemljo kot črv. Zame je Amerika nekaj drugega: / je celina, ki obkroža *moj* dom.«⁷

Govoriti, se pravi pesniti, pomeni vračati se iz tujine. »Vsaka beseda je most, ki me bliža domačiji« (»Govorim«). Prav tako je vračati se domov napraviti božično okrasje iz smrekovih in borovih vej (»Vsako leto«), se po delovnem tednu v buenosaireški tovarni ob nedeljah družiti s tovariši v Argentini, kar spominja na vaška druženja ob nedeljah (»Nedelja«). Papežev paradoks je v tem, da sicer zatrjuje, da v polnosti živi v sedanjosti argentinske realnosti, obenem pa se vseeno oklepa preteklosti. Eden dokazov za to je, da hrani nekaj oblek izpred vojne (»Predvojni čas«); da mu to predstavlja simbolično dejanje, je razodel tudi v *Zapisih*. V isti pesmi pravi, da so prav vse njegove knjige še izpred vojne in da novih ne kupuje.

V majhnem delu svojega opusa Papež pogleda še v naslednjo generacijo. Zaveda se, da bo domovina otrok njegovega rodu Amerika, čeprav bodo v očeh staršev Slovenci, in upa, da bodo to identiteto ohranili tudi oni (»Naš rod«). Prav tako se zaveda, da bodo šele njegovi otroci tisti, ki se bodo v Slovenijo lahko zares (neobremenjeno) vračali. Pesem »Pismo« upesnjuje pismo materi v Slovenijo, v katerem se ji zahvaljuje, da so ga lepo sprejeli. Ta motiv se pri Papežu pojavi le v tej pesmi in na neki način sklepa njegovo misel o potovanju in vrnitvi, ki jo bodo lahko uresničili šele njegovi otroci.

7 Beseda v kurzivu je taka v originalu, kar nas zopet napelje na že omenjeno »stereotipno« slovensko.

SKLEP

Umišljena domovina je, vsaj po merilih, ki sem jih postavil po Rushdieju, med slovenskimi izseljenskimi pisci prav pri Francetu Papežu med najbolj razvitimi. Geografsko gre za Belo krajino z obronki Dolenjske, kjer je Papež preživel mladost in del vojnih let. Dom so zanj domačije teh krajev, s katoliškimi nazori navdahnjeno kmečko življenje z običaji, delom in romanji, še bolj pa tamkajšnja narava, s katero je globoko povezan in ji v Argentini ves čas išče vzporednice. V pesmi »Če bi« pravi, da če bi se imel možnost vrniti, bi se želel v prvi vrsti vrniti prav v to belokranjsko naravo. V pesmi »Odkritje« pravi, da je Slovenija zanj največji zaklad, česar pa se je najbolj zavedel v argentinskih krajih. Slovenijo primerja z umetnino, ki jo je v tujini očistil in *renoviral*. Ravno v tej metafori se skriva umišljena domovina – njena časovna komponenta je v času pred drugo svetovno vojno, delno še med njo. Gre torej za drobce domovine, ki so jih izseljenci prinesli s sabo; v duši so nosili umišljeno domovino, fizično pa so jo tudi gradili na domačih vrtovih in v skupnih domovih.

Mnoga Papeževa literarna dela črpajo navdih iz dvojnosti med življenjem v Argentini in umišljeno domovino. Vse, kar je doma nastalo po emigraciji, ga ne zanima. Ne kupuje novih knjig, slovenska književnost, nastala v matici, ki zanj kaj šteje, je nastala pred drugo svetovno vojno. Ob morebitni vrnitvi domov bi ga pričakala le še ta narava, dragih ljudi ne bi bilo več, rojstna vas v bolečinah pa bi mu prinesla le bolečine. Umišljeno domovino vedno znova reflektira in si ne dela utvar o njeni idealnosti, zanj je to bil dom – težek kraj lepega in grdega, a dom. O nasprotni strani v državljanski vojni, kot tudi o povojni Sloveniji, govori brez zamer, a se jasno opredeli, da to ni več povsem njegova domovina (domovina je to slovenstvo v Argentini in predvojna Slovenija – vrniti se v to novo bi bilo boleče in nenačelno). Slovenska povojna migracija v Argentino je zanj torej Slovenija v malem, domovi po Buenos Airesu odmevi belokranjskih vasi. V izseljenstvu je po njegovem mogoče solidno živeti, le delati je treba, se družiti, ohranjati vero in slovensko kulturo. Izseljenstvo zanj ni stanje, je pot, ki se bo sklenila z vrnitvijo – pa čeprav jo bo izvedel še drugi rod.

Po tipologiji Svetlane Boym gre pri Papežu za nekakšno dvojnost. Osebo občuti refleksivno nostalgijo. Sanja, idealizira domovino, pravzaprav skoraj izključno domače kraje in tamkajšnjo naravo. Želi se vrniti, a odhod odlaša, do stare domovine vzdržuje distanco in se skuša vživeti v novo – to vživljanje je zanj *élan vital* in navdih za pisanje. Njegovo družbeno delovanje je bolj na strani rekonstrukcijske nostalgije, saj je »Slovenija«, kot jo s sonarodnjaki uprizarjajo v obliki domov v Argentini, ukrojena po njihovem političnem in verskem prepričanju in v resnici ni nikoli obstajala; razmeroma patriarhalen svet katoliških vrednot v trdnem prepričanju, da je njihova pot prava.

Kar zadeva kvaliteto Papeževega dela, naj sklenem z besedami Helge Glušič: »France Papež je slovensko besedo obogatil s filozofijo upanja in močne volje za neboleče sprejemanje tujega sveta ter s pogledom na lepoto južnoameriške pokrajine« (Glušič, 2001, str. 194).

VIRI IN LITERATURA

- Avsenik Nabergoj, I. (2005). Hrepenenje po domovini v poeziji slovenskih avtoric v zdomstvu. *Dve domovini / Two Homelands*, 21, 125–135. <https://www.dlib.si/details/URN:NBN:SI:doc-X2O7O4VL>
- Boym, S. (2001). *The future of nostalgia*. Basic Books.
- Dobrovoljc, H. (1999). Na zdomski poti Franceta Papeža: (oris literarnega ustvarjanja). *Meddobje*, 33(1/2), 99–125.
- Glušič, H. (1999). France Papež. *Slovenska izseljenska književnost*, 3, 344–345.
- Glušič, H. (2001). Spremna beseda. V F. Papež, *Izbrane pesmi* (Zv. 5, str. 179–195). Mohorjeva družba.
- Gramshammer-Hohl, D. (2017). Exile, return and “the relative brevity of our life”: Aging in Slavic homecoming narratives. Nabokov – Kundera – Jergović. V D. Gramshammer-Hohl (ur.), *Aging in Slavic Literatures* (str. 185–202). Transcript Verlag. <https://doi.org/10.1515/9783839432211>
- Grdina, I. (1990). *Besede so ostale kot semena: izbor iz poezije slovenskega zdomstva*. Univerza v Ljubljani.
- Jeločnik, N. (1977). France Papež in Nikolaj Jeločnik se pogovarjata o Zapisih iz zdomstva. *Glas SKA*, 11–12, 6–8.
- Laurušaitė, L. (2015). The imagological approach to Lithuanian and Latvian contemporary émigré narratives. *Interlitteraria*, 20 (1), 168–181. <https://doi.org/10.12697/IL.2015.20.1.13>
- Mélat, H. (2002). Andreï Makine: Testament français ou Testament russe? *La Revue russe*, 21, 41–49.
- Papež, F. (1977). *Zapisi iz zdomstva*. Slovenska kulturna akcija.
- Papež, F. (1984). Vrata. *Meddobje*, 20(1/2), 40–49.
- Papež, F. (1985a). *Dva svetova*. Slovenska kulturna akcija.
- Papež, F. (1985b). Spremna beseda. V T. Debeljak in F. Papež (ur.), *Antologija slovenskega zdomskega pesništva* (str. 5–15). Slovenska kulturna akcija.
- Pogačnik, J. (1972). *Slovensko zamejsko in zdomsko slovstvo*. Zaliv.
- Proust, M. (2022). *Iskanje izgubljenega časa: 1, V Swannovem svetu*. (Elektronska izdaja). Beletrina.
- Rot, A. (1994). *Republika duhov: štiridesetletnica Slovenske kulturne akcije*. DZS.
- Rushdie, S. (1992). *Imaginary homelands: Essays and criticism 1981–1991*. Penguin Books.
- Williams, E. (2022). *The portrait of a homeland: An analysis of the image of Sweden and Swedish poverty in the Swedish American Post, year 1887*. [Master's thesis, Malmö University].
- Žigon, Z. (2001). *Iz spomina v prihodnost: slovenska politična emigracija v Argentini*. Založba ZRC, ZRC SAZU.
- Žitnik Serafin, J. (2014). Vloga izseljenske/priseljenske književnosti in literarne vede pri raziskovanju migracij. *Dve domovini / Two Homelands*, 39, 31–42. <https://www.dlib.si/details/URN:NBN:SI:DOC-EPYXAN94>

SUMMARY

THE IMAGE OF THE HOMELAND IN THE WORKS OF FRANCE PAPEŽ Urh Ferlež

France Papež, a Slovenian postwar émigré writer based in Argentina, explores themes of exile, dual identity, and existential reflection in his literary works, presenting a nuanced portrayal of the émigré experience. Drawing on Salman Rushdie's concept of the "imaginary homeland" and Svetlana Boym's typology of nostalgia, the article shows that Papež's image of the homeland is shaped by memories of Slovenia before World War II, emphasizing the importance of preserving language, culture, and faith while adapting to new environments. Born in Bela Krajina in 1924, Papež experienced the turbulence of WWII and eventually emigrated to Argentina, where he contributed to the Slovenska kulturna akcija (Slovenian Cultural Action) and authored significant works, including *Osnovno govorjenje* (1957), *Dva svetova* (1985), and *Zapisi iz zdomstva* (1977). His writing, especially *Zapisi iz zdomstva*, blends personal, historical, and cultural narratives, portraying Slovenia as both a physical and spiritual homeland. Papež critiques political extremism, reflects on dual identity, and captures the tension between his Slovenian roots and his Argentinian present. His poetry complements his prose, using vivid imagery and simple, profound language to bridge his memories with his present life, often through symbolic landscapes, religious motifs, and cultural elements. While his personal nostalgia remains reflective, celebrating memories without idealizing them, his communal efforts align with restorative nostalgia, striving to recreate Slovenian traditions in exile. Ultimately, Papež's works highlight the resilience of Slovenian culture abroad and affirm the enduring significance of the "imaginary homeland" for displaced individuals, offering a compassionate and introspective exploration of exile and identity.

RUSKI GENERAL IVAN T. BELJAJEV V ZELENEM PEKLU

Maja Ramuš¹

COBISS 1.01

IZVLEČEK

Ruski general Ivan T. Beljajev v Zelenem peklu

Avtorica v prispevku združuje pomembne špansko, portugalsko in angleško govoreče vire o vojni za Chaco in med njih umešča ruske vire o ruskih priseljencih v Paragvaju v 20. in 30. letih 20. stoletja. Med njimi je bil najpomembnejši bivši ruski general Ivan T. Beljajev, ki je prvi začel postavljati temelje za moderni vojaški obrambni načrt, ključen za kasnejšo zmago Paragvajcev proti Bolivijcem v vojni za Chaco. Še pred izbruhom vojne je raziskal celotno pokrajino Chaco ter zgradil prvi most med staroselskimi plemeni in paragvajsko vlado. Med vojno je bil svetovalec vrhovnega vojaškega generalštaba in okoli njega se je izoblikovala močna priseljska ruska skupnost, ki je pustila pečat vse do danes.

KLJUČNE BESEDE: Paragvaj, Bolivija, vojna za Chaco, ruski priseljenci, staroselci

ABSTRACT

Russian General Ivan T. Belaieff in the Green Hell

The article brings together important Spanish-, Portuguese-, and English-language sources on the Chaco War and sets them alongside Russian sources on Russian immigrants in Paraguay in the 1920s and 1930s. The most important among them was the former Russian general, Ivan T. Belaieff, who began laying the foundations for a modern military defense plan that proved crucial to Paraguay's later victory over Bolivia in the Chaco War. Even before the war, he explored the entire Chaco region and built the first bridge between Indigenous tribes and the Paraguayan government. During the war, he served as an advisor to the Supreme General Staff, and a strong Russian immigrant community formed around.

KEYWORDS: Paraguay, Bolivia, Chaco War, Russian immigrants, Indigenous people

¹ mag. prof. zgod. in mag. prof. rus.; Univerza v Ljubljani, Filozofska fakulteta; ramus.maja@gmail.com; ORCID: <https://orcid.org/0009-0008-3261-1312>

UVOD

V 20. stoletju je bila Južna Amerika prizorišče številnih političnih, družbenih in vojaških prelomov, med katerimi je vojna za Chaco (1932–1935) med Paragvajem in Bolivijo eden najbolj zapomnljivih in tragičnih. Ta danes povsem neznana vojna se je končala s paragvajsko zmago, kljub temu, da je imela Bolivija pred izbruhom vojne skoraj tri milijone prebivalcev, Paragvaj pa le slab milijon. Po besedah britanskih diplomatov v La Pazu je bila vojna za Chaco primerljiva »z Evropo leta 1914, s Paragvajem kot Srbijo, Bolivijo kot Avstro-Ogrsko in Argentino kot Rusijo« (Trejo, 2019, str. 39, 412). V Boliviji naj bi med bojem padla 2 % prebivalstva (okoli 65 tisoč vojakov), v Paragvaju pa približno 3,5 % prebivalstva (okoli 36 tisoč vojakov). Na obeh straneh so vojskama pomagali evropski vojaški najemniki. V Paragvaju so bili to bivši ruski carski oficirji, v Boliviji pa nemški vojaki, pri čimer so oboji že imeli izkušnje iz front v prvi svetovni vojni. V praksi so bile lahko v pokrajini Chaco preizkušene nove taktike vojskovanja, ki so jih razvijali med obema svetovnima vojnama, na primer bliskovit napad z vojaškimi letali, gverilsko bojevanje in motorizirana pehota (Rodrigues Peixoto, 2018, str. 39). Kljub temu pa ta dogodek danes pozna le ožji krog zgodovinarjev (Rout, 1970, str. x).

V središču tega konflikta so se znašli na prvi pogled nepričakovani akterji: ruski migranti, ki so v tem obdobju našli svoj novi dom v Paragvaju. Latinska Amerika je v poznem 19. stoletju že postala privlačna za milijone priseljencev. Drugi val so predstavljali politični migranti po letu 1918, ki so večinoma bežali pred boljševiki v Argentino, Brazilijo, Čile, Mehiko in tudi v Paragvaj (Naumov, 2014, str. 174, 225), množične premike ruskega prebivalstva pa je povzročila tudi februarska revolucija na začetku 20. let 20. stoletja. Ob koncu državljanske vojne je bila celotna bela carska armada izgnana iz nove Sovjetske zveze ali ujeta, vse povezano s carsko družino in starim monarhičnim redom pa izbrisano. Na drugi strani je imela paragvajska vlada tradicijo privabljanja vojaških strokovnjakov iz Evrope že od poraza v vojni s trojnim zavezništvom naprej leta 1870 (Rodrigues Peixoto, 2018, str. 58).

Ruski priseljenci, ki so bežali pred boljševiki po koncu ruske državljanske vojne, so se v Paragvaju znašli v edinstvenem položaju, s protirevolucionarnim generalom Ivanom Timofejevičem Beljajevim na čelu, ki je imel vpliv tudi na pomembno slovensko antropologinjo Branislavo Sušnik. Slednja naj bi prvotno prišla v Paragvaj prav zaradi njega in njegovih antropoloških raziskav, se tam spoznala z domorodci ter kasneje nadaljevala njegove raziskave. Beljajevova prisotnost in vloga v kontekstu vojne za Chaco sta v obstoječi literaturi pogosto prezrti, zato ta vidik ostaja marginaliziran v sodobnem zgodovinoopisu in kolektivnem spominu. Pri iskanju literature je bilo ugotovljeno kritično splošno pomanjkanje historiografskih virov, saj je akademške študije, ki objektivno in kritično obravnavajo potek vojne, zelo težko najti. Paragvaj je še danes zelo zaprta država. Večina knjig paragvajskih in bolivijskih avtorjev, ki so izšle v obdobju 30 let po vojni, je avtobiografske narave. Najti je mogoče le nekatere redke knjige in članke ameriških, argentinskih, brazilskih in španskih

raziskovalcev, med katerimi je velika večina starejših od 30 let. Nasprotno pa je na voljo manjše število knjig o prisotnosti ruskih priseljencev, ki so migrirali v Paragvaj pred in med vojno – večinoma posameznih ruskih raziskovalcev, ki so se s to temo začeli ukvarjati šele po razpadu Sovjetske zveze. Med njimi so bili ruski zgodovinarji, kot so Boris Martynov s knjigo *Ruski Paragvaj* (rus. *Ruskij Paragvaj*), Sergej Nečajev s knjigo *Rusi v Latinski Ameriki* (rus. *Russkije v Latinskoj Amerike*) in Nikolaj Starikov z najnovejšo objavo dnevnikov Ivana Beljajeva. Vse uporabljene ruske knjige in članki so bili dostopni na svetovnem spletu, razen arhivskega gradiva Ivana Beljajeva, ki ga hranijo v rokopisnem skladu GBIL oz. Leninovi knjižnici v Moskvi.

Številni obravnavani pisni viri o vojni za Chaco so bili najdeni v fondih knjižnice Univerze v Granadi (Biblioteca UGR), mestne knjižnice Biblioteca de Andalucía, knjižnice Univerze v Huelvi (Biblioteca Central Ibn Hazm), knjižnice Mednarodne Univerze v Andaluziji (Biblioteca Sede de La Rábida, Universidad Internacional de Andalucía) ter knjižnice Escuela de estudios hispano-americanos (CSIC) v Seville (La Red de Bibliotecas y Archivos del Consejo Superior de Investigaciones Científicas).

Namen članka je pojasniti vlogo ruskih priseljencev v 20. in 30. letih v Paragvaju v kontekstu vojne za Chaco s premagovanjem jezikovnih ovir, v njem pa so uporabljeni tako rusko govoreči kot špansko, portugalsko in angleško govoreči viri. Predvsem pa želim z razpravo slovenski javnosti približati spopad v »Zelenem peklu« in življenje generala I. T. Beljajeva.

RUSKI GENERAL

Ivan Timofejevič Beljajev se je rodil leta 1875 v ugledni ruski družini z bogato zgodovino. Sledil je svojim dedoma, očetu – slavnemu ruskemu generalu Timofeju Mihajloviču Beljajevu – ter svojim bratom v vojaški poklic, kljub temu, da je bil kratkoviden in ga po pravilih ne bi smeli sprejeti v vojsko.¹ Imel je naravni talent za topove, tuje jezike in predvsem za jahanje (Martynov, 2006, str. 8–17, 20). Že po prvem obisku Kavkaza je s prvimi raziskovalnimi študijami o kavkaških ljudstvih pokazal svojo strast do geografije in etnografije, in sicer do te mere, da je bil sprejet v carsko geografsko društvo. Pogumno se je boril na frontah prve svetovne vojne na Karpatih in v Brusilovskem preboju. Leta 1917 je Beljajev v činu generalmajorja kljub nemirom zvesto verjel v carja in ni sprejel oblasti boljševikov (Beljajev, 2015, str. 2). Tako se je znašel na strani poražencev in se skupaj z ostanki carske armade ruskega generala Pjotra Wrangla premikal proti jugu Ruskega imperija ter sledil valu evakuacije iz Odese v Istanbul. Od tam ga je pot zanesla v Egipt, Pariz in nazadnje v Južno Ameriko (Martynov, 2006, str. 92).

1 Zelo podrobno o družinskem drevesu Ivana T. Beljajeva piše Boris Martynov v knjigi *Ruski Paragvaj*.

Februarja 1923 je skupaj z ženo iz Rotterdama najprej priplul v Argentino (Chesterton & Isaenko, 2014, str. 615). Ta država je v 20. letih 20. stoletja s svojo multikulturno družbo, ki se je iz leta v leto večala, že slovela kot raj za priseljence. Leta 1889 je bila v Buenos Airesu ustanovljena prva pravoslavna cerkev v krščanski Južni Ameriki (Martynov, 2006, str. 6, 93). Že naseljeni ruski priseljenci si niso želeli pokvariti svojega priborjenega privilegiranega položaja, zato novi prišleki niso nalteli na preveč topel sprejem in obilo priložnosti za zaslužek (Beljajev, 2015, str. 288). Beljajevu je Hrvat doktor Fontana ponudil službo učitelja francoščine in nemščine na manjši šoli (Beljajev, 2015, str. 288). V prostem času je izpopolnjeval svoje znanje španščine ter pod psevdonimom »Juan Belaieff« v časopisih objavljial eseje o revoluciji in državljanski vojni (Nečajev, 2010, str. 49). Predvsem si je želel najti novo mesto, kjer bi lahko ohranjal rusko tradicijo (Martynov, 2006, str. 288).

PARAGVAJSKI GENERAL

Po neprijaznem odnosu ruske skupnosti do njegove zamisli o ruski koloniji ter brez perspektive za zatočišče za brezdomne ruske protirevolucionarne priseljence v Argentini, ki bi ohranjali vrednote in tradicijo Ruskega imperija, se je Beljajev znašel na paragvajski ambasadi v Buenos Airesu (Beljajev, 2015, str. 290). Prvič so ga v Paragvaju zaradi političnih nemirov samo odslovili, saj je med letoma 1922 in 1923 tam potekala druga državljanska vojna med dvema frakcijama liberalne stranke. Podporniki nekdanjega vojaškega poveljnika Adolfa Chirifa so neuspešno poskušali izvesti vojaški udar. V eno leto trajajoči vojni so jih ustavili podporniki, ki so podpirali bivšega predsednika Manuela Gondra in njegovega naslednika Eusebia Ayalo (Vicens Vives, 1972, str. 191). Tako sta konec leta 1923, ko se je politični nemir v Paragvaju umiril, Beljajeva na paragvajski ambasadi v Argentini lepo sprejela Manuel Gondra in vojaški agent Sanches. Všeč jim je bila ideja naselitve sposobnih Rusov v državi, in Beljajev je kljub dejstvu, da je bila to precej revna država, sprejel ponudbo za delovno mesto učitelja v vojaški šoli, kjer je predajal znanje o vojaških utrdbah in učil francoščino. Marca 1924 je prvič prispel v Asunción in začel predavati kadetom (Martynov, 2006, str. 98, 99). Bivši ruski general je bil že po treh mesecih poklican k vojnemu ministru Louisu Riartu, kjer je dobil dovoljenje, da razpošlje povabila dvanajstim izbranim ruskim vojaškim strokovnjakom z različnih področij brez povezav z Rdečo armado (Beljajev, 2015, str. 291). Tako se je v beograjskem časopisu *Novo vreme* pojavil poziv k prihodu v Paragvaj vsem tistim, »ki sanjajo o življenju v državi, kjer bi se lahko imeli za Ruse« in »kjer ljudje iz izkušenj vedo, da se Feniks ponovno rodi iz pepela«. Istočasno je Beljajev aktivno iskal zemljo, ki bi bila primerna za uresničitev njegove ideje o t. i. Ruskem domu.² Precej prazno območje Chaca se mu je

2 Izvorno *Ruskij očag*. Ruska beseda *očag* ima več pomenov in jo je v tem kontekstu izjemno težko prevesti. Pomeni lahko namreč ognjišče, dom, prebivališče, središče nečesa ali vir nečesa.

kazalo kot dobro potencialno zemljišče za naselitev nove ruske kolonije (Martynov, 2006, str. 52, 103). Z idejo o ustanovitvi miroljubne in domoljubne organizacije je želel spodbuditi rusko priseljevanje v Paragvaj ter preprečiti smrt ruske kulture in ruskega duha, z upanjem, da se bodo otroci ali vnuki tistih, ki so se borili proti boljševizmu, nekoč lahko vrnili v Rusijo (Muhačov, 2016, str. 98, 99, 100).

Oktober 1924 so mu bile dodeljene specifične naloge za vojaško-etnografsko raziskovalne odprave v regijo Chaco. Njegova ključna naloga je bila pripraviti obrambni načrt in popisati teren zaradi možnosti resnega vojaškega spopada z Bolivijo (Beljajev, 2015, str. 291). Bil je zadolžen za pripravo splošnega zemljevida celotnega območja, določitev območij, ki bi bila najboljša za organizacijo dolgoročnih obrambnih struktur, seznam vseh plemen in naselij z oceno »moralnega stanja«, skrb za zdravje plemen s cepljenjem proti nalezljivim boleznim in epidemijam ter na koncu za izdajo obširnega poročila za Ministrstvo za obrambo s približnim izračunom obsega potrebnih novogradenj za obrambo. Imel je vso svobodo in vsa pooblastila. Beljajev se je resno lotil naloge, kljub govoricam o ljudožerskih plemenih, zvereh in nevarni naravi. V preteklosti so med raziskovalnimi odpravami v Chacu izginile vsaj tri odprave tujih raziskovalcev. Poleg velikih temperaturnih nihanj med dnevom in nočjo so bile glavne težave predvsem pomanjkanje pitne vode, zastareli raziskovalni instrumenti, slabi konji ter pomanjkanje osnovnih reči, kot so hrana, strelivo, vžigalice in zdravila (Martynov, 2006, str. 105, 107, 108). Iz njegove korespondence s paragvajskim Ministrstvom za obrambo konec leta 2024, ki je danes shranjena v zasebni zbirki v Asunciónu, je razvidno, da je bil Beljajev prepričan, da je to ozemlje mogoče prehoditi in popisati, saj med drugim piše, da je »v nasprotju s splošno sprejetim mnenjem to ozemlje skoraj povsod prehodno« (Chesterton & Isaenko, 2014, str. 625). S svojim poznavanjem tradicij in navad staroselcev v Chacu je z njimi spletel močno vez. Spoštovali so ga in ga imenovali *Elebyk* oziroma »Močna roka« (Nickson, 1993, str. 318).

Beljajev je regijo zelo cenil in ni imel predsodkov, ki so jih do Chaca gojili Paragvajci. Danes mu pripisujejo zasluge, da je v Paragvaj prinesel novo percepcijo o staroselskih ljudstvih in »njihovo mesto v moderni nacionalni državi«, saj je vlekel vzporednice med Chacom in Kavkazom. Promoviral je ideologijo vključevanja »divjih« Gvaranov v paragvajsko državo. Cilj je bil, da bi lovce-nabiralce spreobrnili v sposobne kmetovalce ter s tem v spoštovane državljane (Chesterton & Isaenko, 2014, str. 627). Zavzemal se je za ustanovitev »indijanske« konjenice za obrambo (Richard, 2008, str. 305). Tako bi lahko staroselci igrali isto vlogo kot Čečeni ali Čerkezi na Kavkazu za časa turških vpadov (Chesterton & Isaenko, 2014, str. 619).

Ob uspešni vrnitvi je v poročilu z etnografsko, topografsko in vojaško analizo za ministrstvo v Asunciónu, ki je bilo kasneje uporabljeno kot osnova za paragvajsko strategijo v vojni, poudaril, da bo v primeru vojne ključno imeti vir pitne vode, zaradi česar so bile zelo pomembne poti do naravnih rezervoarjev, lagun in indijskih vodnjakov ter izkušeni izvidniki. Brez naštetega preživetje v regiji le nekaj kilometrov stran od reke ni bilo mogoče, še manj pa zmaga v potencialni vojni. Prav tako

je opozoril na temeljno spreminjajočo se naravo regije Chaco, saj se lahko puščava v sekundi spremeni v poplavljeno območje, pred katerim se človek ne more nikjer skriti, in obratno, ter potrebo po aktivni obrambi. Do konca leta 1930 je Beljajev izvedel dvanajst uspešnih odprav v Chaco in dokumentiral celotno ozemlje (Martynov, 2006, str. 107, 108, 630).

Zadnja, trinajsta odprava leta 1931 se je izkazala za najpomembnejšo, saj se je Beljajevova devetčlanska skupina znašla v časovni tekmi z bolivijskimi raziskovalci (Chesterton & Isaenko, 2014, str. 625). Šlo se je za legendarno sladkovodno jezero Pitiantuta ali Chuquisaca na severu, ki je bilo ključnega strateškega pomena in je zagotavljalo pitno vodo v suhih zimskih mesecih (Martynov, 2006, str. 112–120). Naloga se je izkazala za zelo težavno, saj ga do tedaj ni našel še nihče razen nekaterih staroselcev. Ekspedicija Beljajeva se je po velikih naporih izkazala za uspešno, in zemljevid Pitiantute je bil velika prednost pred Bolivijci, ki so jezero dokumentirali šele leto kasneje (Richard, 2008, str. 295, 327). Paragvajski poveljnik C. J. Fernández kot eden redkih omenja Beljajeva v prvem delu svoje trilogije *La guerra del Chaco* iz leta 1956 z naslovom *Boquerón*:

Če se bo ruski general Juan Belaieff kdaj odločil objaviti svoje spomine, ki jih je že napisal, o raziskovanjih v notranjosti Chaca, ki so se začela leta 1924, bi postale znane stiska, žrtev in nevhvaležnost, ki jih je moral prenašati, ker se ga je [jezera Pitiantuta] polastil, zaradi svoje trmoglavosti, ko je želel zasesti Veliko laguno pred Bolivijo. Še več, želel je spremeniti staroselce (domačega agenta samega Chaca) v naše najboljše zaveznike proti bolivijskim zavojevalcem. General Belaieff, prvi beli Rus, ki je služil nacionalni stvari, si upravičeno zasluži uradno priznanje in paragvajsko hvaležnost. (Fernández, 1956, str. 67, 68)

RUSKA SKUPNOST V PARAGVAJU

Po letu 1924 je v državo prispelo prvih 12 bivših ruskih carskih oficirjev (Beljajev, 2015, str. 53). Ti so ustvarili osnovo za nadaljnje priseljevanje in sprožili učinek snežne kepe. Pripravili so teren za več kot 70 protirevolucionarnih ruskih častnikov z družinami, ki so bile prav tako na razpolago paragvajskim oboroženim silam (Rodrigues Peixoto, 2018, str. 41). Počasi se je v Paragvaju začela oblikovati skupina izkušenih bivših carskih vojaških strokovnjakov (Nečajev, 2010, str. 56). V uradnih evidencah je navedenih približno 60–70 ruskih oficirjev, ki so neposredno sodelovali v vojni za Chaco (Nakayama, 2017, str. 14).

Zakaj so se ruski oficirji odzvali Beljajevemu pozivu za pomoč Paragvaju? Bivši carjevi privrženci naj bi razumeli konflikt kot neupravičen napad Bolivije na ozemlje Paragvaja in so želeli uporabiti svoje znanje vodenja vojaških operacij, ki so ga pridobili v Evropi. Hkrati si je bilo paragvajsko vodstvo blizu z Veliko Britanijo, nekdanjo zaveznico Ruskega carstva med prvo svetovno vojno (Nečajev, 2010, str. 83). Po

ruski državljanski vojni so mnogi beli oficirji svojo kariero nadaljevali kot plačanci v različnih tujih vojaških silah (Carkov, 2018, str. 152). Za mnogo emigrantov je bila selitev priložnost za beg pred revščino, vojnami in politično nestabilnostjo. Paragvaj je ponujal obljubo boljšega življenja ter večjih možnosti za zaposlitev in lastništvo zemlje, kar je mnogim omogočilo, da so izboljšali svoje gospodarsko in socialno stanje (Sanchez-Alonso, 2007, str. 398).

Zakaj se ni odzvalo več oficirjev? V Paragvaj so prihajali redki emigranti in pustolovci. Odmevale so izkušnje zavedenih in izkoriščenih priseljencev iz Braziliije, ki so postali prisilni delavci na plantažah sladkorja. Marsikoga niso prepričala zagotovila Beljajeva, pisma N. F. Erna ali jamstvo jugoslovanske vlade. Obenem zadnji vodje razbite bele armade zaradi pričakovanja propada Sovjetske zveze niso imeli želje po pošiljanju svojih moč čez Atlantik (Carkov, 2018, str. 152). Poleg tega so se v sami priseljenski ruski skupnosti v Paragvaju kmalu začela pojavljati trenja, še posebej med Bobrovskim in Beljajevim. Kljub trdom Beljajeva, da bi ustanovil »Ruski dom«, so mu načrte prekrizali drugi ambiciozni ruski priseljenci. Največji trn v peti mu je Nikolaj F. Ern, ki je v Paragvaj prišel na njegovo povabilo in ustanovil konkurenčni »Ruski klub« (Beljajev, 2015, str. 293).

VOJNA ZA CHACO

Med nam zelo dobro poznanima svetovnima vojnama 20. stoletja je izbruhnila – danes precej neznana – prva moderna in zelo krvava vojna v Latinski Ameriki. Šlo se je za določitev meje med Paragvajem in Bolivijo, ki še ni bila definirana, saj je, kot se je izrazil ruski zgodovinar Boris Martynov, »težko deliti nekaj, o čemer nimaš pojma« (Martynov, 2006, str. 106, 107). Kljub diplomatskim naporom in dolgih pogajanjih od leta 1852 naprej se državi do 30. let 20. stoletja nista mogli poenotiti glede mejne črte (Chesterton & Isaenko, 2014, str. 624). Bolivija je v pacifiški vojni s Čilom dokončno izgubila dostop do morja in začela iskati nove rečne izhode v smeri Paragvaja in reke Paragvaj, po kateri bi teoretično lahko priplula do Atlantika (Rodrigues Peixoto, 2018, str. 44). Hkrati so vodo na mlin prilila poročila o večjih nahajališčih nafte v bolivijski regiji Camiri in raziskovanje nafte po letu 1922 ameriške družbe Standard Oil na vzhodu Bolivije. Po letu 1906 so hitro rasle bolivijske utrdbe ob bregovih reke Pícolomayo, prišlo pa je celo do nekaj prvih manjših spopadov s paragvajskimi garnizijami pri utrdbah ob reki Paragvaj (Martynov, 2006, str. 106, 107). Napetost med državama je začela kritično naraščati (Trejo, 2019, str. 39).

Sporno območje je predstavljala pokrajina Chaco, ki danes predstavlja več kot polovico Republike Paragvaj (Martynov, 2006, str. 106, 107). V 20. letih 20. stoletja je bil Chaco še vedno neraziskano, nenaseljeno področje, ki ga tudi danes naseljuje le 2 % paragvajskega prebivalstva (Nickson, 1993, str. 436). Obširna regija, ki se razteza tudi na ozemlja Argentine in Bolivije, je dom jaguarjev, krokodilov, tapirjev, pum, divjih prašičev, strupenih kač, velikanskih mravelj, nevarnih komarjev ter

posameznih plemen staroselcev (Martynov, 2006, str. 105). Že v prejšnjem stoletju so dolгим deževnim mesecem sledila daljša sušna obdobja, in ena težjih stvari je bila najti pitno vodo. Nekatera plemena so bila strah in trepet že za španske in portugalske kolonizatorje ter prebivalce obmejnih predelov. V poročilih zgodnjega 20. stoletja je bil Chaco pogosto poimenovan »zeleni pekel« (Chesterton & Isaenko, 2014, str. 616, 622, 624). Velikost same pokrajine je v vsakem viru navedena drugače, a iz mirovne pogodbe leta 1938 je razvidno, da je sporno območje približno zajemalo skupno površino današnje Slovenije, Avstrije, Madžarske in Hrvaške (Carkov, 2018, str. 5).

General Beljajev je bil takoj po začetku sovražnosti leta 1932 poslan na prvo uradno mesto spopada. Kasneje so mu na fronto sledili še drugi bivši ruski oficirji. Beljajev je bil zadolžen za obrambo pri jezeru Pitiantuta in je komaj preživel malarijo, ki ji je podlegel celotni odred. Na začetku bojevanja je bil del vrhovnega štaba paragvajskega generala na fronti. Kasneje se je kot poveljnik osebja generala Rojasa, poveljnika paragvajskih kopenskih in pomorskih sil, vrnil v Asunción, kjer je bil zadolžen za pisanje poročil predsedniku države Ayali (Beljajev, 2015, str. 294–297).

Razlogov za zmago Paragvaja v vojni za Chaco je več, najpomembnejši pa so boljše poznavanje terena, izkušeni staroselski vodniki, pomoč staroselskih plemen, gverilsko bojevanje, pomoč Argentine, boljša logistika ter učinkovitejša transportna mreža (Baptista Gumucio, 1996, str. 743). Ker je bila »sama razdalja od La Paza do reke Paragvaj enaka razdalji od Berlina do Moskve«, so imeli Bolivijci bistveno več logističnih problemov, ki jih niso uspešno reševali (Carkov, 2018, str. 7). Tropske bolezni, paraziti, dehidracija, nehigienske razmere, podhranjenost in predvsem žeja so bili razlogi za številne tragične zgodbe vojakov, še preden so ti sploh dosegli fronto (Cote, 2018, str. 745). Po uspešnih raziskovalnih ekspedicijah so bili zemljevidi Beljajeva, dialog s staroselskimi plemeni ter načrtovane in inženirsko izpopolnjene nove utrdbe ključnega strateškega pomena za paragvajsko zmago (Rodrigues Peixoto, 2018, str. 54).

PO ZELENEM PEKLU

Po vojni so vsi ruski borci, ki so se borili v vojni za Chaco, prejeli paragvajsko državljanstvo, nekateri celo častni »križ branilca Chaca« ali »križ zaščitnika (paragvajske domovine« (Martynov, 2006, str. 168). Ruski častniki so paragvajski vojski posredovali svoje vojaške izkušnje ter znanje utrjevanja in inženirstva, ustanovili pa so tudi konjeniški korpus (Carkov, 2018, str. 158). Beljajevu je ideja Ruskega doma uspelo udejanjiti le delno, saj je na njegovo pobudo v Paragvaj sicer pripotovalo veliko ruskih priseljencev, pri čemer pa so nekateri ostali, drugi pa so se selili dalje. Uspelo pa mu je oblikovati manjšo priseljenško rusko skupnost kot nekakšno zatočišče za tiste, ki so izgubili svojo domovino. Ohranili so se ruska tradicija, njegovo društvo Zaščita ruskega kmeta v Paragvaju s petimi ruskimi kolonijami ter zadruga Rodina.

Ideja Beljajeva je v priseljskih skupnosti v Latinski Ameriki postala predmet obrekovanja (Muhačov, 2016, str. 189), določeni posamezniki pa so načrtno delovali proti verodostojnosti njegovih prizadevanj (Nečajev, 2010, str. 58). Beljajev je v svojem dnevniku sam sebe ironično poimenoval »paragvajska sfiga«, saj se je po številnih napadih drugih ruskih priseljencev zavezal molku v javnosti (Beljajev, 2015, str. 301). Leta 1936 je bil z državnim udarom odstavljen predsednik Ayala, ki je bil naklonjen ruskim častnikom. S tem so dokončno propadle možnosti za realizacijo Beljajevove ideje o ustanovitvi ruske zaledne kolonije (Nečajev, 2010, str. 57).

Beljajev nikoli ni imel otrok, zaradi česar so paragvajski staroselci postali njegovi »veliki otroci«. Za njih je postal t. i. beli vodja oz. beli oče (Beljajev, 2015, str. 2, 37). Svoja antropološka dela je razvijal predvsem s staroselci iz plemena Maka (Rodrigues Peixoto, 2018, str. 58). S primerjalno analizo je raziskoval 14 staroselskih jezikov in narečij staroselcev Chaco. Njegov najpomembnejši sklep je bil skupen izvor staroselskih jezikov iz sanskerta, ki potrjuje teorijo o azijskih koreninah avtohtonega prebivalstva Amerike (Martynov, 2006, str. 215).

Maja 1936 je bil Beljajev prisiljen v častno upokojitev, po kateri je deloval kot svetovalec ministrstva za obrambo, saj ga je bivši ruski general Nikolaj Ern zaradi njunega ideološkega spora v ruski migrantski skupnosti s podporniki obtožil prokomunističnih simpatij in ga tako očrnil pred novo politično oblastjo (Carkov, 2018, str. 158). Ern, ki je v Paragvaj sicer migriral na Beljajevo povabilo, je med vojno za Chaco deloval v paragvajski obveščevalni službi in postal pomembna figura v ruski migrantski skupnosti. Bil je predstavnik pravoslavne cerkve in vodja t. i. Ruskega kluba (šp. *Union Ruso*), ki je predstavljal konkurenco Beljajevovemu Ruskemu domu in je bil središče ruskega kulturnega življenja v Asunciónu. Daljša odsotnost Beljajeva na raziskovalnih odpravah v regiji Chaco ni pomagala širjenju njegovega Ruskega doma, še posebej po škandalu, ko naj bi sorojak in spremljevalec Beljajeva Lev Oranžev trdil, da ga je general na eni izmed zadnjih odprav zaradi bolezni pustil umreti v džungli pri domorodnem plemenu (Carkov, 2018, str. 154).

Beljajev se je po neuspešni misiji vzpostavitve Ruskega doma do konca življenja bolj posvetil zaščiti pravic staroselcev (Nečajev, 2010, str. 58). Po vojni je bil v Paragvaju ustanovljen Etnološki muzej, leta 1936 pa pod nadzorom vojnega ministrstva še Patronato de los Indígenas del Chaco, odbor za zaščito in pomoč domorodnim skupnostim v regiji Chaco pod skrbništvom vladnih oboroženih sil (Capdevila, 2022, str. 156). Beljajev je leta 1937 zasedel mesto direktorja Nacionalnega urada za staroselske zadeve. V deklaraciji o pravicah Indijancev je zapisal, da sta za staroselske skupnosti ključna popolna avtonomija in odprava nepismenosti – le tako bi jih posledično lahko prevzgojili z osnovami in vrednotami civiliziranega življenja (Martynov, 2006, str. 215). Do smrti je poudarjal vrednost plemen kot cenjenih državljanov Paragvaja in njihovo vključitev v družbo (Chesterton & Isaenko, 2014, str. 639).

Leta 1938 je bilo v Asunciónu uprizorjeno Beljajevo gledališko delo z naslovom Indijanska fantazija (Capdevila, 2022, str. 157). Kot ustanovni član organizacije

Patronato de los Indígenas del Chaco je bil direktor nacionalnega pokroviteljstva in generalnega upravitelja staroselskih kolonij v Paragvaju, kasneje, po letu 1942, pa je deloval tudi kot predsednik civilnega Združenja staroselskih ljudstev Paragvaj (šp. *Asociación Indigenista del Paraguay*), ki se je osredotočalo na antropološke raziskave, zaščito kulture, zagotavljanje zdravstvene oskrbe ter pravni boj za vrnitev ozemelj domorodnim skupnostim (Nečajev, 2010, str. 61). Proti koncu življenja je pisal znanstvene članke tudi v angleščini. Njegovi prispevki so bili večkrat objavljeni tudi v ugledni znanstveni reviji *La Revista de la Sociedad Científica del Paraguay* (Chesterton & Isaenko, 2014, str. 618, 645). V petem zborniku Znanstvenega društva Paragvaja (izv. *Sociedad Científica del Paraguay*), objavljenem leta 1934, je izšlo Beljajevo delo z naslovom *Fortificaciones de Campana*, kot prispevek vojaške šole o pomembnosti grajenja utrdb (Belaieff, 1934, str. 1–25). Beljajev je bil leta 1942 zaslužen za ustanovitev kolonije Fray Bartolomé de las Casas na otoku reke Paragvaj, ki je služila kot zatočišče avtohtonih prebivalcev iz pokrajine Chaco (Nickson, 1993, str. 67). Pomagal je vsakemu, ki je potreboval pomoč – tudi tistim, ki so zapustili kolonijo, je pomagal najti službe in nastanitev v mestu. V pismu bratu Nikolaju v Pariz leta 1953 je zapisal: »Mi sami, kot v stari pravljici, ob koncu svojih dni živimo tiho, mirno in srečno, samo Gospod ve, kako naprej. Vendar verjamemo v najboljše. Res je, življenje postaja vse dražje ... in generalska pokojnina, čeprav povišana, vzbuja samo obžalovanje« (Martynov, 2006, str. 190, 210).

Beljajev je umrl 22. junija 1957 s skromnim premoženjem, ne glede na številne zaslužene nazive in zlonamerne govorice, da je goljufal lahkoverne priseljence (Martynov, 2006, str. 209). Pokopan je bil v domorodni koloniji Fray Bartolomé de las Casas, ki jo je ustanovil, kot paragvajski narodni heroj Comandante Juan Belaieff z vsemi vojaškimi častmi paragvajskega generala in častnega državljana. Staroselci so dva dni držali častno stražo, dokler ga niso z vojaško ladjo odpeljali in pokopali na otoku sredi reke Paragvaj, na ozemlju plemena Macca (Nečajev, 2010, str. 61). V Chacu še danes stoji spomenik v spomin nanj, »ruskemu junaku boja za svobodo bronastopolnih otrok puščave« (Beljajev, 2015, str. 2).

Odprave Beljajeva in raziskovanje staroselskih študij je v Paragvaju nadaljevala znana slovenska antropologinja Branislava Sušnik, ki je sodeč po slovenskih in španskih virih sicer iz Argentine v Paragvaj prišla na povabilo vodje Rdečega križa dr. Andresa Barbere (Terčelj, 2021, str. 32). Sledeč raziskovalcu Borisu Martinovu naj bi jo po emigraciji leta 1947 v Paragvaj privabili Beljajevovi članki o staroselski kulturi in jeziku. Leta 1951 naj bi Beljajev dosegel, da so zanj ustanovili oddelek za primerjalni študij staroselskih jezikov na Univerzi v Asunciónu, ter ji predal vsa svoja znanstvena dela, ki jih tudi pogosto navaja v svojih delih (Martynov, 2006, str. 210). V svoji knjigi z naslovom *Paragvajski aborigini III* (šp. *Los aborígenes del Paraguay III*) iz leta 1981 na primer citira štiri njegova dela: *Los indios Sociegay* (1930), *Vocabulario Macca* (1931), *El vocabulario Chamacoco* (1937) in *Los Indios del Chaco Paraguayo y su tierra* (1941) (Susnik, 1981, str. 222). Dejstvo, da je Beljajev ob prihodu v Paragvaj pomagal Branislavi Sušnik, je na kratko omenjeno tudi v članku Federica Bosserta in

Diega Villarja z naslovom »Branislava Sušnik in antropologija sprememb«, v katerem avtorja trdita, da ji »je pomagal ruski geograf, antropolog, lingvist in vojak Juan Belaieff (1875–1957), ki je bival v Paragvaju in ji omogočil obisk ljudstva Maka v koloniji Fray Bartolomé de las Casas (v Chacu)« (Bossert & Villar, 2025, str. 176). Branka Sušnik je nato dolga desetletja delovala kot direktorica Etnografskega muzeja Andrés Barbero v Asunciónu (Martynov, 2006, str. 210).

Zgodba o generalu Beljajevu je v ZSSR postala znana, ko se je njegova sestrčina Elizaveta Mihailovna Spiridonova iz Buenos Airesa po njegovi smrti v 60. letih 20. stoletja vrnila v Sovjetsko zvezo in s seboj prinesla generalovo osebno korespondenco, arhiv in dnevnike. Ti so danes shranjeni v rokopisnem skladu GBIL oz. v Leninovi knjižnici v Moskvi (Martynov, 2006, str. 209). V času Sovjetske zveze je bila omemba Beljajeva kot sovražnika sovjetskega ljudstva strogo cenzurirana (Chesterton & Isaenko, 2014, str. 617). Njegov arhiv je v 70. letih 20. stoletja prva preučevala etnografinja V. A. Višnevetskaja (Beljajev, 2015, str. 3). Šele po razpadu ZSSR se je njegovo ime počasi pričelo pojavljati v ruski zgodovinski literaturi s prvimi članki in knjigo *Russkij Paragvaj: Povest o generale Beljajevu, ljudjah i sobytijah prošlogo veka* (»Ruski Paragvaj: Zgodba o generalu Beljajevu, ljudstvu in dogodkih preteklega stoletja«) Borisa Martynova v ruščini (Chesterton & Isaenko, 2014, str. 617). Francoski zgodovinar Nicolas Richard je v svojem članku »La tragedia del mediador salvaje. En torno a tres biografías indígenas de la guerra del Chaco« (»Tragedija domorodnega posrednika: Tri staroselske biografije iz vojne za Chaco«) iz leta 2011 navedel, da naj bi sovjetske tajne službe po smrti Beljajeva pridobile njegove spomine, ki so vsebovali tudi pomembne podatke o protirevolucionarni ruski vojski (Richard, 2008, str. 52).

V špansko govorečem zgodovinopisju je še danes malo biografskih podatkov o Beljajevu, saj nihče ni nikoli prevedel njegovih dnevnikov. Španski raziskovalci so si lahko pomagali le s knjigo *Pitiantuta: la chispa que encendió la hoguera en el Chaco paraguay* (»Pitiantuta: iskra, ki je zanetila ogenj v paragvajskem Chacu«) o odkritju jezera Pitiantuta ruskega priseljenca Alejandra von Ecksteina, ki je spremljal Beljajeva na številnih odpravah, in s spomini paragvajskega polkovnika J. C. Fernandéza, ki je leta 1955 izdal tridelno zbirko *La guerra del Chaco* (»Vojna za Chaco«; I. Boquerón, II. Saavedra, III. Zenteno-Gondra) in je na fronti deloval ob boku z Beljajevim (Chesterton & Isaenko, 2014, str. 617). Poleg tega Nicholas Richard v svojem članku »Los baqueanos de Belaieff« (»Beljajevi vodniki«) navaja tri javno dostopna poročila Beljajeva o njegovih odpravah, ki so bila namenjena paragvajskemu ministrstvu za obrambo (Richard, 2008, str. 293).

Prvi spomini generala Beljajeva so bili objavljeni leta 1994 v kazahstanski reviji *Prostor*, šele leta 2010 pa so bili pod urednikom P. Golubevom v St. Peterburgu v knjigi *Zapiski ruskogo izgnanika* (»Zapisi ruskega izgnanca«) v Rusiji izdani delci Beljajevovega originalnega dnevnika: zapiski o življenju v Ruskem carstvu, prvih izkušnjah v vojski, odpravah na Kavkaz, sodelovanju s Carskim geografskim društvom za raziskovanje Kavkaza ter službovanju v Tbilisiju, o frontah prve svetovne vojne, v času pred izbruhom ruske državljanske vojne, o priseljenstvu v Argentino in o paragvajski

zgodbi. Komentarje na besedilo je dodala daljna sorodnica Beljajeva I. V. Kuznecova (Belaieff, 1941, str. 3, 4). Leta 2015 je izšla najnovejša knjiga Nikolaja Starikova *Gde vera i ljubov ne prodajutsja. Memuari generala Beljajeva* (»Kjer vera in ljubezen nista naprodaj: Spomini generala Beljajeva«; Starikov, 2015).

ZAPUŠČINA RUSKIH PRISELJENCEV

Prisotnost ruskih priseljencev je na Paragvaj vplivala tudi na druge načine? V tej državi sta po vojni za Chaco zrasli dve pravoslavni cerkvi (Nečajev, 2010, str. 35, 69) – v tisti v Asunciónu še danes visi marmornata plošča s starimi ruskimi napisi (Martynov, 2006, str. 123). Po vojni so številni Rusi prejeli najvišja vojaška priznanja, spominske plošče v Panteonu junakov v Asunciónu in paragvajsko državljanstvo (Muhačov, 2016, str. 190). V vojski in v paragvajski družbi nasploh so bili zelo cenjeni (Nečajev, 2010, str. 55). Sodelovali so tudi pri ustanovitvi Inženirske fakultete Univerze v Asunciónu, pri letalski šoli, pri radijski postaji, pri razvoju cestne infrastrukture in električne oskrbe itd. (Muhačov, 2016, str. 190). Poleg tega je bila na Ministrstvu za javno upravo dolgo časa delovni jezik ruščina (Nečajev, 2010, str. 56). Začeli so delovati ruska gledališka skupina, šola, knjižnica, društvo vzajemne pomoči Ruska zveza in prva akademija za klasični ples (Nakayama, 2017, str. 56). Še danes je približno 15 ulic poimenovanih po španskih imenih bivših »belih« ruskih borcev v vojni za Chaco (Martynov, 2006, str. 124). Na jugu Paragvaja še vedno obstaja različica pijače terere, ki se ji reče *tereré ruso* (ruski terere) in se dela iz soka citrusov namesto iz vode (Rodrigues Peixoto, 2018, str. 39).

Če leta 1936 ne bi prišlo do državnega udara, bi bil sprejet osnutek zakona o pravicah in privilegijih ruskih priseljencev, ki ga je Beljajev že dve leti prej predložil senatu in poslanski zbornici paragvajskega parlamenta. Z zakonom bi bila ruskim priselencem priznana svoboda veroizpovedi, vodenje svojih šol, skupno lastništvo zemlje ter ohranjanje kozaških običajev in tradicije (Nečajev, 2010, str. 57, 91). Zakon je med drugim tudi preprečeval diskriminacijo nad kolonisti ter omogočal sodelovanje kolonistov v političnih strankah in prodajo alkoholnih pijač pet metrov od meja kolonij (Martynov, 2006, str. 177).

Ruske priseljence v Paragvaju so leta 1949 zamenjali kitajski politični migranti, ki so bežali pred represijo. Leta 1954 je oblast v državi prevzel Alfredo Stroessner in z močno diktaturo vladal vse do leta 1989. Stroessner je med vojno za Chaco služil pod Beljajevim, zelo je spoštoval ruske častnike in je vodil izrazito protikomunistični režim. Nekateri ruski migranti so pod diktaturo Stroessnerja lahko ostali na visokih vojaških in pravnih položajih v državi, Paragvaj pa je bil takrat edina država, ki ni priznala komunističnega režima v Rusiji po revoluciji leta 1917 (Nečajev, 2010, str. 59, 60, 71).

Najbolj zanimivo je, da priseljevanje bivših ruskih carskih oficirjev v Paragvaj v 20. in 30. letih 20. stoletja ter o njihovi pomoči v vojni za Chaco danes slabo

poznano zgodovinsko dejstvo. Zakaj je tako? Zamolčano sodelovanje ruskih posameznikov v vojni za Chaco v paragvajskem zgodovinopisju je lahko razumljeno v kontekstu nepravilnih paragvajskih interpretacij lastne preteklosti, državnosti in odnosa do ostalih držav. Paragvajsko zgodovinopisje je bilo in je še vedno zelo provincialno in zaprto zaradi »geografskega determinizma ter izolirane kolonialne in nacionalne preteklosti, ki so jo zaznamovali despotski vladarji« (Chesterton & Isaenko, 2014, str. 618).

Tudi vojna za Chaco je danes slabo poznano zgodovinsko dejstvo. Matthew Hughes v svojem članku »Logistics and Chaco War« navaja, da je bilo v popisu v Asunciónu v 80. letih 20. stoletja navedenih 450 knjig in člankov o vojni, od tega le 14 v angleškem jeziku (večinoma vladne publikacije, disertacije ali diplomatska zgodovina). Bolivijski popis bibliografije iz leta 1996 navaja le 187 knjig o vojni, od tega le eno v angleščini. Po Hughesu je bila najpomembnejša prelomnica, kar zadeva dostopnost informacij o vojni za Chaco, izdaja knjige *The Conduct of the Chaco War* Davida Zooka leta 1960 (Hughes, 2005, str. 412, 413). Regija Chaco še danes ostaja nerazvita in izolirana. Dostop do zgodovinsko pomembnih krajev iz obdobja vojne je brez utrjenih cest zelo otežen in nevaren. Problem ni samo v pomanjkanju infrastrukture, temveč raziskovanje otežujejo tudi zasebni posestniki, gosti grmičevje, nerazvitost arheološke vede v državi, pomanjkanje podpore vladnih institucij, težaven dostop do arhivskih virov in pomanjkanje referenčnega sistema, številne nevarne divje živali ter tihotapska pot iz Bolivije (Breithoff, 2020, str. 7–9). Hkrati je bil vse do danes zelo močan mit o krivcu za začetek vojne, ameriškem naftnem podjetju Standard Oil. To je razglašala poražena bolivijska vlada, da je pozornost odvrnila od lastne krivde, in je postal splošno uveljavljen pogled v latinoameriški javni zavesti, kar je oteževalo objektivne zgodovinske raziskave (Cote, 2018, str. 739).

V paragvajskih pisnih zgodovinskih študijah so ruski priseljenci zelo redko omenjeni, kar je posledica dejstva, da so Bolivijci v vojni za Chaco s ponosom najemali nemške najemnike, medtem ko so Paragvajci bolj simbolizirali »paragvajskost« njihove vojske. Celo vrhovni poveljnik paragvajske vojske Jose Felix Estigarribia v svojih spominih sploh ne omenja ruskih oficirjev, tam, kjer so vendarle bežno omenjeni, pa so vsa imena prevedena v španščino – npr. Juan Belaieff namesto Ivan Beljajev (Chesterton & Isaenko, 2014, str. 618, 619). Kot že omenjeno, Beljajeva – in nekatere druge ruske oficirje – kot eden redkih omenja paragvajski poveljnik C. J. Fernández v svoji zgodovinski trilogiji *La guerra del Chaco* iz leta 1956.

Vsi načrti za ustanovitev ruske enklave, ki bi ohranjala tradicionalne vrednote carske Rusije sredi pokrajine Chaco, so bili zatrti z razvojem političnih dogodkov po vojni. Kar je bilo obljubljeno Beljajevu, je z državnimi udari, nestabilnostjo in menjavo političnih akterjev padlo v vodo. Verjetno bi se dogodki drugače odvijali, če bi Rusi leta 1936 dobili posebne pravne ugodnosti s predlaganim Zakonom o pravicah in privilegijih ruskih priseljencev. Dokončno pa so vsi upi padli v vodo, ko se je na oblast povzpel Stroessner s svojo diktaturo (Chesterton & Isaenko, 2014, str. 618, 619).

ZAKLJUČEK

Kdo vse je bil torej Ivan Timofejevič Beljajev – general bele garde, ki se je v 20. letih 20. stoletja znašel v daljnem Paragvaju? Na to vprašanje je zelo podrobno odgovoril ruski zgodovinar Boris Martinov v svoji knjigi *Ruski Paragvaj*. Beljajev je bil namreč general ruske vojske, general paragvajske vojske, staroselski voditelj in predvsem t. i. »poklicni reševalec«. Vse življenje si je aktivno prizadeval za družbeno koristne cilje. Najprej je vse moči uperil v boj proti boljševikom, in ko se je postalo jasno, da jih ne bo mogoče hitro poraziti, se je celotno obdobje v emigraciji zavzemal za ohranitev vere, tradicij in kulture ruskega naroda. Hkrati je svoje napore usmeril v pomoč Paragvajcem v boju proti Boliviji ter do konca življenja goreče zagovarjal in se boril za pravice paragvajskih staroselcev (Martynov, 2006, str. 210).

Življenjska pot Beljajeva je bila podobna pustolovskemu romanu, saj mu je deset let pred izbruhom ene najbolj krvavih vojn v Latinski Ameriki uspelo v trinajstih vojaško-etnografskih raziskovalnih odpravah, kljub pretečim nevarnostim, raziskati do tedaj povsem neznano pokrajino Chaco, veliko kot današnja Poljska. Na njih je prvi kartografsko, hidrografsko, analitično in strateško popisal vse sporno območje. Beljajevu je na svoji trinajsti odpravi uspelo priti celo do legendarnega jezera Piti-antuta na skrajnem severu pokrajine. Hkrati je general že pred vojno stkal močne stike s staroselskimi plemeni in jih povezal s paragvajsko vojsko. S svojimi poročili in priporočili je ustvaril osnovo za paragvajski obrambni načrt.

Na njegovo povabilo je v Paragvaj takoj za njim prispelo dvanajst bivših carskih ruskih strokovnjakov, ki so jim sledili še številni drugi ruski priseljenci. Ti so bistveno pripomogli k okreelitvi paragvajske vojske. Vojna je izbruhnila leta 1932 in je trajala do leta 1935. Meja med Bolivijo in Paragvajem sicer ni bila definirana vse do podpisa arbitraže tri leta kasneje. Med vojno za Chaco je Beljajev služil kot član paragvajskega vrhovnega generalštaba, njegove predhodne odprave in sodelovanje s staroselskimi plemeni pa so bili ključni za paragvajsko zmago. Izkušeni staroselski vodniki so presenetili sovražnika z gverilskim bojevanjem. Hkrati je bil Beljajev zaslužen za predstavitev drugačnega pogleda o staroselskih ljudstvih paragvajski javnosti. S svojim antropološkim in lingvističnim raziskovanjem kulture staroselcev je prispeval k razumevanju drugačnih kultur ter utrl pot za raziskovanje slovenski antropologinji Branislavi Sušnik, ki je 45 let vodila Etnografski muzej v Paragvaju. Beljajev se je do konca življenja boril za pravice staroselcev in izboljšanje njihovega življenjskega standarda. Njegove sanje o organizaciji Ruskega doma se niso uresničile, vendar je v Paragvaju s prihodom množice ruskih priseljencev za kratek čas zaživela ruska priseljska kultura z bogato kulturno dejavnostjo, katere ostaline v paragvajski družbi najdemo še danes.

IZJAVA O DOSTOPNOSTI RAZISKOVALNIH PODATKOV

V članku niso bili uporabljeni ali analizirani raziskovalni podatki.

VIRI IN LITERATURA

- Baptista Gumucio, M. (1996). *Breve historia contemporánea de Bolivia*. Fondo de Cultura Economica.
- Belaieff, J. (1934). *Fortificaciones de Campaña* (Vol. 5). Sociedad Científica del Paraguay.
- Belaieff, J. (1941). Los indios del Chaco paraguayo y su tierra. *Revista de la Sociedad Científica del Paraguay*, 5(3), 1–48.
- Beljajev, I. T. (2015). *Gde vera i ljubov ne prodajutsja. Memuary generala Beljajeva*. Piter.
- Bossert, F., & Villar, D. (2025). Branislava Sušnik in antropologija. V J. Repič & M. U. Geršak (ur.), *Pogledi na Branislavo Sušnik in njen prispevek k raziskavam paragvajskih staroselskih ljudstev* (str. 175–201). Založba Univerze v Ljubljani. <https://doi.org/10.4312/9789612975272>
- Breithoff, E. (2020) *Conflict, heritage and world-making in the Chaco: War at the end of the worlds?* UCL Press. <https://doi.org/10.2307/j.ctv13xprzz>
- Capdevila, L. (2022). *Paraguay bajo la sombra de sus guerras: historia, memoria y construcción política, siglos XIX–XXI*. SB Editorial.
- Carkov, O. (2018). *ČAKO 1928–1938. Neizvestnaja lokalnaja vojna – Tom I*. Samizdat.
- Chesterton, B. M., & Isaenko, A. V. (2014). A White Russian in the Green Hell: Military Science, Ethnography, and Nation Building. *Hispanic American Historical Review*, 94(4), 615–648. <https://doi.org/10.1215/00182168-2802654>
- Cote, S. (2013). A war for oil in the Chaco, 1932–1935. *Environmental History*, 18(4), 738–758. <https://doi.org/10.1093/envhis/emt066>
- Fernández, C. J. (1956). *La guerra del Chaco. Volumen I – Boqueron*. Impresora Oeste.
- Hughes, M. (2005). Logistics and the Chaco War: Bolivia versus Paraguay, 1932–1935. *The Journal of Military History*, 69(2), 411–437. <https://doi.org/10.1353/jmh.2005.0104>
- Martynov, B. F. (2006). *Russkij Paragvaj: Povest o generale Beljajeva, ljudjah i sobytijah prošlogo veka*. Military Publishing House (Vojenizdat).
- Muhačov, Ju. V. (2016). Iz istorii stanovljenija ruskoj občiny. V *Ruskoje zarubežje: istorija i sovremennost* (št. 5, str. 174–194). INION RAN.
- Nakayama, E. (2017). *La inmigración rusa en el Paraguay (1917–2017)* (raziskovalno poročilo). Academia.edu. https://www.academia.edu/34899781/La_inmigración_rusa_en_el_Paraguay_1917_2017_
- Naumov, V. (ur.). (2014). *Velikije russkije ekspediciji: Hronika putešestvij 19 – pervoj poloviny 20 v. AST*.
- Nečajev, S. Ju. (2010). *Russkije v Latinskoj Amerike*. Veče.

- Nickson, R. A. (1993). *Historical dictionary of Paraguay*. The Scarecrow Press.
- Richard, N. (2008). Los baqueanos de Belaieff: La mediación indígena en la entrada militar al Alto Paraguay. V N. Richard (ur.), *Mala guerra: Los indígenas en la Guerra del Chaco* (str. 291–333). Servilibro; Museo del Barro. <https://shs.hal.science/halshs-00948035>
- Rodrigues Peixoto, G. (2018). Russos na Guerra do Chaco: Fragmentos Históricos. *Cuadernos de Marte*, 9(14), 37–71.
- Rout, L. B. (1970). *Politics of the Chaco Peace Conference, 1935 – 1938*. University of Texas press. <https://doi.org/10.7560/700499>.
- Sanchez-Alonso, B. (2007). The other Europeans: Immigration into Latin America and the international labour market (1870–1930). *Revista de Historia Economica – Journal of Iberian and Latin American Economic History*, 25(3), 395–426. <https://doi.org/10.1017/S0212610900000185>
- Susnik, B. (1981). *Los aborígenes del Paraguay; etnohistoria de los chaqueños*. Museo etnográfico “Andrés Barbero”.
- Starikov, N. (2015). *Ivan Beljajev. Gde vera i ljubov ne prodajutsja: Memuari generala Beljajeva*. Piter.
- Terčelj, M. M. (2021). Zamolčana znanstvenica: doprinos dr. Branislave Sušnik k raziskovanju staroselskih kultur Paragvaja. *Dve domovini / Two Homelands*, 53, 27–44. <https://doi.org/10.3986/dd.2021.1.03>
- Trejo, P. J. N. J. (2019). La Guerra del Chaco. Una guerra de maniobras en el ,infierno Verde’. *Revista Visión Conjunta*, 11(2), 11–13.
- Vicens Vives J. (ur.). (1972). *Historia de España y América social y económica Volume V: Los siglos XIX y XX América independiente*. Vicens Bosillo.

SUMMARY

RUSSIAN GENERAL IVAN T. BELAIEFF IN THE GREEN HELL

Maja Ramuš

In the 1930s, a conflict erupted between Bolivia and Paraguay due to the problematic border demarcation in the Chaco region. During this period, the Paraguayan government allowed the arrival of a former Russian general, Ivan T. Belaieff, who had initially taught at a military school in Asunción. Before the war, he had successfully conducted thirteen military-ethnographic research expeditions in the Chaco area. During these expeditions, he was the first to make a cartographic, hydrographic, analytical, and strategic inventory of the entire disputed territory. In addition, he successfully established contacts with all the indigenous tribes in the Chaco, helped build important defense infrastructure, and provided the Ministry of Defense with military analysis that later served as the basis for Paraguayan military strategies during the war.

At Belaieff's invitation, the first twelve former Tsarist military specialists arrived in Paraguay in 1924, followed by many other former White officers. From the very beginning of the war, White Russian officers were on the front lines. They contributed to the development of the country in the areas of defense and road infrastructure, military organization and knowledge, military industry, mapping, and intelligence services. During the Chaco War, Belaieff himself served as an advisor to Paraguay's Supreme General Staff.

Some of the brave Russian officers died in the Chaco War. Many of the surviving Russian officers continued to serve in the Paraguayan army, making brilliant military careers. After the war, many Russian White officers received military awards, monuments, or streets that were named in their honor in Asunción. Many of them worked for a long time in the Ministry of Public Administration. The rich cultural involvement of Russian migrants led to the translation of Russian cavalry marches into Spanish, the construction of two Orthodox churches, the creation of the Russian theater, the popularization of *tereré ruso*, the Russian variation of the Paraguayan drink *tereré*, the foundation of various Russian societies, and the establishment of the first schools of classical dance.

Belaieff fought for the rights of Indigenous peoples until the end of his life. Unfortunately, the 1936 coup d'état prevented the adoption of the bill on the rights of Russian migrants introduced by him, and everything "Russian" became increasingly equated with communism in an anti-communist country. According to some accounts, Belaieff's work helped draw Slovenian anthropologist Branislava Sušnik to Paraguay in the 1940s, where she continued research among Indigenous peoples and directed the ethnographic museum in Asunción for more than four decades.

The 1920s and 1930s in Paraguay were unique for the Russian migrant community, and their presence played a role in defeating Bolivia in the Chaco War. This

article connects the chapter on military conflicts in South America in the twentieth century and the chapter on the migration of White Russians after the Russian Civil War. The topic remains surprisingly underexplored, as language barriers persist in today's globalized world. Such barriers point to the need for greater interdisciplinary and intercultural collaboration in academia.

EMERGING DIVERSIFICATIONS OF LABOR MIGRATION TO SLOVENIA: FROM THE WESTERN BALKANS TO ASIA

Mojca Vah Jevšnik,^I Sanja Cukut Krilić^{II}

COBISS: 1.01

ABSTRACT

Emerging Diversifications of Labor Migration to Slovenia: From the Western Balkans to Asia

Labor migration has long shaped Slovenia's labor market, through historically established arrivals from the former Yugoslav region, often referred to as part of the Western Balkans. Persisting labor market shortages—driven by demographic decline, low unemployment, and sectoral imbalances—have recently intensified competition for workers across the EU. As inflows from EU states remain limited, Slovenia has diversified its recruitment, with rising migration from Asia. It has signed a Memorandum of Understanding with the Philippines on cooperation in labor relations and employment. The article examines policy developments and labor-market data on foreign workers from 2010 to 2024, evaluating the interplay between labor shortages, employer demand, and the governance of labor migration.

KEYWORDS: labor market shortages, labor migration, Slovenia, Western Balkans, Asia

IZVLEČEK

Nove oblike delovnih migracij v Slovenijo: od Zahodnega Balkana do Azije

Delovne migracije že dolgo zaznamujejo slovenski trg dela, predvsem z zgodovinskimi priseljevanji iz nekdanjih jugoslovanskih republik, ki so danes del t. i. Zahodnega Balkana. Vztrajno pomanjkanje delovne sile, ki izhaja iz demografskega upada, nizke brezposelnosti in sektorskih neravnovesij, je v zadnjem času zaostriло konkurenco za delavce po vsej Evropski uniji. Ker so priseljitveni tokovi iz držav članic EU omejeni, je Slovenija razširila svoje zaposlovalne kanale, kar se odraža v naraščajočih migracijah iz Azije ter v podpisu memoranduma o soglasju s Filipini o sodelovanju na področju delovnih razmerij in zaposlovanja. Avtorici na podlagi podatkov za obdobje 2010–2024 obravnavata trende (upravljanja) delovnih migracij in podatke o priseljevanju in trgu dela ter analizirata medsebojno odvisnost med strukturnimi primanjkljaji delovne sile, povpraševanjem delodajalcev in oblikovanjem migracijskih politik.

KLJUČNE BESEDE: primanjkljaji na trgu dela, delovne migracije, Slovenija, Zahodni Balkan, Azija

^I PhD in social work; Research Centre of the Slovenian Academy of Sciences and Arts, Slovenian Migration Institute, Ljubljana, and University of Nova Gorica, Nova Gorica; mojca.vah@zrc-sazu.si; ORCID <https://orcid.org/0000-0001-8388-7804>

^{II} PhD in sociology; Research Centre of the Slovenian Academy of Sciences and Arts, Sociomedical Institute; Ljubljana; sanja.cukut@zrc-sazu.si; ORCID <https://orcid.org/0000-0002-4498-3809>

INTRODUCTION

Labor migration to Slovenia has been a persistent phenomenon since the end of World War II, when Slovenia emerged as an important destination for workers from other Yugoslav republics—namely Croatia, Bosnia and Herzegovina, Serbia, Montenegro, and Macedonia through internal migration within the Yugoslav federation. Immigration from these republics gradually increased over the years, from initial dispersed settlement to chain migration that led to the formation of strong, extensive migration networks (Josipovič, 2006). After Slovenian independence and the collapse of Yugoslavia in 1991, labor immigration from this geographical area, which has since been labeled as the Western Balkans, gained an international character, continued to persist, and has been on the increase ever since. Slovenia has continued to rely on workers from the Western Balkans to fill labor-market vacancies across a variety of sectors. Moreover, due to the economic booms from 2004 to 2008 and after 2017, Slovenian employers began actively recruiting workers from these countries (Bučar Ručman, 2025), and Slovenian immigration policy followed suit by signing bilateral agreements with Bosnia and Herzegovina and Serbia to facilitate immigration. Labor demand also remained high due to Slovenian involvement in the posting of workers to other Member States, where Slovenian businesses created extensive business opportunities within the framework of the provision of services—especially in the construction sector (Vah Jevšnik et al., 2022).

In recent years, however, labor shortages in Slovenia have reached unprecedented levels. In 2024, the unemployment rate fell to just 3–4 percent, while approximately 46.5 percent of employers reported experiencing a shortage of suitably qualified candidates (Banka Slovenije, 2025). The unfavorable demographic conditions, high retirement rates, and unpopularity of certain professions have all contributed to the shortages and increased the need to recruit workers from abroad. However, as many EU Member States face comparable labor market shortages, they too have begun actively recruiting workers from the Western Balkan countries, offering various incentives, higher wages, and better working conditions, thereby engaging in open competition for labor. Since immigration to Slovenia from other EU countries remains low, employers have begun turning toward other possible third countries to recruit workers. Since 2022, labor migration from India, Nepal, China, Bangladesh, and the Philippines has increased significantly.

The unprecedented geographical diversification in the recruitment of third-country nationals has also received governmental support. In 2025, Slovenia reinforced this shift through new bilateral cooperation with the Philippines, including a Memorandum of Understanding on labor mobility and the opening of the Slovenian Embassy in Manila (Gov.si, 2025).

The article examines these shifts in recruitment trends by analyzing statistical data and relevant national policy developments, focusing on the period from 2010 to 2024. The statistical data employed include information on shortage and deficit

occupations in the Slovenian labor market, the number and share of employed third-country nationals by nationality, their sectoral distribution, and the posting of third-country nationals from Slovenia to other EU Member States within the framework of the provision of services. The review of policy documents covers the two bilateral agreements that Slovenia has concluded with Bosnia and Herzegovina and with Serbia, as well as the Memorandum of Understanding currently in place with the Philippines. The findings are analyzed primarily using the theoretical and conceptual framework developed by Anderson & Ruhs (2010) to evaluate employer demand for migrant labor and examine the relationship between labor shortages, immigration, and public policy.

LABOR SHORTAGES AND THE IMMIGRATION OF FOREIGN WORKERS

Employer demand for migrant workers has become a defining feature of labor markets in high-income countries, where employers increasingly call for additional migrant labor, arguing that domestic labor supplies are insufficient to meet their needs. The notion of shortage that generally informs employers' requests for migrant workers is that labor demand surpasses the available supply at the existing wage levels and employment conditions (Anderson & Ruhs, 2010). However, short-term imbalances between labor supply and demand—arising from sudden increases in demand for specific occupations driven by economic dynamics, persistently low wages and poor working conditions in certain sectors, or declining interest in accepting particular jobs—can become even more acute and complex under growing demographic pressures. Consequently, incorporating demographic trajectories into any analysis of labor shortages is essential.

Defining *specific* reasons for labor shortages is fundamental to the analysis of shortages, immigration and public policy, which needs to address four key issues: the characteristics, dimensions, and determinants of employer demand for labor; characteristics of and segmentations in labor supply; employers' recruitment practices and use of migrant labor; and immigration and alternative responses to perceived staff shortages (Anderson & Ruhs, 2010). Such analysis must, by definition, be sector-specific, as each sector operates according to its own internal dynamics and particularities. The scope of this article is more modest and does not undertake a more detailed sectoral analysis. Nevertheless, the framework remains highly valuable for identifying broader labor-market patterns in Slovenia, which constitute the core of our inquiry. Another theoretical approach useful for analyzing the dynamics of labor migration of TCNs to Slovenia is the dual labor market theory (Piore, 1979). According to this theory, migration is primarily driven by structural labor demand in advanced industrial economies. Piore argues that labor markets in developed countries are divided into two segments: a primary sector characterized by stable employment, higher wages, and opportunities for advancement, and a secondary

sector marked by low wages, insecurity, and poor working conditions. Native workers tend to avoid employment in the secondary sector, creating a persistent demand for migrant labor to fill these positions. In this perspective, international migration is therefore understood as a structural feature of modern economies rather than solely an individual economic choice. However, a complementary theoretical approach is also required to understand that migration decisions are often made collectively by households or families as a strategy to manage economic risks, diversify income sources, and overcome market failures in countries of origin (Stark & Bloom, 1985). From this perspective, international migration is understood not only as a response to labor demand in destination countries, but also as a household-level strategy shaped by broader socio-economic conditions. Together, these theoretical approaches contribute to a more comprehensive understanding of the dynamics of labor immigration to Slovenia, particularly amid persistent labor shortages and the growing demand for foreign workers in specific sectors.

Shortages on the Slovenian labor market are among the most acute in the European Union, as more than 40 percent of firms continue to report labor shortages as a factor limiting production (OECD, 2024), and shortages are reported in 105 occupations from a total of 436 in the ISCO nomenclature (EURES, 2024). Shortages are particularly pronounced in construction, manufacturing, health and social care, hospitality and related services, and education. Although they vary by sector, skill requirements, and geographic region, they are, in aggregate, substantial and structural rather than merely cyclical. This can, to a significant extent, be attributed to population aging and low birth rates. Political messages about the vanishing of values, way of life, and even the culture of less reproductive “domestic” populations due to “reproductively more vital foreigners or foreign-born populations” entrap labor migrants as well (Knežević Hočevar & Cukut Krilić, 2019).¹ In media and policy discourses, migrant workers are constructed not only as “culturally” and linguistically different but also as competitors in the labor market, a perception that can fuel resentment among local populations (Szelewa & Polakowski, 2022).

According to Knežević Hočevar (2011), there exist two sets of measures to improve the balance between the economically active and inactive populations. The first set of measures concerns increasing the fertility of “local populations,” and the second set pertains to immigration, which is not the preferred solution of nation-states. However, according to the latest Eurostat demographic projections from 2023, the population of Slovenia is expected to increase only until 2026, followed

1 For Slovenia, Knežević Hočevar (2011) examined how migration was represented in debates on declining fertility and demographic change in the Slovenian press from 1970 to 2009. The author argues that primordialist and essentialist understandings of collective membership in the national community prevailed in the media. A more detailed analysis from 2004 to 2009 showed that discussion of the replacement of the nation prevailed over emphasis on the replacement of Slovenia’s population. More inclusive concepts of the nation were in the minority. There has been no further research on the connection between migration and demographic trends in Slovenia.

by a decrease over the next 20 years, under the baseline demographic scenario. Changes in several key assumptions of this scenario show that an increase in net migration and lower mortality have the strongest effect on increasing the number of inhabitants compared with the baseline scenario. In 2100, Slovenia would have 331,000 more residents under the higher-migration scenario than under the baseline scenario, and 32,000 more under the lower-mortality scenario. Under a lower-fertility or lower-migration scenario, Slovenia would have about 300,000 fewer inhabitants by 2100, while under a scenario with no net migration, the country would have more than half a million fewer people than in the main projection (Institute of Macroeconomic Analysis and Development, 2025). These predictions point to the increasing importance of international migration in relieving labor market shortages.

Shortages of workers in Slovenia have historically been addressed by recruiting workers from abroad, especially from the countries of former Yugoslavia, due to their perceived historical, cultural, and linguistic proximity. As Anderson (2010) notes, presenting immigration as a positive solution for migrants, employers, and the national economy is harder to sustain during economic downturns than during periods of economic growth. This can also be observed in Slovenia's migration and labor market policies. Previously, one of the key state mechanisms for regulating labor migration to Slovenia, particularly in response to the economic crisis, has been the annual quota of work permits (Medved, 2010), which has not been set since 2010. Another example of protectionist policies in the area of labor migration was the Decree on Restrictions and Prohibition of Employment and Work of Aliens, approved in June 2009 which was in force until the end of 2010, which, for instance, prohibited seasonal work in tourism and construction, severely limited the employment of workers from Kosovo due to perceived abuses of work permits and introduced regional distributions of quotas that stipulated that 95 percent of unused quotas should be distributed among the nationals of Yugoslavia's successor states except Kosovo and the remaining 5 percent among other third-country nationals and Kosovo citizens. The Decree also prohibited the issuance of new permits to representatives of micro and small companies and to representatives of branch offices (Pajnik et al., 2009; Pajnik & Bajt, 2010). Currently, there exist two limitations to the employment of foreign workers in Slovene legislation. First, under the Law on Employment, Self-Employment and Work of Foreigners, employers may be banned from employing foreigners if they have committed labor legislation violations. These employers are banned from employing foreign nationals for one, two, or three years, depending on the legal nature of the violation (Employment Service of the Republic of Slovenia, 2025a). Second, the Employment Service of the Republic of Slovenia is required to conduct a labor-market test to determine whether suitable workers are available in Slovenia. However, for certain professions, such as those in construction, hospitality, retail, transport, health care, pharmacy, and IT, this requirement may be waived, and up to one hundred foreign workers can be employed in these professions without such a test (Employment Service of the Republic of Slovenia, 2025a).

In 2024, the Government of Slovenia adopted the Strategy in the Field of Immigration. The second strategic objective focuses on promoting legal immigration for employment and other forms of work. This objective includes several sub-objectives related to the conclusion of employment agreements, the improvement of the legislative framework, and the monitoring of regulatory implementation in practice. It also addresses removing administrative barriers and simplifying administrative procedures for foreign nationals. A significant part is dedicated to ensuring adequate protection of migrant workers' rights (Ministrstvo za notranje zadeve, 2024). In November 2024, foreign citizens accounted for 15.9 percent of persons in employment excluding farmers; by June 2025, their share had increased to 16.1 percent, while the number of foreign citizens in employment reached its highest level to date (Zidar, 2025a; 2025b). Since 2010, the number of foreigners employed in Slovenia has increased by 156 percent, from 56,650 in 2010 to 144,835 in 2024 (Figure 1). Every sixth economically active person was a foreign national, and more than half were employed or self-employed in construction and manufacturing. Among men, the highest number worked as heavy truck and lorry drivers, and among women, most were employed as cleaners, helpers, and housekeepers in offices, hotels, and other establishments² (Zidar, 2024).

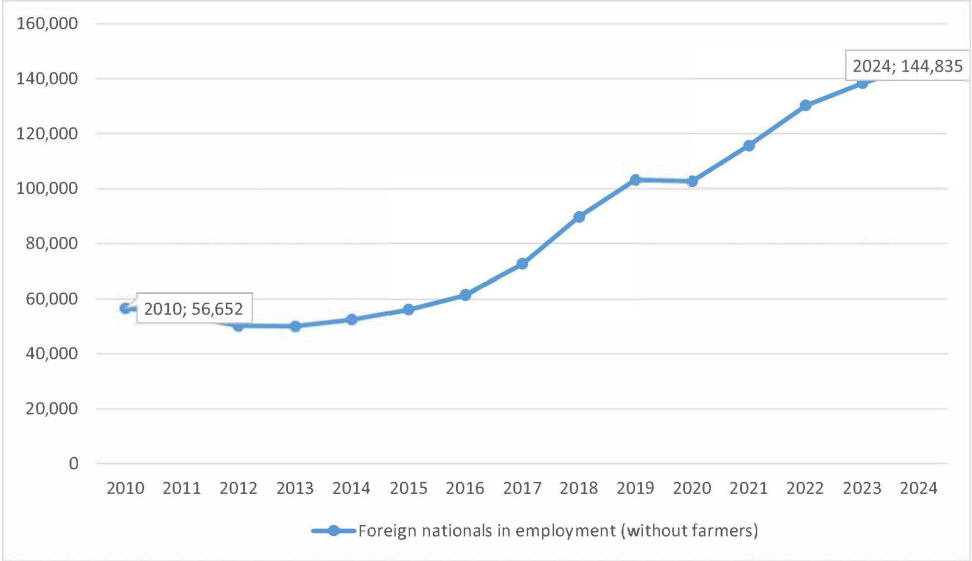


Figure 1: Evolution of the number of foreigners employed in Slovenia, 2010–2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025).

In 2024, the number of employed foreigners was 144,835, out of which 18,442 (13 percent) were EU nationals and 87 percent were third-country nationals (TCNs).

² Data for May 2024.

Almost half of all foreigners employed in Slovenia were nationals of Bosnia and Herzegovina. If only TCNs are considered, the share of Bosnia and Herzegovina nationals was 56 percent, followed by the nationals of Serbia, Kosovo, and North Macedonia. Labor migrants from these four countries accounted for nearly 90 percent of all TCNs in employment in Slovenia.

According to a 2024 study involving 114 Slovenian companies, the principal reasons for employing foreign workers are the shortage of domestic labor and the need to secure employees with the requisite competencies. Additional motivations include ensuring workforce stability amid fluctuations in demand, enhancing diversity to support company growth, and recruiting workers who are more flexible in adapting to variable working hours (e.g., shift or night work). Notably, surveyed employers do not identify cost reduction as a benefit of hiring third-country nationals (Domadenik Muren et al., 2024).

In the public sector—particularly in health care—persistent staff shortages are still being addressed through the recruitment of migrant workers, despite the implementation of various incentives to encourage native students to enter less popular specializations or to take on nursing. Health-care professionals in the Western Balkans, however, are also being targeted by higher-income EU countries, further complicating Slovenian health-care providers' efforts to recruit them. Consequently, individual health-care providers in several Slovenian regions have intensified their recruitment efforts in these countries, either by engaging recruitment agencies or by traveling there themselves to offer employment opportunities (Šestan, 2022). In this case, too, the concern is to secure safe staffing levels rather than reduce staff costs.

LONG-STANDING TREND OF RECRUITMENT FROM THE FORMER YUGOSLAV REGION SUPPLEMENTED BY AN EMERGING INTEREST IN ASIAN COUNTRIES

The increase in the number of employed third-country nationals in Slovenia has been most pronounced among nationals of Bosnia and Herzegovina, whose number has risen by 156 percent since 2010 (Figure 2).

The inflow of workers from Bosnia and Herzegovina has been long-standing and has given rise to extensive migrant networks that at times generate a self-sustaining supply of labor in some sectors (Rodriguez, 2004), which employers can draw upon to manage and regulate labor flows. A combination of push and pull factors shape migration trends between Slovenia and Bosnia and Herzegovina. The labor market in Bosnia and Herzegovina has been affected by political and economic instability, the collapse of key industries, and mismatches between skills and demand. It is also characterized by low wages and a large informal sector, which contribute to workers' vulnerability, including income irregularity and a lack of social security. This has resulted in a significant outflow of workers and consequent persistent labor

shortages. Discouraging economic and political conditions in Bosnia and Herzegovina are contrasted by high labor demand in Slovenia. Slovenia is an appealing option for Bosnian workers due to significantly higher wages, better labor market prospects, familiarity with the language, historical ties, geographical proximity, and, importantly, facilitated immigration procedures (Danaj et al., 2023).

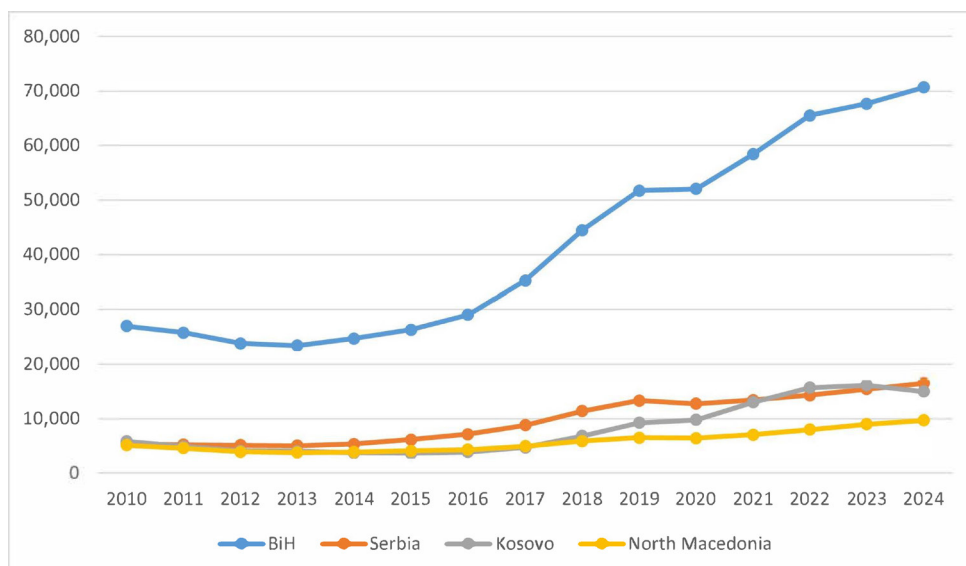


Figure 2: Evolution of the number of employed nationals of Bosnia and Herzegovina, Serbia, Kosovo, and North Macedonia in Slovenia, 2010–2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025).

Recruitment and immigration procedures have been facilitated through bilateral agreements. The two countries signed the Agreement on the Employment of Citizens of Bosnia and Herzegovina in Slovenia in 2012 (in force since 2013). According to the Agreement, Slovenian employers must first post vacancies via the Employment Service of Slovenia. If no suitable candidate is found, the vacancy is forwarded to Bosnia's Employment Service to initiate recruitment. Workers must remain employed by the designated employer for at least one year. If they leave earlier, their work permit may be revoked, except in cases where employment is terminated for reasons beyond their control. After one year, they gain free access to the labor market in Slovenia. Work permits are issued for three years and are renewable for another three years under qualifying conditions.³ Another bilateral agreement in place is the Agreement on the Employment of Citizens of Serbia in

3 The full text of the Agreement between the Government of the Republic of Slovenia and the Council of Ministers of Bosnia and Herzegovina on the Employment of Citizens of Bosnia and Herzegovina in the Republic of Slovenia: https://www.uradni-list.si/_pdf/2012/Mp/m2012092.pdf (pp. 359–369).

Slovenia, adopted in 2018.⁴ Both labor agreements follow a shared design: coordinated recruitment through employment services, multi-year permits, one-year tethering, and post-one-year labor-market freedom. Both also include streamlined permit processes (Danaj et al., 2023).

Amid fears that the “Western Balkans pool” is being drained by other EU countries with more competitive labor-market conditions than Slovenia, the country began turning toward Asian countries as part of a new recruitment strategy. In March 2025, the Slovenia–Philippines bilateral Memorandum of Understanding (MoU)⁵ on labor mobility was signed. The core aim of the MoU is to facilitate the safe, ethical, and transparent deployment of Filipino workers to Slovenia under a government-to-government agreement, starting primarily with care workers who are in high demand in Slovenia. The signing took place in Manila, concurrently with the opening of Slovenia’s first and only embassy in Southeast Asia, marking an important turn in Slovenian bilateral relations (Gov.si, 2025). In October 2025, the two countries further deepened labor cooperation by signing a Joint Declaration of Intent, reaffirming their shared commitment to promote safe, orderly, and ethical labor migration while upholding the rights and welfare of Filipino workers in Slovenia (The Filipino Times, 2025).

Labor migration from Asian countries is not a recent phenomenon. However, its scale has expanded markedly in recent years, especially since 2022. Although the absolute numbers of Asian workers remain lower than those of Bosnian nationals, the growth rate is considerably higher. Within a single year, from 2023 to 2024, the number of employed Nepalese nationals increased by 220 percent, Filipino nationals by 170 percent, Bangladeshi nationals by 126 percent, Indian nationals by 92 percent, and Chinese nationals by 17 percent. By contrast, the number of employed Bosnian nationals rose by only 4.4 percent over the same period. When examined over a longer timeframe, from 2015 to 2024, the growth is even more pronounced (Figure 3).

4 The full text of the Agreement between the Government of the Republic of Slovenia and the Government of the Republic of Serbia on the Employment of Citizens of the Republic of Serbia in the Republic of Slovenia: <https://www.uradni-list.si/glasilo-uradni-list-rs/vsebina/2019-02-0033?utm>.

5 The full text of the MoU between the Republic of Slovenia and the Philippines on cooperation in the field of employment: <https://www.uradni-list.si/glasilo-uradni-list-rs/vsebina/2025-02-0019/uredba-o-ratifikaciji-memoranduma-o-%20soglasju-med-vlado-republike%20slovenije-in-vlado-republike-filipini-o-sodelovanju-na-podrocju-dela>.

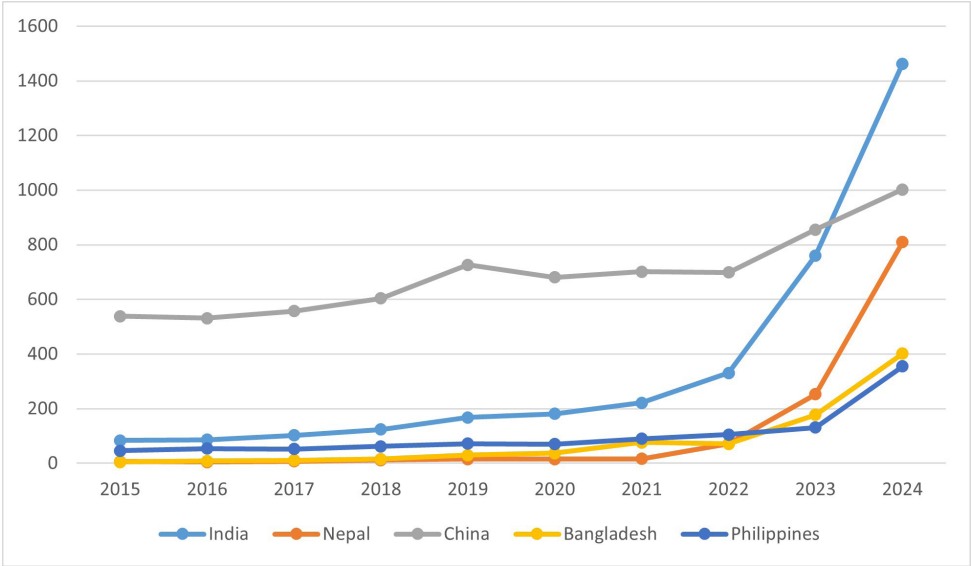


Figure 3: Evolution of the number of employed nationals of India, Nepal, China, Bangladesh, and the Philippines in Slovenia, 2015–2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025).

Sector	2010	2024
Manufacturing/processing activities	9,658	39,683
Construction	25,918	37,811
Transport and storage	5,512	19,344
Trade, maintenance, and repair of motor vehicles	3,006	10,450
Tourism and hospitality	3,165	9,138
Professional, scientific, and technical activities	1,874	4,936
Information and communication activities	431	2,095

Table 1: Employed foreign nationals by sector, Slovenia, 2010 and 2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025).

Traditionally, construction has been the sector with the highest number of foreign workers, as shown in Table 1, which presents the number of employed foreign nationals by sector for 2010 and 2024. In 2010, construction had the highest number of foreign workers, namely 25,918, followed by manufacturing and processing activities (9,658) and transport and storage (5,512). In 2024, the highest number of foreign workers was already employed in the manufacturing and processing activities

(39,683), followed by construction (37,811) and transport and storage (19,344). However, the relative increase in the number of foreign workers has been greatest in manufacturing and processing activities, transport and storage, the trade, maintenance and repair of motor vehicles, tourism and hospitality, and information and communication activities, where these increases have been three- to four-fold. Another important change that concerns specific labor market sectors is the introduction, in 2025, of the possibility of seasonal work (up to 90 days) in hospitality and tourism, in addition to the previously available seasonal work in agriculture (Employment Service of the Republic of Slovenia, 2025b).

Breakdown by nationality for 2024, based on unpublished data provided by the Statistical Office of Slovenia in 2025, shows that the nationals of Bosnia and Herzegovina were mostly employed in the manufacturing sector (22,831), followed by construction (18,738). Serbian nationals were mostly employed in the transport and storage sector (5,343), Kosovar and North Macedonian nationals in the construction sector (10,166 and 2,810, respectively), and Montenegrin nationals in the manufacturing sector (162). The manufacturing sector also employed most Asian workers, specifically, Indian (358), Bangladeshi (162), Filipino (130), and Nepalese (272). The exception is Chinese nationals, who were mostly employed in the hospitality sector (572).

The analysis of labor permits issued to nationals of Bosnia and Herzegovina and Serbia under bilateral agreements in 2024, based on unpublished data provided by the Employment Service of the Republic of Slovenia in 2025, indicates that 40% (7,320) of permit holders had primary or incomplete primary education, while 57% (10,267) had vocational, technical, or general secondary education. In comparison, third-country nationals who were issued single permits for employment in Slovenia generally had lower educational attainment: 76% (19,881) had primary or incomplete primary education, whereas only 15% (3,914) had qualifications equivalent to secondary education. This indicates a sustained demand for low-skilled labor in the Slovenian economy, which also extends to the provision of such workers as posted employees to other European Union Member States to deliver services.

POSTING OF THIRD-COUNTRY NATIONALS BY SLOVENIAN EMPLOYERS TO OTHER EU MEMBER STATES

Posting of workers is a cross-border form of service provision through which workers employed in one European Union (EU) Member State are temporarily sent to work in another Member State, often in response to labor supply-demand imbalances. Posting of workers is regulated by Directive 96/71/EC, commonly known as the Posting of Workers Directive, as amended by Directive (EU) 2018/957. Relevant national laws and regulations concerning the posting of workers apply in addition to the Directive. Which national social security system applies to the posted worker and where

social security contributions need to be paid, is regulated by the Regulation (EC) No 883/2004 (referred to as the Basic Regulation) on the coordination of social security systems and its implementing Regulation (EC) No 987/2009. The provision of services through posting has become one of the most important forms of cross-border labor mobility. In 2023, the total number of postings in the EU and EFTA rose to 5.5 million (+19.5 percent relative to 2022), distributed among an estimated 3.5 million individual persons (+13 percent compared to 2022) (Gasperini et al., 2025).

Slovenia has been one of the main sending Member States of posted workers in the EU. The number of issued PDs A1⁶ and the share of persons in total national employment posted from Slovenia have been on a continuous increase, reaching a peak in 2023, when a total of 176,363 PDs A1 were issued, and 65,590 persons (7 percent of all persons in employment) were posted abroad. In 2024, a decrease in the numbers was recorded after several years of rising, but posting remains an important business endeavor for Slovenian employers (Vah Jevšnik & Toplak, 2025).

Over the years, the posting of workers from Slovenia has been driven by a substantial increase in the number of posted TCNs from the former Yugoslav region, especially nationals of Bosnia and Herzegovina, Serbia, Kosovo, and North Macedonia. Together, these nationalities have consistently accounted for more than 96 percent of all posted TCNs; in 2024, their share was 96.6 percent (Figure 4).

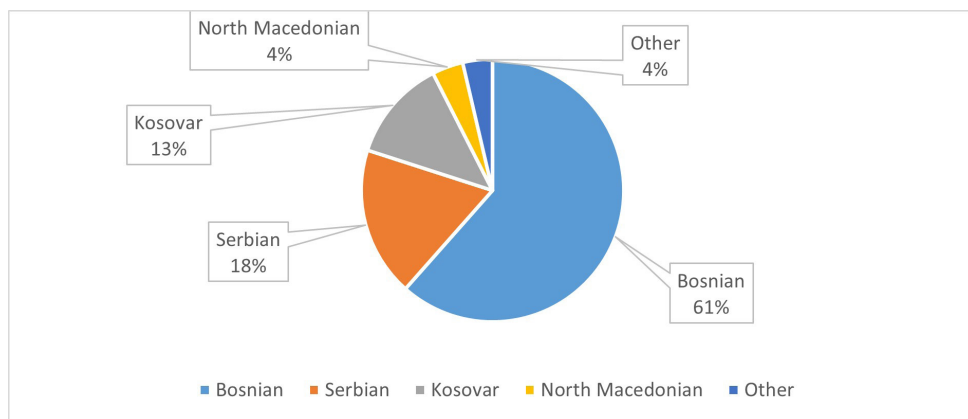


Figure 4: Share of outgoing posted TCNs from Slovenia, by nationality, 2024 (source: own calculations based on unpublished data provided by the Health Insurance Institute of Slovenia, 2025).

In the same year, the nationals of BiH accounted for over 60 percent of all posted TCNs and 39 percent of all persons posted from Slovenia. More than 18 percent of all posted TCNs were Serbian nationals (nearly 12 percent of all persons posted), and

⁶ Posted workers are issued an administrative document A1 (PD A1) that shows they are covered by the social security system of the Member State from which the posting takes place.

13 percent were Kosovars (8 percent of all persons posted) (Table 2). The share of posted Slovenian nationals was 30 percent. This means that fewer Slovenian nationals than Bosnian nationals were posted abroad.

Country	Number	Share in all TCNs (%)	Share in all posted persons (%)
Bosnia and Herzegovina	23,256	61.5%	39.0%
Serbia	6,959	18.4%	11.7%
Kosovo	4,745	12.6%	8.0%
North Macedonia	1,449	3.8%	2.4%
India	385	1.0%	0.6%
Albania	160	0.4%	0.3%
Ukraine	154	0.4%	0.3%
Belarus	132	0.3%	0.2%
Montenegro	126	0.3%	0.2%
Bangladesh	110	0.3%	0.2%
Other third country	313	0.8%	0.5%
Total	37,789	100.0%	63.0%

Table 2: Number of outgoing posted TCNs from Slovenia, by country of nationality, top 10, 2024 (source: own calculations based on unpublished data provided by the Health Insurance Institute of Slovenia, 2025).

The trend of labor migration to Slovenia from the Western Balkans is therefore reflected in the trend of posting of third-country nationals to provide services in the EU. Labor migration from Asian countries is also observed in data on the posting of workers, albeit the absolute numbers remain low. In 2018, Slovenian employers did not post any citizens from the Philippines or India, and only 5 from Bangladesh. In 2024, however, the number of Filipino citizens posted was 13, Bangladeshi 110, and Indian 385. The increase in 2024 compared to 2023 was notable, especially for posted Indian citizens (nearly 170% increase) (Figure 5).

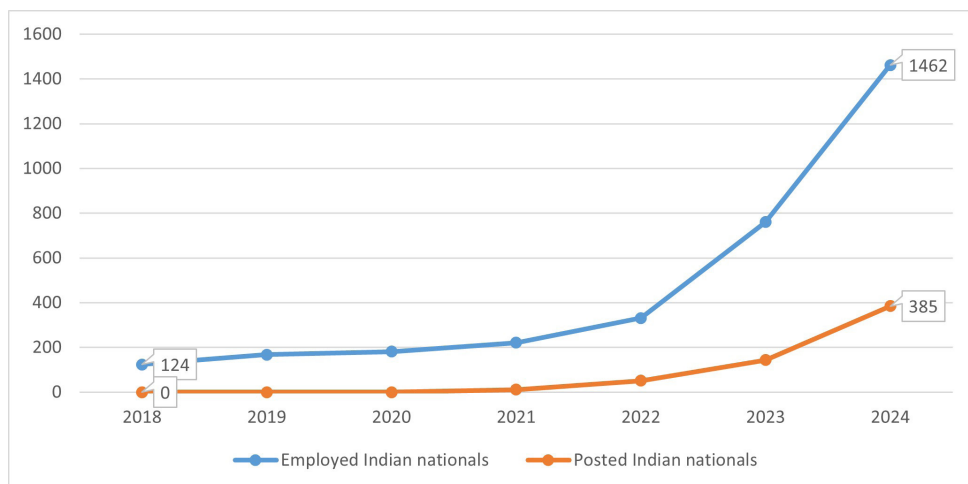


Figure 5: Number of employed Indian nationals in Slovenia and number of posted Indian nationals from Slovenia, 2018–2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025; and the Health Insurance Institute of Slovenia, 2025).

CONCLUSION

Labor migration to Slovenia has undergone significant changes over the last few decades. While Slovenia continues to show a “traditional reliance” on workers from the former Yugoslav region, who still represent the largest group of migrant workers in quantitative terms, there has been, particularly in the last few years, an increased recruitment of workers from South and Southeast Asia. These developments point to increasingly diverse trends in the geographical origins of labor migration to Slovenia. Although other forms of migration, such as forced migration, have become increasingly geographically diversified since 2000, especially during the “refugee crisis” in 2015, labor migration has lagged somewhat behind. It remains an open question to what extent this shift toward diversification in labor migration is a deliberate government and employer strategy, the result of structural demographic imbalances, and/or the perceived and often uncontested “emptying” of the “pool of workers” from the Western Balkans. However, the finding by Josipović and Trbanc (2012) that the sectors that contributed most to economic growth in Slovenia were construction, manufacturing, and retail sectors, where low-skilled and low-wage jobs are mostly concentrated, seems important in this regard, as these are the sectors that employ a high number of migrant workers also in Slovenia. As Menz (2015) shows, the language of competitiveness and the purported exigencies of the global economy advance political goals that might otherwise encounter significant political opposition. For instance, governments and businesses have sought to advance increasingly liberalized labor migration schemes linking them

to the prerogative of economic competitiveness despite a prevailing anti-immigration political climate. Anderson (2010) also claims that immigration controls shape the types of labor with particular relations to employers and to labor markets. Such could be the stipulations of the bilateral agreements on employment with Bosnia and Herzegovina and Serbia that the worker must remain with the same employer for a year before being able to change jobs, and the introduction of seasonal work in hospitality, which could channel migrant workers into short-term and generally more precarious employment arrangements. This could pose additional integration challenges and provide an important avenue for future research, particularly regarding the integration of new migrant groups from Asia.

ACKNOWLEDGMENTS AND ADDITIONAL INFORMATION

The Slovenian Research and Innovation Agency supported this work through grants for the research projects titled Challenges of International Labor Mobility in a National Context: The Case of Slovenia (grant number J5-50182) and Migrants' Emplacement at the Micro-Level: Restaurants as Contact Zones (grant number J6-60098). The Slovenian Research and Innovation Agency supported this work through grants for the research programs Studies on Distress and Being Well (grant number P5-0439) and National and Cultural Identity of Slovenian Emigration in the Context of Migration Studies (grant number P5-0070).

RESEARCH DATA ACCESSIBILITY STATEMENT

The authors state that the research data used in the article are held by the authors and are available upon reasonable request.

REFERENCES

- Anderson, B. (2010). Migration, immigration controls and the fashioning of precarious workers. *Work, Employment and Society*, 24(2), 300–317. <https://doi.org/10.1177/0950017010362141>
- Anderson, B., & Ruhs, M. (2010). Migrant workers: Who needs them? A framework for the analysis of staff shortages, immigration and public policy. In M. Ruhs & B. Anderson (Eds.), *Who Needs Migrant Workers? Labour shortages, immigration, and public policy* (pp. 15–56). Oxford Academic. <https://doi.org/10.1093/acprof:oso/9780199580590.003.0002>
- Banka Slovenije. (2025, September). *Review of macroeconomic developments, September 2025*. <https://www.bsi.si/en/publications/p/review-of-macroeconomic-developments-september-2025>
- Bučar Ručman, A. (2025). Analiza priseljevanja v Slovenijo iz (in preko) držav nekdanje SFRJ z uporabo eklektičnega modela mednarodnih migracij. *Dve domovini / Two Homelands*, 62, 101–124. <https://doi.org/10.3986/2025.2.6>
- Danaj, S., Vah Jevšnik, M., Kielbasa, M., & Szaraniec, M. (2023). There and gone again? Migration to and posting of third-country nationals from Slovenia and Poland. *European Labour Law Journal*, 14(3), 391–420. <https://doi.org/10.1177/20319525231165851>
- Domadenik Muren, P., Franca, V., Končan, H., Wudler, L., Fratnik Andrić, L., Smrekar, M., & Filipov, B. (2024). *Encouraging employment of third-country nationals through social dialogue*. Recruit4Tomorrow project. <https://www.zds.si/assets/files/D2.2-Recruit4Tomorrow-Comparative-analysis-report-final.pdf>
- EURES. (2024, December 3). Labour shortages and surpluses in Europe. https://eures.europa.eu/living-and-working/labour-shortages-and-surpluses-europe_en#paragraph_5172
- Employment Service of the Republic of Slovenia. (2025a, December 7). *Kontrola trga dela* [Control of the labour market]. <https://www.ess.gov.si/delodajalci/zaposlovanje-tujcev-iz-tretjih-drzav/kontrola-trga-dela>
- Employment Service of the Republic of Slovenia. (2025b, December 3). *Sezonsko delo do 90 dni* [Seasonal work up to 90 days]. <https://www.ess.gov.si/delodajalci/zaposlovanje-tujcev-iz-tretjih-drzav/delovna-dovoljenja/sezonsko-delo-do-90-dni/>
- Gasparini, M., Cinova, D., Petracco, C., Truc, M., Carletti, G., & Geraci, M. (2025). *Annual report on intra-EU labour mobility: 2024 edition*. Publications Office of the European Union. <https://doi.org/10.2767/2077850>
- Gov.si. (2025, March 11). *Slovenia and the Philippines are opening a new chapter in bilateral relations*. <https://www.gov.si/en/news/2025-03-11-slovenia-and-the-philippines-are-opening-a-new-chapter-in-bilateral-relations>
- Institute of Macroeconomic Analysis and Development. (2025, December 9). *Projekcije EUROPOP2023 in demografska slika Slovenije* [Projections EUROPOP2023 and

- demographic picture of Slovenia]. <https://www.umar.gov.si/publikacije/kratke-analize/publikacija/projekcije-europop2023-in-demografska-slika-slovenije>
- Josipovič, D. (2006). *Učinki priseljevanja v Slovenijo po drugi svetovni vojni*. ZRC SAZU, Založba ZRC.
- Josipovič, D., & Trbanc, M. (2012, April). *Social impact of emigration and rural-urban migration in Central and Eastern Europe: final country report: Slovenia*. European Commission, DG Employment, Social Affairs and Inclusion. <https://ec.europa.eu/social/BlobServlet?docId=8830&langId=en>
- Knezević Hočevar, D. (2011). Obrazi migracij v govoru o rodnosti [Faces of Migration in Discussions about Fertility]. *Dve domovini / Two Homelands*, 33, 7–22. <http://www.dlib.si/details/URN:NBN:SI:DOC-SOPUJN4V>
- Knezević Hočevar, D., & Cukut Krilić, S. (2019). Contestable demographic reasoning regarding labour mobility and migration. *Dve domovini / Two homelands*, 50, 131–146. <https://doi.org/10.3986/dd.v2019i50.7462>
- Menz, G. (2015). Framing competitiveness: the advocacy of migration as an essential human resources strategy in Europe. *Journal of Ethnic and Migration Studies*, 42(4), 625–642. <https://doi.org/10.1080/1369183X.2015.1102040>
- Ministrstvo za notranje zadeve. (2024, March). *Strategija Vlade RS na področju priseljevanja* [Strategy of the Government of the Republic of Slovenia in the field of immigration]. Vlada Republike Slovenije. <https://www.gov.si/assets/ministrstva/MNZ/SOJ/Novice/Strategija-vlade-RS-na-podrocju-priseljevanja.pdf>
- OECD. (2024). *OECD Economic Surveys: Slovenia*. OECD Publishing. <https://doi.org/10.1787/bc4a107b-en>
- Pajnik, M., Bajt, V., & Herič, S. (2009). *Mapping and evaluating migration and integration policies: the case of Slovenia -working paper No. 2*. Mirovni Inštitut, http://prints.mirovni-institut.si/images/pdf/working_papers/swp2_slovenia.pdf
- Pajnik, M., & Bajt, V. (2010). Migrant remittances in times of economic decline: coping with protectionist policies in Slovenia. *Migration Letters*, 7(2), 179–189. <https://doi.org/10.33182/ml.v7i2.191>
- Piore, M. (1979). *Birds of passage*. Cambridge University Press.
- Rodriguez, N. (2004). “Workers wanted”: Employer recruitment of immigrant labor. *Work and Occupations*, 31(4), 453–473. <https://doi.org/10.1177/0730888404268870>
- Stark, O., & Bloom, D. E. (1985). The new economics of labor migration. *The American Economic Review*, 75(2), 173–178.
- Szelewa, D., & Polakowski, M. (2022). European solidarity and “free movement of labour” during the pandemic: exposing the contradictions amid east–west migration. *Comparative European Politics*, 20, 238–256. <https://doi.org/10.1057/s41295-022-00287-4>
- Šestan, U. (2022, November 12). *Direktor ZD Velenje na lastno iniciativo in stroške po zdravnike v BiH* [Director of CHC Velenje to get doctors in BiH on his own initiative

- and at his own expense]. <https://www.24ur.com/novice/slovenija/direktor-zd-velenje-bo-na-lastno-iniciativo-in-stroske-zdravnike-iskal-v-bih.html>
- The Filipino Times. (2025, October 24). *Philippines, Slovenia ink joint declaration to strengthen labor cooperation*. <https://filipinotimes.net/latest-news/2025/10/24/philippines-slovenia-ink-joint-declaration-to-strengthen-labor-cooperation/>
- Vah Jevšnik, M., Cukut Krilić, S., & Toplak, K. (2022). *Posted workers from Slovenia: Facts and figures*. POSTING.STAT project. https://isim.zrc-sazu.si/sites/default/files/Posted%20workers%20from%20Slovenia.%20Facts%20and%20figures_0.pdf
- Vah Jevšnik, M., & Toplak, K. (2025). *Posted workers from and to Slovenia: Facts and figures*. POSTING.STAT 2.0 project. <https://hiva.kuleuven.be/en/research/theme/welfarestate/p/Docs/posting-stat-country-report-slovenia-amended.pdf>
- Zidar, M. (2024, July 16). *Highest number of persons in employment, increase in foreign citizens*. <https://www.stat.si/StatWeb/en/news/Index/12986>
- Zidar, M. (2025a, January 16). *Share of foreign citizens among persons in employment at its highest to date*. <https://www.stat.si/StatWeb/nk/news/Index/13370>
- Zidar, M. (2025b, August 19). *In June, more persons in employment, including the highest number of foreign citizens to date*. <https://www.stat.si/StatWeb/en/News/Index/13786>

POVZETEK

NOVE OBLIKE DELOVNIH MIGRACIJ V SLOVENIJO: OD ZAHODNEGA BALKANA DO AZIJE

Mojca Vah Jevšnik, Sanja Cukut Krilić

Na področju delovnih migracij v Slovenijo je prišlo do premika od več desetletnega zanašanja na delavce iz nekdanjih jugoslovanskih republik v fazo vse bolj raznolikih oblik zaposlovanja tujcev, med katere sodi tudi hitro rastoče zaposlovanje iz Južne in Jugovzhodne Azije. Z vztrajno in strukturno kadrovsko vrzeljo – pogojeno z demografskim upadom, nizko brezposelnostjo, staranjem prebivalstva ter nizko privlačnostjo določenih sektorjev za »lokalne« delavce – se je okrepila konkurenca tako na domačem trgu kot evropskem trgu delovne sile. To je delodajalce in državo spodbudilo k razširitvi nabora potencialnih delavcev. V preteklosti je slovensko povpraševanje po delovni sili zadovoljevala gosto prepletena mreža migracijskih tokov iz Bosne in Hercegovine, Srbije, Kosova in Severne Makedonije, pri čemer sta dvostranska sporazuma z Bosno in Hercegovino ter Srbijo omogočala institucionalizirane oblike zaposlovanja tujih delavcev. Ti migracijski kanali so po absolutnih številkah sicer še vedno prevladujoči, delavci iz teh držav pa še naprej zasedajo osrednja delovna mesta v gradbeništvu, predelovalnih dejavnostih, prometu in drugih delovno intenzivnih sektorjih, vključno z napotitvami v druge države članice EU. Ker pa delavce iz Zahodnega Balkana vse intenzivneje zaposlujejo tudi druge države EU in se tradicionalni bazen delovne sile postopoma oži, se je Slovenija v zadnjih letih začela usmerjati k azijskim državam. Prihodi delavcev iz Indije, Nepala, Bangladeša, Kitajske in Filipinov so se od leta 2022 izrazito povečali. To diverzifikacijo so dodatno utrdili novi politični ukrepi, zlasti memorandum o soglasju s Filipini ter odprtje slovenskega veleposlaništva v Manili, kar kaže na institucionalni premik k bolj formaliziranim, državno podprtim oblikam zaposlovanja. Avtorici v prispevku argumentirata, da ti procesi ne predstavljajo kratkoročnih nihanj, temveč odražajo širše strukturne premike, saj demografske projekcije napovedujejo trajno zmanjševanje delovno aktivnega prebivalstva, ki ga brez priseljevanja ne bo mogoče nadomestiti. Nastajajoča slovenska migracijska krajina tako združuje kontinuiteto – trajno odvisnost od Zahodnega Balkana – z novo fazo globaliziranega in razpršeneega zaposlovanja tuje delovne sile.

UNDESIRABLE REVERSE REMITTANCES: THE CASE OF YOUNG UKRAINIAN STUDENTS IN CZECHIA

Luděk Jirka¹

COBISS: 1.01

ABSTRACT

Undesirable Reverse Remittances: The Case of Young Ukrainian Students in Czechia

This article explores the interplay between instrumental migration aspirations and reverse remittances within transnational families. Based on semi-structured interviews with young Ukrainian migrants who moved to Czechia at ages 15–16, the article suggests that, after an initial phase of settling in and adapting, participants show a desire for financial independence from their non-migrating parents. Thus, their aspiration for independence is grounded in a deliberate rejection of transnational financial dependence on their families. This sheds light on how family financial support may be perceived as undesirable for individual migration aspirations.

KEYWORDS: student migration, instrumental migration aspirations, transnational family, independence, reverse remittances

IZVLEČEK

Nežželena povratna denarna nakazila: primer mladih ukrajinskih študentov na Češkem

Avtor v prispevku raziskuje povezavo med t. i. instrumentalnimi migracijskimi težnjami (željami po selitvi zaradi izobraževanja) in povratnimi denarnimi nakazili v transnacionalnih družinah. Na podlagi podatkov iz polstrukturiranih intervjujev z mladimi ukrajinskimi migranti in migrantkami, ki so se na Češko preselili v starosti 15–16 let, ugotavlja, da si sogovorniki, ki so se preselili, po začetni fazi prihoda in prilagajanja želijo postati finančno neodvisni od svojih staršev, ki niso odšli v tujino. Prizadevajo si torej za neodvisnost, ki temelji na zavestnem zavračanju transnacionalne finančne odvisnosti od svojih družin. S tem avtor pokaže, kako je lahko v okviru individualnih migracijskih ambicij finančna podpora družine dojeta kot nežželena.

KLJUČNE BESEDE: migracije študentov, instrumentalne migracijske težnje, transnacionalna družina, neodvisnost, povratna denarna nakazila

¹ PhD in anthropology; University of Hradec Králové, Faculty of Education, Department of Studies in Culture and Religion, Hradec Králové; ludek.jirka@uhk.cz; ORCID <https://orcid.org/0000-0002-2630-4550>

INTRODUCTION

Since 2022, Ukrainians in migration studies have been primarily associated with temporary protection. However, Ukrainian student migration to the European Union (EU) prior to the full-scale Russian invasion of Ukraine is also relevant for scholarly attention, particularly in the context of the global growth of student migration. In the Czech context, the migration of Ukrainian students to Czechia is a part of broader Ukrainian migration to the country. Following the dissolution of the Soviet Union in 1991, independent Ukraine experienced a rather unsuccessful transition from a centrally planned to a market-oriented economy, whereas Czechia underwent a comparatively successful transformation. Due to its economic attractiveness and cultural and linguistic proximity, Czechia became a destination country for Ukrainian immigration (Drbohlav, 2010). During the 1990s, Ukrainians migrated primarily for economic reasons, and Czechia's *laissez-faire* migration policy enabled their entry. However, in 1999, due to the harmonization of migration policy with the European Union, Czechia introduced visa restrictions. At the same time, student migration from Ukraine to Czechia began to increase, and Ukrainian students were required to obtain a long-term study visa (Jirka, 2021).

The number of foreign students enrolled in Czech secondary schools increased steadily from 6,317 in the 2007/2008 school year to 21,227 in the 2024/2025 school year. In 2024/2025, the percentage of foreign students among all students at Czech secondary schools was 4.1% (Czech Statistical Office, 2025b). The majority of foreign students in 2016/2017 were enrolled in high schools, and Ukrainians constituted the largest group of third-country nationals (73.3%). Together with students from Vietnam and Russia, they accounted for 59% of all foreign students in Czech secondary education (Czech Statistical Office, 2017). In 2024/2025, Ukrainians accounted for 60.4% of foreign students at secondary schools, followed by Slovaks (11.9%) and Vietnamese (11.1%) (Czech Statistical Office, 2025a). Ukrainian students typically studied in the Czech language due to linguistic proximity. Most originated from Western Ukraine owing to the region's geopolitical orientation toward the European Union. However, after the outbreak of the war in Eastern Ukraine in 2014, students from other Ukrainian regions also began to arrive (Drbohlav & Jaroszewicz, 2016).

Despite the relevance of foreign students in Czech secondary education, scholarly attention has primarily focused on Ukrainian students enrolled at universities in Czechia (Leontiyeva & Kopecká, 2018; Velychko & Yaremenko, 2020). This student migration is often driven by the political and economic situation in their home country, while simultaneously perceiving Czechia as an economically developed state where they can obtain an education and a diploma that facilitate employment within the European Union. At the same time, they also value the more favorable environment of Czech educational institutions (Leontiyeva & Kopecká, 2018). Nevertheless, this article departs from the predominant focus on Ukrainian university students by examining their counterparts in secondary schools. While this phenomenon is rarely

studied in the Czech context, scholars in other European countries have focused on it (see Fog Olwig, 2007).

This research focuses specifically on Ukrainian students from the Rivne and Zhytomyr Regions who migrated at the age of 15–16 to attend secondary schools in Uničov, a small town in the Olomouc Region of Czechia. The preconditions for the arrival of Ukrainian students in Uničov date back to the 1990s, when short-term curative summer stays in Czechia were organized for descendants of the Czech diaspora living in Ukraine. These stays were part of humanitarian assistance provided to members of Czech diasporic communities from areas affected by the Chernobyl disaster in 1986. However, many participants in these stays were Ukrainians without Czech ancestry, yet they still attended through membership in Czech diasporic associations (which do not require Czech origin). Moreover, many descendants of the Czech diaspora had gradually lost a Czech ethnic identity and identified as Ukrainians. In 2011, a teacher from the high school in Uničov who co-organized the summer stays began offering prospective participants the opportunity to study at her school, primarily in response to the declining number of Czech students in Uničov. Together with colleagues from the local high school and the secondary technical school, she also sought to recruit additional Ukrainian students during subsequent visits to Czech diasporic associations and educational institutions in the Rivne and Zhytomyr Regions. Detailed data on the number of foreign students studying in Uničov is not available in official statistics. However, according to the author's own estimates, the number reached approximately 40 Ukrainian students. Most originated from Western Ukraine, with five students from Odesa (Southern Ukraine) and three from Kyiv (Central Ukraine).

It should be noted that the migration route for these students was not straightforward. At the Czech Embassy in Lviv, their parents had to apply for a long-term study visa, demonstrate sufficient financial means, and arrange accommodation in Uničov. Only families with adequate financial resources—typically middle class or higher—were able to take this opportunity. There may also be a strategic rationale behind this migration trajectory related to the possibility of obtaining permanent residence (Leontiyeva & Kopecká, 2018). A long-term study visa can lead to permanent residence in Czechia after ten years of study, which usually exceeds the time students spend in secondary school (typically four years) and later at university (typically five years). Consequently, the common strategy for Ukrainian students is to transition from student status to employment or entrepreneurship to secure a residence permit (Leontiyeva & Kopecká, 2018). Before 2019, this transition was often stressful, as students needed to secure employment or start a business rapidly to avoid losing both their student/employment status and residence permit. In 2019, however, the Czech government introduced the long-term residence permit for the purpose of seeking employment or starting a business start-up, which allows graduates to remain in the country for up to nine months while searching for employment.

Participants for this research were selected from the students studying in Uničov. It is worth noting that while some participants were encouraged by their parents to migrate,¹ others made the decision voluntarily with an instrumental means-to-end perspective. By instrumental perspective, we mean a desire to migrate in order to achieve specific goals, such as education or improved welfare (De Haas, 2021), and this article focuses on participants with such objectives. Although their migration pathways differed, all participants (except one²) were the first members of their families to migrate from Ukraine. Parents typically remained in Ukraine and provided transnational support to their children. An exception was five parents who resided in other European countries or Moscow, though they also supported their children from a distance.

Participants expressed aspirational goals that were primarily individualistic, yet they continued to receive transnational financial support from their parents through reverse remittances. These remittances function not only as financial resources but also carry a social dimension of care within transnational families. Therefore, the main research questions are: (1) how participants express instrumental migration aspirations and (2) how these migration aspirations intersect with reverse remittances. The sub-question is: (1) how participants (un)accept this parental care and support. The following sections present the theoretical framework, methodology, and findings.

THEORETICAL IMPLICATIONS

Traditional migration theories (push and pull factors, the neoclassical theory of migration, and historical-structural approaches) tend to depict migrants as actors pushed by external forces (Carling & Collins, 2018). While these theories emphasize economic reasoning and adopt a conventional or state-centered perspective, they also reduce migrants' decision-making to deterministic logic (Carling & Collins, 2018; De Haas, 2021). Consequently, they overlook bottom-up perspectives, fail to recognize migrants' self-representations, and are unable to capture migrants' realities.

Scholars call for studying migration from a bottom-up perspective as a social and human-centered process. The notion of migration aspirations aligns with this approach. Migration aspirations, in a broad sense, can be defined as subjective preferences regarding life and opportunities elsewhere (De Haas, 2021). Aspirations differ from capabilities, which refer to migrants' ability to realize their migration ambitions (Carling, 2014). Thus, aspirations represent desires or plans to migrate, whereas capabilities denote the practical ability to do so (Carling, 2025). Migration

1 Hein De Haas used the term "forced." Although this term is appropriate in some contexts, given the recent war in Ukraine, it could be misleading; therefore, "encouraged" is a more suitable choice.

2 One participant already had a brother living in the Czech Republic.

aspirations, as part of people's broader and flexible life aspirations (Carling, 2014), are shaped by various objectives, expectations, or possible achievements (Van Hear et al., 2018). They are also embedded in specific social contexts, which influence both individuals' ambitions and their capabilities to act (Collins, 2018; Carling & Schewel, 2018; De Haas, 2021; Van Mol et al., 2018).

Migration aspirations encompass both instrumental and intrinsic dimensions (Carling, 2025). The instrumental dimension refers to a means-to-end orientation, in which migrants may consider and plan actions to achieve their personal goals (Carling & Schewel, 2018), such as improving their standard of living, attaining education, or securing better income, as part of their self-realization (De Haas, 2021). The intrinsic dimension, by contrast, concerns migration motivated by personal fulfillment, curiosity, or the desire to explore new horizons (Carling, 2025). In this research, participants (though not all) primarily show the instrumental dimension of migration aspirations (see Table 1). In this sense, migration aspirations are closely linked to articulated desires, and migrants should be encouraged to speak for themselves (Ghorashi et al., 2018), thereby providing their own self-representations through narratives.

The family unit plays a significant role in shaping migration aspirations and achievements. Family members may mediate migration decisions and trajectories (Collins, 2018), but the family's social and economic conditions also influence or trigger migration goals (Van Hear et al., 2018). However, the influence of the family on migration aspirations is often discussed negatively. Some scholars argue that family dynamics may negatively affect individual migration aspirations (De Haas & Fokkema, 2010; Mata-Codesal, 2018; Vezzoli, 2023), as personal ambitions often have to contend with restrictive family expectations (Rodriguez-Pena, 2022; 2024). Accordingly, family influence may be understood as a "limitation" on the pursuit of personal goals. At the same time, other authors discussed that individuals may altruistically fulfill family expectations (Müller-Funk et al., 2023; Vezzoli, 2023) or report satisfaction with these expectations (Schiefer et al., 2023). In that regard, this article focuses on this interplay between the family unit and participants' migration aspirations.

Migration aspirations are commonly studied in the pre-migration phase; therefore, the notion of "family as limitation" is typically associated with familial influence prior to departure. In contrast, this article emphasizes the development and transformation of migration aspirations throughout the migration process (Boccagni, 2017; Van Helsum, 2017), as well as their implications for transnational family support. Migration aspirations are dynamic and continuously evolving—an insight that is central to this study.

The term transnational family is a part of the broader discussion of transnational ties in migration studies. The concept of transnationalism originally emerged as a response to methodological nationalism, the tendency to analyze migrants through the lens of their inclusion into the receiving state. However, migrants cannot be

studied solely in terms of their inclusion in the host country, as they often maintain economic, political, social, and cultural ties to their country of origin. These cross-border connections have been conceptualized as a *transnational social field* (Basch et al., 2003) or a *transnational social space* (Faist, 2000), among other related terms. Despite certain methodological shortcomings identified in the literature (Waldinger & FitzGerald, 2004), transnational ties remain a central concept in migration studies.

Transnational ties take various forms. Political transnational ties involve efforts to influence political developments in the country of origin, either at the national or local level (Lacroix et al., 2016); cultural ties concern changes of traditional values within the society in country of origin (Goździak & Main, 2020; Krofl, 2017); economic ties typically refer to sending remittances back to the country of origin (Carling & Hoelscher, 2013; Morad & Gombač, 2015); while social ties encompass migrants' connections and bonds with family members or the broader community in the country of origin (White & Grabowska, 2018). The political, cultural, and social impacts on the country of origin are also referred to as *social remittances* (Levitt, 2001; 2015; White & Grabowska, 2018). Furthermore, these forms of transnational ties are not isolated, as they are interrelated. For example, economic ties are often linked to social ties, as financial support reflects family and community relations.

A transnational family consists of family members residing in two countries—the country of origin and the country of destination. The term is commonly used to describe situations in which migrants provide financial support (remittances) or material goods (such as gifts) to family members who remain in the country of origin. The social connections maintained through phone calls, visits, social media, and other forms of communication are also important. These ties also underpin transnational care arrangements between those who migrate and those who stay behind (Sørensen & Vammen, 2014).

For the purpose of this article, reverse remittances, as part of economic transnational ties, are of particular interest. Unlike traditional remittances, which are sent from the country of destination to the country of origin, reverse remittances move in the opposite direction. They are often associated with financial support for students studying abroad (UI Abdin, 2025) or with securing investments (Mazzucato, 2011). Beyond their economic function, reverse remittances also have a social function (Carling & Hoelscher, 2013). For instance, paid childcare services can be interpreted as investments in children (Mazzucato, 2011). In this sense, reverse remittances are not only financial contributions but also carry social significance. To sum up, this article examines family care in the form of reverse remittances and explores how they relate to participants' migration aspirations.

METHODOLOGY

The interviewees were young Ukrainians, aged 15–16 at the time of migration, who moved unaccompanied to Uničov. Participants were selected based on two criteria: first, they study at either the high school or the secondary technical school in Uničov; and second, their parents either remained in Ukraine or did not reside and work in Czechia. Saturating the research sample required a long time, as Ukrainian students were gradually enrolled in secondary schools in Uničov over several years. In total, 19 interviews were conducted between 2014 and 2021. All participants were born in the Rivne and Zhytomyr Regions.

The majority of interviews were conducted while participants were still enrolled in secondary schools in Uničov. Two interviews took place after participants had begun their university studies. Furthermore, one interview was conducted prior to a participant's enrollment in high school. All interviews were conducted in Czech, as the participants had either learned the language during their secondary education in Czechia or had studied Czech prior to their enrollment. It should be noted, however, that their level of proficiency varied.

Meetings were arranged in Czechia and Ukraine (see Table 1). In Ukraine, six interviews were conducted during the summer holidays in participants' hometowns. This provided an opportunity not only to speak with participants' parents in person but also to gain insight into the living conditions and household or hometown circumstances of the participants. In Czechia, most interviews took place in Uničov, while one interview was conducted in Olomouc and another in Brno during participants' university studies.

The war in Eastern Ukraine, which began in 2014, influenced participants' perspectives. Many expressed stronger nationalistic views and anti-Russian attitudes, attributing responsibility for the conflict to Russia. The full-scale Russian invasion of Ukraine occurred in 2022, but all interviews were conducted before that date.

A qualitative methodology was employed, using semi-structured interviews as the primary data collection method. This method is well-suited to research on migration aspirations, as it allows exploration of subjective attitudes, personal values, life trajectories, and individuals' interpretations of migration. Therefore, semi-structured interviews are a suitable method for examining participants' migration ambitions (Carling & Schewel, 2018).

The same core set of specific interview questions was used for each participant, with additional questions asked during each interview. The purpose of these questions was to explore participants' migration aspirations regarding staying in Czechia, their perceptions of student status, their experiences in both Ukrainian and Czech environments, their interpretations of the migration pathway, and the influence of the transnational family on their lives. Only a few questions focused on participants' backgrounds prior to migration. In this regard, participants were asked about their parents and their parents' occupations, parental migration aspirations, and family

living conditions before leaving Ukraine. Additionally, the author’s encounters with parents during visits in Ukraine provided further insight into participants’ lives before migration. Following data collection, the author employed thematic analysis to identify recurring patterns. Coding and categorization were conducted manually, without using software.

Table 1 shows that twelve participants migrated instrumentally, while seven were deliberately encouraged by their parents to migrate. Participants who migrated instrumentally often persuaded their parents of the appropriateness of their migration, whereas those who were encouraged migrated largely due to parental influence.

In accordance with ethical guidelines, parents were informed about the study and asked to provide consent for their children’s participation. For participants under 18 years of age at the time of the interview, parents signed informed consent on their behalf. Participants who were over 18 at the time of the interview signed their own informed consents. This complies with Czech legislation. Participants were assured of their anonymity in the study, and fictitious names were used throughout the article. Interviews were transcribed and stored in the author’s personal archive and at the University of Hradec Králové. Observations and unrecorded notes from informal conversations with participants were documented in a field diary. Additionally, the author spent one month in Uničov to become familiar with the local social and economic environment. The author’s fluency in Ukrainian further reduced the possibility of misunderstandings during the interviews.

Participant	Encouraged by parents (E), Instrumentally (I)	Country of interview
Lera	I	Ukraine
Julja	I	Ukraine
Valeria	I	Ukraine
Albina	I	Czechia
Elena	E	Czechia
Nikolaj	E	Ukraine
Alexander	I	Czechia
Viktoria	E	Czechia
Anna	E	Czechia
Ivan	E	Czechia
Jana	I	Czechia
Lara	I	Czechia
Evdokia	I	Czechia
Vasyl	I	Czechia

Denis	E	Ukraine
Olena	I	Ukraine
Vladyslav	E	Czechia
Jaroslava	I	Czechia
Emma	I	Czechia

Table 1: Division of participants by migration aspirations and location of interview

RESULTS AND DISCUSSION

Why Did Most Participants Migrate Instrumentally?

Participants resettled in Czechia, while their parents typically remained in Ukraine. According to participants’ interpretations, their parents’ motives for staying were generally reasonable. They held stable jobs or ran businesses, cared for their own parents, or were accustomed to local living standards. Thus, unlike the participants, parents were described as having non-migration aspirations, reflecting generational differences regarding migration from Ukraine (Roberts, 2009). Family reunification in Czechia was not pursued—at least at the time of the research. Although the majority of parents remained in Ukraine, five resided in France, Great Britain, or Moscow, where they were employed in low-skilled jobs. In terms of social class, most parents may be described as middle class within the Ukrainian context (such as accountants, teachers, truck drivers); some belonged to the upper-middle class (such as doctors or entrepreneurs), while others earned income from low-skilled employment abroad. However, the sample also included one participant whose parents were divorced; her father was not involved in her upbringing, and her mother worked as a postal worker. For this participant, securing sufficient financial resources was more challenging. Nevertheless, her grandfather, who was employed abroad, decided to provide financial support. Otherwise, participants did not report significant financial problems.

Participants were also asked about their living conditions prior to migration. While some were satisfied with their lives in Ukraine, others cited difficult living conditions that led them to migrate. Their answers were associated with social insecurity, unemployment, poverty or corruption, factors recognized as persistent problems in Ukraine (Walker & Stephenson, 2010; Ivashchenko, 2021). For instance, the father of one participant worked as a doctor in a public healthcare institution but became seriously ill. Due to the state’s limited social support, the family experienced significant financial problems. As the participant stated, this experience led her to the conviction that Ukraine would “never be a normal state.” Experiences from curative short-term stays in Czechia also influenced participants’ desire to migrate as they observed living standards of their peers in Europe (see Nikolayenko, 2011). They often compared their hometowns with Czech localities. One participant, for

example, noted that there was no swimming pool in Dubno, while she appreciated the modern swimming pools available in Czechia.

Aside from the above-mentioned factors, participants who migrated instrumentally typically justified their decision by referring to a perceived “no future” in Ukraine, a desire to distance themselves from parental rules and norms (it should be noted that they were still adolescents at the time of migration), a wish to obtain a diploma within the European Union and live in a country with higher living standards. The last two factors do not distinguish their perceptions from those of Ukrainian students studying at Czech universities (Leontiyeva & Kopecká, 2018). Regarding the war in Ukraine, which began in 2014, participants noted that it was an important factor shaping their parents’ attitudes toward the participants’ potential migration. During small talks, parents also mentioned that the political and economic situation in Ukraine had been deteriorating since the 1990s.

Upon arrival in Uničov, participants who migrated instrumentally expressed interest in educational or work opportunities and in opportunities for self-realization. In contrast, participants who were encouraged by their parents to migrate often preferred to remain in their place of birth in Ukraine but did so under parental pressure. The following findings refer to participants who migrated instrumentally, as those who were encouraged experienced their migration trajectories differently.

Reverse Remittances as a Limitation for Instrumental Acting

Participants’ studies were possible primarily through parental reverse remittances—that is, money sent from Ukraine to their descendants in Czechia—amounting to approximately €200 per month.³ It should be noted that this amount increased for students who arrived between 2019 and 2021. For these students, parental financial support amounted to approximately €300–350 per month. As education in secondary schools in Czechia is free, this money covered basic expenses such as accommodation and food, and was particularly useful in the first months after migration (Ul-Abdin, 2025). Most participants resided in a dormitory owned by the secondary technical school, while the parents of three participants could afford private apartments for them. However, living in private accommodation was even more demanding, as these participants, for example, had to prepare their own meals. In contrast, those residing in the dormitory had access to meals provided by the canteen. Nevertheless, all participants were required to navigate daily life in Czechia agentically without their parents’ physical presence. This situation fostered the development of agency, resilience, confidence, and independence. As one student explained:

3 Parents typically provided some additional money for travel between Ukraine and the Czech Republic. The specific amount varied, but averaged approximately €200 per month.

I have to look after myself, solve everything, some documents, some signatures from school, buy something, everything I should do only by myself, everything. Here [in Uničov] it is different. If I was in Ukraine ... it would be different there. Here you have to be independent even if you are not even 18 years old. You have to deal with it. (Lara)

Independence was frequently associated with entering a “mature life,” as explained by another student:

I could cook alone; I have to take look after my health alone. And I have to go and buy something alone. No one from the family will buy me medicine and no one will say to me: “You have to drink this and that [when you are sick].” I have to do everything just on my own. And I also have to think in advance, prepare a snack for school. This is a more mature life than my classmates have. (Olena)

Although none of the participants reported experiencing serious illness during their stay in Uničov, they all had access to public health insurance. Those residing in the dormitory could also rely on support from dormitory staff. Therefore, despite their claims of resilience and independence, participants generally had access to external forms of support.

Participants explored their independence and capability to act, even though reverse remittances remained present. They generally perceived these remittances positively; however, later in their studies, many decided to earn their own income through part-time jobs, thereby diminishing the role of parental financial support. One participant who worked in a part-time job stated:

I talked to my parents about [getting] a job for me to be more independent. But I could not work full time at that time because I was told that I was not 18 years of age. So, I worked on a construction site in a part-time job. Now, the situation is different [after I turned 18]. I could earn more, but [my] parents still send me their money. (Vladyslav)

Only two participants were able to obtain a full-time job. One decided to work full-time because her mother, who was working in Great Britain at the time, was unable to save sufficient funds to support her. The other sought to relieve their parents of financial strain, as household income had significantly decreased due to the reverse remittances sent to the participant.

For some participants, after obtaining a job, parental financial support was no longer considered as decisive: “I have money [from my job] only for myself, to be independent of my mother’s finances. I can earn my own money to have a sustainable life here. I pay almost for everything” (Ivan). Therefore, after the initial phase of living in Uničov, participants’ new life trajectories increasingly came to be associated

with independence from full parental financial support. However, one participant highlighted the ambivalence of this situation: although she chose to work, doing so reduced the time available for studying, which negatively affected her school performance. This was a noteworthy point that was not mentioned by other participants.

With regard to the future, participants aspire to achieve full financial independence from their parents:

I want to use the opportunity [of being] in Czechia, and I want to adapt here only by myself. This means achieving something on my own, to work, to get money, and something else. Like... I do not want to use what others and my parents give me. I want to do something myself. Use the opportunity I have. In the future, I will take over this restaurant [in Dubno from my parents]. But before that, I will achieve something on my own [abroad]. (Denis)

This is primarily related to the participants' future. However, their future aspirations are significant because they frame them in terms of independence from parental financial support. These goals are relevant, as they shape participants' expectations regarding the future relationships with their parents: "I wanted to reach something on my own. Employment, my own life, family. Because, you know, you have to prepare yourself for your own life. You have to be prepared that there could be even more difficult situations than I have now. I cannot rely on someone else in my life. Parents should have their own lives too" (Jana). Another participant explained: "I have a different life here than in my hometown. I have the feeling that parents should keep their old life and I have to move forward. They should care about themselves, and I will somehow arrange my life here" (Lara). This aligns with findings among South Asian students in Finland and Sweden (Ul-Abdin, 2025). It should be noted, however, that physical separation was associated with more positive attitudes toward parents. Although participants initially wished to escape parental rules and norms prior to migration, they later came to appreciate parental support, recognized the extent of their parents' self-sacrifice, and maintained regular visits during summer and Christmas holidays. Parents were also frequently cited as the primary driver for visits due to a feeling of home (Karlová, 2014).

Therefore, participants, who were on average 17 years old at the time of the interviews, expressed aspirations for financial independence from their parents, which is atypical for their Czech peers. Participants noted that their classmates were still being cared for by their parents, which they interpreted as a sign of being less "mature." Three participants described experiencing a different mindset compared with their classmates, whom they perceived as still "childish." One participant even described feeling alone in her class because her peers were not "mature." This means that the participants' self-perception of "being more mature" is based more on everyday experience than on chronological age (Huijsmans, 2015).

Transnational families are typically understood in terms of the interpersonal circulation of finances and material or social resources, as well as the provision of care among family members. However, according to the participants, the role of reverse remittances—often assumed to be central to transnational family life (Fitz-Gerald, 2014)—is diminished because participants express autonomous personal development and their own independent pathway. Although family may trigger migration aspirations and family socioeconomic positions influence migrants' positionality (Collins, 2018; Van Hear et al., 2018), family influences are also discussed as limitations on migration aspirations (De Haas & Fokkema, 2010; Mata-Codesal, 2018; Rodriguez-Pena, 2022; 2024; Vezzoli, 2023). In line with these findings, our results show that families' reverse remittances are a limitation for participants' development. It is important to note that these results are based on participants' self-represented aspirations and that, at the time of the research, they continued to receive reverse remittances from their parents. Participants' migration aspirations are linked to valuing the principle of relying on their own efforts to achieve instrumental goals, even though parental financial support continues—and likely will continue in the near future—to sustain the success of their migration trajectories.

CONCLUSION

To address the research questions, the findings show that participants who migrated instrumentally assert independence from their parents and their reverse remittances. This independence is related to participants' personal development during their stay in Uničov, as they perceive parental financial support as "undesirable" because they would like to care for themselves autonomously. Participants' self-representations emphasize the value of self-reliance, highlighting that reverse remittances do not align with their personal migration aspirations. These findings also contribute to an understanding of another side of the relationship between family influence and participants, emphasizing that participants report increasingly positive attitudes toward their parents over time (they are more willing to visit and talk with them).

The notion of instrumental migration aspirations refers to the deliberate pursuit of specific individual goals (Carling & Collins, 2018; De Haas, 2021). However, instrumental migration aspirations are typically studied prior to migration. The same applies to the influence of family on these aspirations (Mata-Codesal, 2018; Rodriguez-Pena, 2022; 2024; Vezzoli, 2023). In contrast, this study examines how the migration aspirations of participants who have already settled in the host country are linked to reverse remittances provided by their families. Although reverse remittances have been discussed not only in relation to financial transfers but also as a form of transnational care arrangement (Mazzucato, 2011), the findings of this study suggest that the role of reverse remittances, as a form of transnational care, may be diminished due to participants' aspirations for personal development in the host

country. Although previous research has shown that transnational support (logically) tends to diminish over time as migrants spend longer periods in the host country (Ul Abdin, 2025), this article shows that participants often perceive reverse remittances as “undesirable” because they conflict with their personal desires and autonomy.

This research has several limitations. First, it should be noted that participants were still adolescents who, given their life course, would logically seek greater independence from parental rules and norms. Second, the study focused on only one subgroup of participants—those who migrated instrumentally—while participants who were encouraged by their parents to migrate may express their situation differently. Third, less reliance on parental support does not imply complete financial independence. Family support remains active, and participants continue to benefit from it. However, participants’ perspectives are decisive, as the findings show how the influence of parental reverse remittances is shaped by participants’ instrumental migration aspirations and how these two aspects intersect and induce changes over time.

RESEARCH DATA ACCESSIBILITY STATEMENT

The research data are stored at the Department of Studies in Culture and Religion of the Faculty of Education of the University of Hradec Králové and the author’s personal archive.

REFERENCES

- Basch, L., Glick-Schiller, N., & Szanton-Blanc, C. (2003). *Nations unbound*. Routledge.
- Boccagni, P. (2017). Aspirations and the subjective future of migration: Comparing views and desires of the “time ahead” through the narratives of immigration domestic workers. *Comparative Migration Studies*, 5(4), 1–18. <https://doi.org/10.1186/s40878-016-0047-6>
- Carling, J. (2014, September 3). *The role of aspirations in migration: Paper presented at Determinants of International Migration*. International Migration Institute, University of Oxford. <https://jorgencarling.files.wordpress.com/2014/09/carling-2014-the-role-of-aspirations-in-migration-2014-07.pdf>
- Carling, J. (2025). Why do people migrate? Fresh takes on the foundational question of migration studies. *International Migration Review*, 58(4), 1757–1791. <https://doi.org/10.1177/01979183241269445>
- Carling, J., & Collins, F. (2018). Aspiration, desire and drivers of migration. *Journal of Ethnic and Migration Studies*, 44(6), 909–926. <https://doi.org/10.1080/1369183X.2017.1384134>
- Carling, J., & Hoelscher, K. (2013). The capacity and desire to remit: Comparing local and transnational influences. *Journal of Ethnic and Migration Studies*, 39(3), 939–958. <https://doi.org/10.1080/1369183X.2013.765657>
- Carling, J., & Schewel, K. (2018). Revisiting aspiration and ability in international migration. *Journal of Ethnic and Migration Studies*, 44(6), 945–963. <https://doi.org/10.1080/1369183X.2017.1384146>
- Collins, F. (2018). Desire as a theory for migration studies: Temporality, assemblage and becoming in the narratives of migration. *Journal of Ethnic and Migration Studies*, 44(6), 964–980. <https://doi.org/10.1080/1369183X.2017.1384147>
- Czech Statistical Office. (2017). *Cizinci vzdělávající se v ČR podle druhu vzdělávacího zařízení* [Foreigners studying in the Czech Republic by type of educational institution] (Report No. 3). <https://csu.gov.cz/docs/107508/ca9dcc13-321f-487a-5d98-78b59cb53b2b/29002617a02.pdf?version=1.0>
- Czech Statistical Office. (2025a). *Cizinci v České republice: Foreigners in the Czech Republic* (Publication Code 290027-25). Population Statistics Department. <https://csu.gov.cz/docs/107508/ac29195a-ff1b-5999-b6aa-ead3feb11444/29002725.pdf?version=1.1>
- Czech Statistical Office. (2025b, October 21). *Vzdělávání cizinců* [Education of foreigners]. <https://csu.gov.cz/vzdelavani-cizincu?pocet=10&start=0&podskupiny=294&razeni=-datumVydani>
- De Haas, H. (2021). A theory of migration: The aspirations-capabilities framework. *Comparative Migration Studies*, 9(8), 1–35. <https://doi.org/10.1186/s40878-020-00210-4>
- De Haas, H., & Fokkema, T. (2010). Intra-household conflicts in migration decision-making: Return and pendulum migration in Morocco. *Population and Development Review*, 36(3), 541–561. <https://doi.org/10.1111/j.1728-4457.2010.00345.x>

- Drbohlav, D. (2010). *Migrace a (i)migranti v Česku*. Karolinum.
- Drbohlav, D., & Jaroszewicz, M. (2016). *Ukrainian migration in times of crisis: forced and labour mobility*. Charles University.
- Faist, T. (2000). *The Volume and Dynamics of International Migration and Transnational Social Spaces*. Oxford University Press.
- FitzGerald, D. (2014). The sociology of international migration. In C. Brettell, & J. Hollifield (Eds.), *Migration theory: Talking across disciplines* (pp. 114–137). Routledge.
- Fog Olwig, K. (2007). *Caribbean journeys*. Duke University Press.
- Ghorashi, H., De Boer, M., & Holder, F. (2018). Unexpected agency on the threshold: Asylum seekers narrating from an asylum seeker centre. *Current Sociology*, 66(3), 373–391. <https://doi.org/10.1177/0011392117703766>
- Goździak, E. M., & Main, I. (2020). Transnational mobility and socio-cultural remittances: The case of Polish women in Norway and Poland. *Ethnologia Europaea*, 50(1), 159–175. <https://doi.org/10.16995/ee.1207>
- Huijsmans, R. (2015). Children and young people in migration: A relational approach. In C. N. Laoire, A. White, & Tracey Skelton (Eds.), *Movement, Mobilities and Journeys* (pp. 45–67). Springer.
- Ivashchenko, K. (2021). The dynamics of migration intentions among Ukraine's population: What has changed over the past 30 years? In V. Vorona, & M. Schulha (Eds.), *Ukrainian Society: Monitoring of Social Changes. 30 Years of Independence* (pp. 169–184). Institute of Sociology, National Academy of Sciences of Ukraine.
- Jirka, L. (2021). Ukrainian migration to the Czech Republic and its changes during the COVID-19 epidemic. *Lidé města/Urban People* 23(3), 331–352. <https://doi.org/10.14712/12128112.2376>
- Karlová, J. (2014). *Home, identity and worldview as part of transcultural communication*. EL Press.
- Krofl, M. (2017). Islam, transnacionalna obleka in identiteta: Migracije podob, transformacije pomenov. *Dve domovini / Two Homelands*, 46(2), 167–180. <https://doi.org/10.3986/dd.2017.2.11>
- Lacroix, T., Levitt, P., & Vari-Lavoisier, I. (2016). Social remittances and the changing transnational political landscape. *Comparative Migration Studies*, 4(16), 1–5. <https://doi.org/10.1186/s40878-016-0032-0>
- Leontiyeva, Y., & Kopecká, L. (2018). *Migrace ukrajinských studentů do České republiky: Perspektivy lidského kapitálu* (Research Paper No. 20). Asociace pro mezinárodní otázky (AMO). https://www.amo.cz/wp-content/uploads/2018/10/AMO_ukrainian-students-in-the-czech-republic_CZ1.pdf
- Levitt, P. (2001). *The transnational villagers*. University of California Press.
- Levitt, P. (2015). Social remittances: How migrating people drive migrating culture. In Triandafyllidou, A. (Eds.), *Routledge handbook of immigration and refugee studies* (pp. 223–228). Routledge.

- Mata-Codesal, D. (2018). Is it simpler to leave or to stay put? Desired immobility in a Mexican village. *Population, Space and Place*, 24(4), 1–9. <https://doi.org/10.1002/psp.2127>
- Mazzucato, V. (2011). Reverse remittances in the migration–development nexus: Two-way flows between Ghana and the Netherlands. *Population, Space and Place*, 17(5), 454–468. <https://doi.org/10.1002/psp.646>
- Morad, M., & Gombač, J. (2015). Transmigrants, transnational linkages and ways of belonging: The case of Bangladeshi migrants in Italy. *Dve domovini / Two Homelands*, 41(1), 61–76. <http://www.dlib.si/?URN=URN:NBN:SI:DOC-U84JHKEV>
- Müller-Funk, L., Üstübeci, A., & Belloni, M. (2023). Daring to aspire: theorising aspirations in contexts of displacement and highly constrained mobility. *Journal of Ethnic and Migration Studies*, 49(15), 3816–3835. <https://doi.org/10.1080/1369183X.2023.2208291>
- Nikolayenko, O. (2011). *Citizens in the making in post-Soviet states*. Routledge.
- Roberts, K. (2009). *Youth in transition*. Palgrave Macmillan.
- Rodriguez-Pena, N. (2022). Moving across (im)mobility categories: the importance of values, family and adaptation for migration. *Journal of Ethnic and Migration Studies*, 49(3), 618–635. <https://doi.org/10.1080/1369183X.2022.2064839>
- Rodriguez-Pena, N. (2024). The strength of migration and stay aspirations: understanding harmonious, conflicting and indeterminate aspirations. *Comparative Migration Studies* 12, 1–23. <https://doi.org/10.1186/s40878-024-00392-1>
- Schiefer, D., Düvell, F., & Sağıroğlu, A. Z. (2023). Migration aspirations in forced transnational families: The case of Syrians in Turkey. *Migration Studies*, 11(3), 470–503. <https://doi.org/10.1093/migration/mnad020>
- Sørensen, N. N., & Vammen, I. M. (2014). Who cares? Transnational families in debates on migration and development. *New Diversities*, 16(2), 89–108.
- Ul Abdin, Z. (2025). From remittance receivers to senders: Unpacking transnational care circulation among South Asian student migrants in Finland and Sweden. *Population, Space and Place*, 31(6), Article e70077. <https://doi.org/10.1002/psp.70077>
- Van Hear, N., Bakewell, O., & Long, K. (2018). Push-pull plus: Reconsidering the drivers of migration. *Journal of Ethnic and Migration Studies*, 44(6), 927–944. <https://doi.org/10.1080/1369183X.2017.1384135>
- Van Helsum, A. (2017). Aspirations and frustrations: Experiences of recent refugees in the Netherlands. *Ethnic and Racial Studies*, 40(13), 2137–2150. <https://doi.org/10.1080/01419870.2017.1343486>
- Van Mol, C., Snel, E., Hemmerchts, K., & Timmerman, C. (2018). Migration aspirations and migration cultures: A case study of Ukrainian migration towards the European Union. *Population, Space and Place*, 24(5), 1–11. <https://doi.org/10.1002/psp.2131>

- Velychko, K., & Yaremenko, M. (2020). The phenomenon of student migration in Ukraine. *Ekonomika*, 9(5), 62–70. <https://doi.org/10.32983/2222-4459-2020-5-62-70>
- Vezzoli, S. (2023). Understanding aspirations to stay: Relative endowment within a time-space perspective. *Migration Studies*, 11(2), 259–285. <https://doi.org/10.1093/migration/mnad007>
- Waldinger, R., & FitzGerald, D. (2004). Transnationalism in question. *American Journal of Sociology*, 109(5), 1177–1195. <https://doi.org/10.1086/381916>
- Walker, Ch., & Stephenson, S. (2010). Youth and social change in Eastern Europe and the former Soviet Union. *Journal of Youth Studies*, 13(5), 521–532. <https://doi.org/10.1080/13676261.2010.487522>
- White, A., & Grabowska, I. (2018). The impact of migration on sending countries, with particular reference to Central and Eastern Europe. In A. White, I. Grabowska, P. Kaczmarczyk, & K. Slany (Eds.), *The impact of migration on Poland* (pp. 42–67). UCL Press.

POVZETEK

NEZAŽELENA POVRATNA DENARNA NAKAZILA: PRIMER MLADIH UKRAJINSKIH ŠTUDENTOV NA ČEŠKEM

Luděk Jirka

Avtor v prispevku preučuje migracijske težnje udeležencev, ki so se v starosti 15–16 let iz praktičnih razlogov preselili iz zahodne Ukrajine (natančneje iz regij Rivne in Žitomir) na Češko. Tam so v mestecu Uničov obiskovali gimnazijo in tehniško srednjo šolo, medtem ko so njihovi starši ostali v Ukrajini ali pa so se preselili drugam (v Francijo, Veliko Britanijo ali Rusijo) ter svoje otroke čezmejno podpirali z nakazili iz tujine. Študija temelji na kvalitativni metodologiji in polstrukturiranih intervjujih z devetnajstimi sogovorniki in sogovornicami. Intervjuji so bili opravljeni med letoma 2014 in 2021, saj so se sodelujoči v tem obdobju postopoma vpisovali v šole. Praktični oz. instrumentalni motivi udeležencev za selitev so bili povezani s pridobitvijo diplome v tujini, življenjem v državi z višjim življenjskim standardom ter pripravljenostjo, da ostanejo v tujini zaradi slabših življenjskih pogojev v matični državi. Sodelujoči so cenili transnacionalno podporo staršev v obliki povratnih nakazil, ki sodijo v okvir transnacionalne družinske podpore, a so hkrati iskali tudi zaposlitev za polovični (ali celo polni) delovni čas, ker so si želeli postati finančno neodvisni od staršev. Njihova želja po neodvisnosti je povezana z njihovim osebnim razvojem med bivanjem v Uničovu, finančno podporo staršev pa dojemajo kot nezaželeno, saj so raje avtonomni in skrbijo sami zase. Cenijo samostojnost oz. samozadostnost ter poudarjajo, da so lahko vezi znotraj transnacionalnih družin – ki se kažejo v obliki povratnih denarnih nakazil – nezaželeni, saj omejujejo neodvisnost sodelujočih in niso v skladu z njihovimi instrumentalnimi migracijskimi težnjami. Te ugotovitve kažejo, kako so lahko podpora družine in povratna nakazila v določenih kontekstih dojemani kot »nezaželeni« za posameznikove migracijske težnje. Čeprav so (povratna) nakazila pogosto obravnavana kot ključni del transnacionalnega družinskega življenja, udeleženci te študije ne izpostavljajo kolektivne družinske blaginje, temveč izražajo individualne ambicije pri odločanju o svojih migracijskih poteh.

THE CROATIAN POPULATION AMONG THE OLDEST IN THE WORLD: SHIFTS IN AGE STRUCTURE, 1991–2021

Juraj Pokos,^I Rebeka Mesarić Žabčić,^{II} Nenad Pokos^{III}

COBISS: 1.02

ABSTRACT

The Croatian Population Among the Oldest in the World: Shifts in Age Structure, 1991–2021

This paper presents changes in the age composition of the Croatian population from 1991 to 2021 using several analytical indicators to quantify and establish the level of aging of the country's population. During the observed period, the share of the population aged 0–19 decreased from 26.2% to 19.2%, while the share of the population aged 60 and over increased from 17.5% to 29.9%, making the Croatian population one of the oldest in the world. Due to these demographic shifts, Croatia will soon face economic, social, and financial difficulties, as fewer people contribute to the country's pension and health-care systems.

KEYWORDS: depopulation, age structure, Croatia, population aging, migration

IZVLEČEK

Hrvaško prebivalstvo med najstarejšimi na svetu (spremembe v starostni strukturi, 1991–2021)

Avtorji v prispevku na podlagi več analitičnih kazalnikov, s pomočjo katerih so kvantificirali in opredelili stopnjo staranja hrvaškega prebivalstva, predstavijo spremembe v starostni sestavi prebivalstva na Hrvaškem med letoma 1991 in 2021. V opazovanem obdobju se je delež mladega prebivalstva (do 19 let) zmanjšal s 26,2 % na 19,2 %, delež starejših (nad 60 let) pa se je povečal s 17,5 % na 29,9 %, s čimer se prebivalci Hrvaške uvrščajo med najstarejše na svetu. Zaradi takšnih demografskih sprememb se bo Hrvaška kmalu soočila z gospodarskimi, socialnimi in finančnimi težavami, saj vse manj prebivalcev prispeva v pokojninski in zdravstveni sistem.

KLJUČNE BESEDE: depopulacija, starostna struktura, Hrvaška, staranje prebivalstva, migracije

^I Master of economics, PhD student in sociology; Catholic University of Croatia, Zagreb; jpokos@unicath.hr; ORCID <https://orcid.org/0009-0006-7716-403X>

^{II} PhD in demography; Institute of Social Sciences Ivo Pilar, Zagreb; rebeka.mesariczabacic@pilar.hr; ORCID <https://orcid.org/0000-0003-0729-6855>

^{III} PhD in demography; Institute of Social Sciences Ivo Pilar, Zagreb; nenad.pokos@pilar.hr; ORCID <https://orcid.org/0000-0001-7800-7489>

INTRODUCTION

A population's composition or structure refers to the different characteristics of the individuals comprising its total population; it suggests that individuals in a given area differ from one another according to various attributes such as sex, age, marital status, occupation, profession, educational attainment, and so forth (Nejašmić, 2005). Therefore, the concept of population composition with respect to a given characteristic denotes the distribution of the number (frequency) of individuals according to the values or modalities of a specific attribute (Wertheimer-Baletić, 1999). Since several attributes are involved, we speak of so-called partial structures, which are most commonly classified into the following three groups: a) biological (demographic), where the most important compositions are by sex and age; b) socioeconomic, which includes composition by occupation, activity, profession, education (educational attainment), and so forth; and c) cultural-anthropological, which encompasses composition by race, nationality, language, religion, and so forth (Nejašmić, 2005).

The age structure of the population is often highlighted as one of the most important demographic structures because it affects both population development and socioeconomic development. It indicates the need for preschools, primary and secondary schools, and universities, shows the volume of jobs required for new generations entering their active years, and indicates the likely scale and structure of health-care expenditures, among other things (Wertheimer-Baletić, 1999). For some authors, the age structure occupies a central place in understanding the functioning of society because it is essential for analyzing social processes and systems and for predicting future social changes.

The most important process in the development of Croatia's age structure, with far-reaching and severe consequences for overall demographic and socioeconomic development, is the accelerated process of demographic aging and the very high degree of aging of the total population (Nejašmić, 2003). Croatia is among the most severely affected countries in the world, with its residents already being among the oldest, and the situation is expected to worsen. To date, this rapid population aging—reflected in the growing share of older people and the declining share of young people—has not been halted, slowed, or substantially mitigated.

Moreover, it is not only about the aging of the total population but also about partial aging processes, which involve the aging of specific functional age contingents, such as the working-age population, the reproductive-age population, the economically active population (labor force), and so on (Wertheimer-Baletić, 2002).

METHODOLOGICAL NOTES

Since the main data sources are population censuses, a descriptive and comparative analysis was conducted. The analyzed data show that population aging has become a dominant demographic, social, and economic issue in Croatia. Demographic aging, per se, is not inherently a problem (Čipin et al., 2014). Čipin et al. (2014), however, describe the increase in longevity underlying demographic aging as one of humanity's greatest achievements in the last century, manifested in a significant increase in life expectancy at birth following a long period of relatively low and slowly growing life expectancy. What could pose a problem are the economic and social costs associated with demographic aging. If public policies fail to adapt to the new demographic regime (an increasing share of the population aged 60 and over), demographic aging could indeed become one of the greatest socio-financial challenges for political authorities.

The main goal of this study is to present changes in the age structure of the population across four successive censuses, namely, from 1991 to 2021. Two hypotheses were formulated and tested in the study:

H1 – From one census to the next, the share of the younger population in Croatia is decreasing, while the share of the older population is increasing; therefore, according to all aging indicators, Croatia's population records an increasing degree of aging with each subsequent census.

H2 – According to all indicators, the female population is, on average, older than the male population.

The hypotheses are based on a constant decline in birth rates, intensive emigration, and an increase in life expectancy, which is higher for women than for men.

The paper presents the following: first, indicators of population aging; second, indicators of age structure; and finally, the potential consequences of population aging.

THE IMPACT OF DEMOGRAPHIC COMPONENTS ON CHANGES IN AGE STRUCTURE

Age structure is influenced by birth and mortality rates and by migration. These factors can be indirectly influenced by external factors such as wars, natural disasters, epidemics of infectious diseases, and so on.

The relationship between birth and mortality rates, on the one hand, and age structure, on the other, is causal. Components of natural population change shape age structure over the long term, which in turn determines the levels of general and specific birth and mortality rates in the following long-term period. Of these two

components of natural change, birth rates have a significantly stronger impact on age structure. They are the most dynamic determinant of age-structure changes under normal population development. Therefore, a high birth rate typically results in a young age structure and, consequently, large cohorts that later enter the working-age population. In contrast, a low birth rate leads to a relatively high proportion of the population in middle and old age. Although the number of births and deaths together determine the number of people in different age groups, the impact of mortality is much weaker because it affects all age groups.

Migration often modifies the age structure shaped by birth and mortality rates (Wertheimer-Baletić, 1999) as migrants are mainly between the ages of 20 and 40. In countries of origin, emigration reduces these cohorts, leading to gaps in the age structure. In destination countries, immigration enlarges these cohorts beyond the size formed by birth and mortality rates. These changes in the age structure have an immediate effect because, in the country of origin, the population of reproductive age decreases, the number of births decreases, and the mortality rate may increase as younger populations, less exposed to the risk of death, emigrate. Destination countries experience the reverse: an influx of working-age adults, resulting not only in demographic but also economic gains.

Migration also has a long-term (delayed) impact on demographic and economic development in countries of origin because emigrated populations take their reproductive potential with them, which is reflected in approximately two decades of reduced influx of new generations into the working-age category, thereby increasing the proportion of older residents. In destination countries, the consequences are again reversed: immigration of populations aged 20–40 leads to more births and, therefore, to a short-term increase in the proportion of the population in the youngest age groups.

In addition to affecting population reductions, external events also alter birth rate trends. Wars impact the age structure through military and civilian deaths, sharp declines in births, and internal and external migrations. Population losses due to war, emigration (including refugees), and declines in birth rates (due to psychological factors and the absence of male family members due to military duty) have lasting consequences for population size and its age structure. In contrast, internal migrations (displaced persons) at the state level may have only temporary consequences.

DATA SOURCE

The main source of data on population age is the census, and this characteristic is most commonly defined by the number of completed years of life, that is, age on the last birthday before the census. In Croatian censuses from 1921 to 2021, age was generally recorded in completed years; the 1948 census was the exception, grouping the population by calendar years of age.

In the population censuses, the total population is presented in one-year or five-year age groups, from which it is later possible to be regrouped into broader or narrower age groups depending on the needs of a specific study. For the study of the reproductive potential of the female population, three broad age groups are distinguished: prereproductive age (0–14), reproductive age (15–49), and postreproductive age (50 and over). For assessing labor resources, the total population is divided into three broad age groups: the pre-working-age population (0–14), the working-age population (15–64 for men and 15–59 for women), and the post-working-age population (65 and over for men and 60 and over for women). The population can also be grouped by age to assess and plan other resources, predict the number of schoolchildren, students, and so on.

EXISTING KNOWLEDGE ON CHANGES IN THE AGE STRUCTURE OF THE POPULATION OF CROATIA

A review of the literature found that very few authors focus primarily on this topic. There are significantly more works in which changes in the age structure and aging processes are mentioned mainly as part of the analysis of general demographic changes. Changes in the age structure of Croatia's population have been addressed sporadically by Gelo (1987), Friganović (1990), Nejašmić (1991), Wertheimer-Baletić (1999; 2001; 2004; 2007), Živić (2003b), and Živić et al. (2005). Živić et al. (2005) state that, despite differences among classifications of population age structure, Croatia was already on the threshold of aging in the early 1960s and had entered the category of demographic old age by 1971. By 2001, Croatia had reached the category they term "deep ageing" (Živić, 2003a; Živić et al., 2005). Josipović (2024) uses deep aging as a tentative term for a situation in which aging driven by below-replacement fertility is intensified by substantial emigration among people of reproductive and working age. He identifies Croatia and Serbia as the countries in the former Yugoslav region in which this process is most pronounced.

Demographic aging has also been studied using examples from rural settlements (Nejašmić & Toskić, 2016) and Croatian islands (Nejašmić, 1992), while several studies focus on population aging at the regional and county levels. Gelo (1999) approached the issue of demographic aging by analyzing wartime events between 1991 and 1995. Some studies address the implications of demographic aging (Stipetić, 1994; Banovac et al., 2001; Podgorelec & Klempić, 2007; Obadić & Smolić, 2008; Puljiz, 2016; Čipin, 2022). Nejašmić (2003) and Živić (2003a) have engaged in a more comprehensive analysis of the aging of the entire population of Croatia over the past twenty years, analyzing basic trends in the population's age structure development in the periods 1981–2001 (Nejašmić) and 1961–2001 (Živić). Gelo et al. (2005) provide an overview of age-sex structure trends in Croatia throughout the twentieth century, while Nejašmić and Toskić (2013) discuss the causes and features

of demographic aging, including the spatial aspect of the process and comparisons with European countries. In addition to the demographic aspect of population aging, Peračković and Pokos (2015) provide an overview of the most important theories of aging, while Živić et al. (2017) analyze changes in the age structure of the population between 1953 and 2011. The latter authors emphasize that demographic aging is becoming not just one of many but the most significant factor in the total and natural depopulation that Croatia has experienced for more than two decades. It is also an important destabilizing factor for economic development and social stability, as reflected in the increasing challenges regarding pensions, social, and health care for older people (Pokos & Peračković, 2016).

It is also worth mentioning the study *Stručna podloga za izradu Strategije prostornog razvoja Republike Hrvatske: demografski scenarij i migracije* [Demographic scenarios and migration: Expert basis for the development of the Spatial Development Strategy of the Republic of Croatia] (Čipin et al., 2014), which presents comparisons with other EU member states and indicators of demographic aging at the county and municipal levels.

INDICATORS OF AGING OF THE CROATIAN POPULATION

Due to the sustained, full-intensity emigration from Croatia, which has persisted for almost a century and a half, and the deterioration of Croatia's natural population dynamics, especially the birth rate, certain specific factors that have disrupted biodynamic processes in the country must also be considered alongside population aging. These include an industrialization and agrarian policy model that encouraged rural-to-urban migration and contributed to rapid urban overcrowding. Furthermore, there has been a decades-long lack of any meaningful and stimulating pronatalist population policy in the country. An effective pronatalist policy should certainly be coupled with changes in the attitudes of both society and individuals toward the family, which are reflected in family planning, nuptiality (marriage rates), divorce rates, female employment, and similar factors (Wertheimer-Baletić, 1995).

We will begin the analysis of the age structure with the year 1991 and the number of inhabitants in five-year age groups in absolute and relative terms for the total population and separately for males and females (Table 1). At that time, the most numerous group, both overall and among males and females, was the 35–39 age group. The predominance of this age group reflects the increased number of births during the “baby boom” period in Croatia, which lasted from 1946 to 1954. Although the 40–44 age group might be expected to have been similar in size, it was 7.9% smaller than the immediately younger 35–39 age group, primarily because a relatively larger share of this cohort had emigrated in the early 1970s. Therefore, the second most numerous group consisted of inhabitants in the 30–34 age group, even though the number of births during their birth years was lower than that in

the 40–44 age group. The 45–49 age group had 24.8% fewer inhabitants than the preceding 40–44 group and 14.6% fewer than the immediately older 50–54 age group, reflecting the reduced number of births during World War II. Due to the continuous decline in births during the 1980s, the youngest 0–4 age group had 11% fewer inhabitants than the 5–9 age group. The 0–4 age group accounted for only 5.9% of the total population, compared with 10.2% in 1953 and 8.7% in 1961. Such a significant decline in live births at the transition from the 1980s to the 1990s was expected to result in even fewer live births after 25 to 30 years, when most members of these cohorts reached parenthood.

Age group	Total*	Men	%	Women	%
0–4	280,056	143,588	3.0	136,468	2.9
5–9	314,697	161,383	3.4	153,314	3.2
10–14	331,426	169,518	3.5	161,908	3.4
15–19	326,290	166,909	3.5	159,381	3.3
20–24	320,222	162,613	3.4	157,609	3.3
25–29	342,388	172,740	3.6	169,648	3.5
30–34	365,956	185,298	3.9	180,658	3.8
35–39	375,091	192,203	4.0	182,888	3.8
40–44	345,466	176,628	3.7	168,838	3.5
45–49	259,849	129,464	2.7	130,385	2.7
50–54	304,427	150,063	3.1	154,364	3.2
55–59	311,402	149,183	3.1	162,219	3.4
60–64	278,948	126,447	2.6	152,501	3.2
65–69	219,466	83,278	1.7	136,188	2.9
70–74	119,676	43,574	0.9	76,102	1.6
75–79	109,642	38,517	0.8	71,125	1.5
80–84	73,229	24,218	0.5	49,011	1.0
85–89	26,810	7,786	0.2	19,024	0.4
90–94	6,193	1,633	0.0	4,560	0.1
95 and older	1,024	233	0.0	791	0.0

* The difference from the total population refers to inhabitants of unknown age.

Table 1: Age structure of the Croatian population in 1991 by five-year age groups (source: Population Census 1991, Population by Sex and Age. Documentation 882, DZS, Zagreb, 1994).

In the 2001 census, the most numerous age groups are the same as in 1991, but now they are aged 45–49, just slightly outnumbering the 40–44 age group, where there were more women than men, unlike ten years earlier in the 30–34 age group. Identical changes were noted in the 35–39 age group, which can be explained by the fact that these cohorts suffered greater losses among the male population than among the female population during the Homeland War. The two age groups comprising people in their sixties were together 5.9% larger than the two youngest five-year age groups (0–4 and 5–9) (Table 2).

Age group	Total*	Men	%	Women	%
0–4	237,522	121,718	2.7	115,804	2.6
5–9	248,528	127,274	2.9	121,254	2.7
10–14	268,584	137,175	3.1	131,409	3.0
15–19	298,606	152,676	3.4	145,930	3.3
20–24	305,631	155,739	3.5	149,892	3.4
25–29	294,497	148,666	3.4	145,831	3.3
30–34	295,431	147,920	3.3	147,511	3.3
35–39	317,273	158,506	3.6	158,767	3.6
40–44	333,403	166,499	3.8	166,904	3.8
45–49	333,576	168,290	3.8	165,286	3.7
50–54	299,773	148,224	3.4	151,549	3.4
55–59	229,775	108,673	2.4	121,102	2.7
60–64	262,016	120,667	2.7	141,349	3.2
65–69	252,947	110,459	2.5	142,488	3.2
70–74	203,885	81,884	1.8	122,001	2.7
75–79	137,201	44,149	1.0	93,052	2.1
80–84	56,954	17,040	0.4	39,914	0.9
85–89	30,833	8,682	0.2	22,151	0.5
90–94	10,265	2,571	0.1	7,694	0.2
95 and older	1,455	323	0.0	1,132	0.0

*The difference from the total population refers to inhabitants of unknown age.

Table 2: Age structure of the Croatian population in 2001 by five-year age groups (source: Population Census 2001, Population by Sex and Age, by Settlements; Statistical Report 1167, DZS, Zagreb, 2003).

Due to increasing mortality rates, the group aged 55–59 in the 2011 census was no longer the largest, replaced instead by the group aged 50–54 (Table 3). Regarding the youngest age groups, it is notable that children aged 5–9 were fewer than those

aged 0–4 by 3.9%, and even fewer than those aged 10–14 by 13.2%. Such an imbalance is a direct consequence of the sharp decline in births in the early years of this century. There is also a significant increase in the oldest population, with 168.7 thousand individuals aged 80 years and over, compared to just 99.5 thousand individuals ten years earlier, representing a relative increase of 70%.

Age Group	Total	Men	%	Women	%
0–4	212,709	109,251	2.5	103,458	2.4
5–9	204,317	104,841	2.4	99,476	2.3
10–14	235,402	120,633	2.8	114,769	2.7
15–19	244,177	124,918	2.9	119,259	2.8
20–24	261,658	133,455	3.1	128,203	3.0
25–29	289,066	147,416	3.4	141,650	3.3
30–34	294,619	149,998	3.4	144,621	3.4
35–39	284,754	143,984	3.2	140,770	3.3
40–44	286,933	143,603	3.4	143,330	3.3
45–49	307,561	152,446	3.6	155,115	3.6
50–54	320,502	157,981	3.7	162,521	3.8
55–59	311,818	153,750	3.6	158,068	3.7
60–64	272,740	127,851	3.0	144,889	3.4
65–69	202,002	89,364	2.1	112,638	2.6
70–74	212,401	88,912	2.1	123,489	2.9
75–79	175,526	66,456	1.6	109,070	2.5
80–84	108,104	35,999	0.8	72,105	1.7
85–89	47,641	12,415	0.3	35,226	0.8
90–94	10,758	2,580	0.1	8,178	0.2
95 and older	2,201	482	0.0	1,719	0.0

Table 3: Age structure of the Croatian population in 2011 by five-year age groups (source: Population Census 2011, Population by age and sex by settlements; https://web.dzs.hr/Hrv/censuses/census2011/results/htm/H01_01_01/H01_01_01.html).

Due to the epidemiological situation, the 2021 population census was conducted several months later than planned, and the data reflect the situation as of August 31 of that year. In contrast, in previous censuses, the data reflected the situation as of March 31. Therefore, the five-year age groups in 2021 do not completely cover identical cohorts as in the three previous censuses. However, disregarding this mismatch, it is evident that in the latest census, the largest group is the one aged 60–64, that is, individuals born between September 1957 and August 1961. After them, in terms of

numbers, the next two adjacent five-year age groups are nearly equal in population; those aged 55–59 and those aged 65–69, which largely include individuals born in the baby-boom period. Following Croatia's accession to the European Union in 2013, substantial emigration among the working-age population contributed to marked cohort losses. The cohort aged 15–19 in 2011 was 12.3% smaller when it reached ages 25–29 in 2021. Similarly, the cohort aged 20–24 in 2011 was 13.0% smaller at ages 30–34 in 2021, while the cohort aged 25–29 in 2011 was 11.6% smaller at ages 35–39 in 2021. In 2021, people aged 80 and over accounted for 5.5% of the total population, up from 2.2% in 1991. Table 4 and Figure 1 show Croatia's age-sex structure in 2021.

Age group	Total	Men	%	Women	%
0–4	175,535	90,245	2.3	85,290	2.2
5–9	181,445	93,311	2.4	88,134	2.3
10–14	195,436	100,216	2.6	95,220	2.5
15–19	188,729	97,228	2.5	91,501	2.4
20–24	208,852	107,102	2.8	101,750	2.6
25–29	214,023	109,139	2.8	104,884	2.7
30–34	227,551	114,778	3.0	112,773	2.9
35–39	255,617	128,398	3.3	127,219	3.3
40–44	267,349	134,213	3.5	133,136	3.4
45–49	260,146	130,035	3.4	130,111	3.4
50–54	260,056	127,953	3.3	132,103	3.4
55–59	279,504	134,655	3.5	144,849	3.7
60–64	288,351	136,338	3.5	152,013	3.9
65–69	279,106	129,728	3.4	149,378	3.9
70–74	228,612	100,506	2.6	128,106	3.3
75–79	146,855	59,065	1.5	87,790	2.3
80–84	122,719	44,672	1.2	78,047	2.0
85–89	67,249	21,206	0.5	46,043	1.2
90–94	21,019	5,604	0.1	15,415	0.4
95 and older	3,679	737	0.0	2,942	0.1

Table 4: Age structure of the population of Croatia in 2021 by five-year age groups (source: Population Census 2021, Population by age and sex by settlements; <https://podaci.dzs.hr/hr/podaci/stanovnistvo/popis-stanovnistva>).

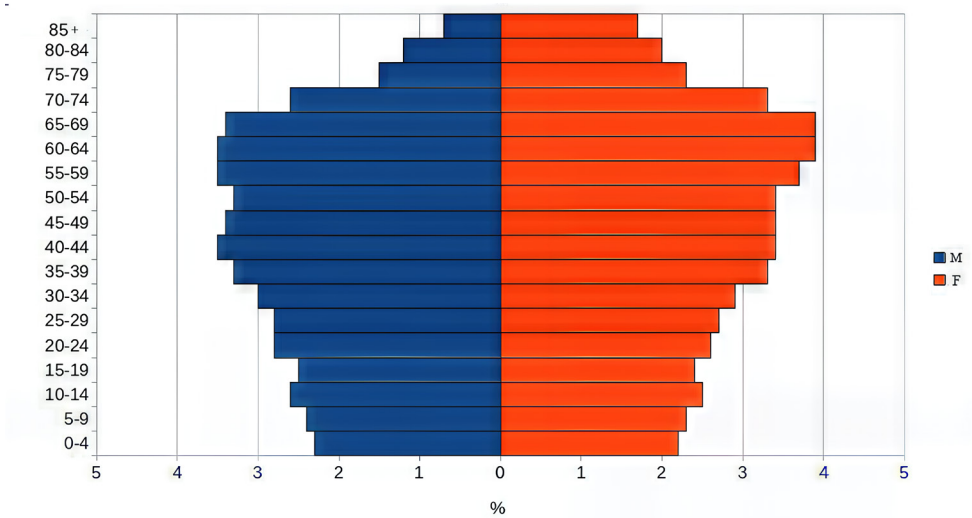


Figure 1: Croatia’s population by age group and sex, 2021. Note: The oldest category combines people aged 85 and over. Source: Authors’ calculations based on Croatian Bureau of Statistics 2021 census data.

The introduction indicates that one of the most important factors in population aging is the dynamics of the number of births and deaths. Table 5 presents data on the number of births and deaths between 1990 and 2021, showing how the decline in the number of births, which has been almost continuous in Croatia since the mid-twentieth century, along with other factors such as emigration and generational depopulation, is the primary determinant of demographic aging in Croatia (Živić, 2003b). The sustained decline in births indicates Croatia is experiencing “aging from below.” Since 1991 saw an increase in the number of deaths due to wartime events, and data on births and deaths were not available from the occupied parts of Croatia for several months at the end of the same year, the prewar year of 1990 is used as the starting point. Between 1990 and 2021, the number of births decreased by almost a third, or 32.2%, while the number of deaths increased by 21.2%. However, considering that in 2021, as well as in 2020, there was an increase in the number of deaths compared to previous years, primarily due to the COVID-19 pandemic, it is more relevant to compare the number of deaths to that of 2019, which shows that the number of deaths in 2019 had not significantly changed compared to 1990.¹

1 The highest number of deaths due to COVID-19 in Croatia was recorded in November and December 2020, as well as in March, November, and December 2021 (Graovac Matassi & Josipović, 2023).

Year	Births	Deaths	Natural Change
1990	53,869	51,752	2,117
1991	50,815	55,714	-4,899
1992	44,679	52,315	-7,636
1993	46,106	51,118	-5,012
1994	45,426	49,440	-4,014
1995	45,671	50,294	-4,623
1996	48,218	49,657	-1,439
1997	48,604	50,801	-2,197
1998	47,068	52,311	-5,243
1999	45,179	51,953	-6,774
2000	43,746	50,246	-6,500
2001	40,993	49,552	-8,559
2002	40,094	50,569	-10,475
2003	39,668	52,575	-12,907
2004	40,307	49,756	-9,449
2005	42,492	51,790	-9,298
2006	41,446	50,378	-8,932
2007	41,910	52,367	-10,457
2008	43,753	52,151	-8,398
2009	44,577	52,414	-7,837
2010	43,361	52,096	-8,735
2011	41,197	51,019	-9,822
2012	41,771	51,710	-9,939
2013	39,939	50,386	-10,447
2014	39,566	50,839	-11,273
2015	37,503	54,205	-16,702
2016	37,537	51,542	-14,005
2017	36,556	53,477	-16,921
2018	36,945	52,706	-15,761
2019	36,135	51,794	-15,659
2020	35,845	57,023	-21,178
2021	36,508	62,712	-26,204

Table 5: Number of births and deaths in Croatia 1990–2021 (source: Bulletins “Natural Movement of the Population of the Republic of Croatia”, Croatian Bureau of Statistics 1991–2022).

INDICATORS OF THE AGE STRUCTURE OF THE CROATIAN POPULATION

To determine the level of population aging and the dynamics of demographic processes in the age structure, several sets of indicators are available. The first group comprises two measures of central tendency: mean age and median age. Mean age—termed “average age” in the Croatian Bureau of Statistics tables—is the arithmetic mean of the ages of all members of the population at the census date. This value is influenced by the representation of both the highest and lowest age groups, and the aging process is considered to begin when the mean age reaches 30 years. Accordingly, the population of Croatia was already in the aging process in 1953, when the mean age was 30.7 years. Data for the census years 1991–2021 show an increase in the mean age from one census to another, driven by the decreasing share of the young population and the increasing share of the working-age contingent and the older population. Between 1991 and 2021, the mean age increased by as much as 7.2 years, or in that period, the mean age of the Croatian population increased annually by 0.24 years (Table 6). Due to the higher number of males in younger age groups, which is conditioned by a greater number of male births than female births, as well as the longer life expectancy of females, men have had a lower mean age than women every year, with this difference ranging from 3.3 to 3.5 years.

Year	Total	Men	Women
1991	37.1	35.4	38.7
2001	39.3	37.5	41.0
2011	41.7	39.9	43.4
2021	44.3	42.6	46.0

Table 6: Mean Age of Croatia’s Population 1991–2021. Source: Croatian Bureau of Statistics (2023), Average Age of Population, 1953–2021 Censuses.

The median age represents the age at which the total population is divided into two equal parts. As this year is determined by its position in the numerical sequence, the median is the positional middle value. It is a better indicator of the average age than the mean age because extreme values of the population distribution by age do not affect the median. The presented time series from 1991 to 2021 shows an increase in the median age from one census to the next, confirming the process of intense aging of the Croatian population.

While in 1991, Croatia’s median age was 36.5 years, by 2021, it had risen to 45.4 years (Table 7). Within European contexts, data for 2022 show that only Italy (48.0), Portugal (46.8), Greece (46.1), and Germany (45.8) had a higher median age than

Croatia.² Among non-European countries, Japan has an older population; according to UN data for 2022, the median age there was 48.5 years (United Nations, Department of Economic and Social Affairs, Population Division, 2024). This indicates that, in terms of median age, Croatia ranks sixth among countries with the oldest population in the world. In 2022, Central African Republic had the lowest median age, at 14.3 years, followed by the Niger (15.1), Chad (15.1), Mali (15.3), and Somalia (15.4).

Year	Total	Men	Women
1991	36.5	34.9	38.3
2001	39.3	37.3	40.9
2011	42.0	40.0	44.1
2021	45.4	43.4	47.4

Table 7: Median Age of Croatia's Population 1991–2021 (source: authors' calculations based on data from Tables 1, 2, 3, and 4).

Indicators of changes in age structure that focus on the older population are more precise indicators than the mean values. If they show the proportion of the older population in the total population, it is referred to as the old-age coefficient, and for the older population, individuals aged 60 and over or aged 65 and over can be considered. The old-age coefficient is a basic indicator of the level of aging, as it measures the increase in the share of the older population in the total population. It is generally considered that a country or region's population has begun to age when the proportion of the population aged 60 and over reaches 12% (Nejašmić, 2008), or the population aged 65 and over reaches 10% of the total population (Siegel & Swanson, 2004). Comparing the number and proportion of the older population across population censuses from 1991 to 2021 shows a significant increase in both absolute and relative numbers from census to census (Table 8). Over the entire period studied, the total population decreased by 19.1%, while the number of individuals aged 60 and over increased by 38.6% and the number of individuals aged 65 and over increased by 56.3%. The larger percentage increase partly reflects a cohort deficit at the lower end of this age group in 1991, especially among men. Born in the early to mid-1920s, these male cohorts experienced heavy losses in World War II.

By the proportion of those aged 60 and over, Croatia's population could already be considered old as early as 1971, when the old-age coefficient was 14.9, while the coefficient for those aged 65 and over first exceeded the 10% threshold in 1981, when their share of the total population was 11.4%.

Comparing Croatian data with age-coefficient data from other countries, it can be observed that in 2022, only Italy (23.8%), Portugal (23.7%), Finland (23.1%), and

² Monaco and San Marino also have a higher median age but as they have a relatively small number of inhabitants their data are often not compared with other countries (Eurostat, n.d.).

Greece (22.7%) had a higher proportion of individuals aged 65 and over.³ Of course, Japan remains ahead of them, with a significantly higher age coefficient of 28.9 in 2021.⁴ If we consider the population aged 60 and over, Croatia's situation is even more unfavorable, as only Italy (30.7%) and Portugal (30.5%) have a higher age coefficient than Croatia, second to Japan (34.7%).⁵

Year	Number of the Older Population (Aged 60 and over)	Old-age Coefficient: Population aged 60 and over (%)	Number of the Older Population (Aged 65 and over)	Old-age Coefficient: Population aged 65 and over (%)
1991	834,988	17.5	556,040	11.6
2001	955,556	21.5	693,540	15.6
2011	1,031,373	24.1	758,633	17.7
2021	1,157,590	29.9	869,239	22.5

Table 8: Older-Population Counts and Old-Age Coefficients in Croatia, 1991–2021 (source: authors' calculations based on data from Tables 1, 2, 3, and 4).

Considering the age composition by sex, in 1991, there were 325,866 men and 509,122 women aged 60 and over, while in 2021, there were 497,856 men and 659,734 women in that age group. Thus, during the observed period, the absolute number of men aged 60 and over increased by 52.8% and the number of women aged 60 and over by 29.6%, primarily due to the aforementioned deficit cohort of men born in the 1920s. Therefore, in 1991, there were 56.2% more women aged 60 and over, while in 2021, the surplus in favor of women was only 32.5%. Even greater differences are observed in the population aged 65 and over, as the number of men increased from 199,239 in 1991 to 361,518 in 2021, an increase of 81.4%. During the same period, the number of women increased from 356,801 to 507,721, a 42.3% increase. In this age group as well, there were significantly more women than men in 1991 compared to 2021. In the latter year, there were 40.4% more women, while in 1991 the surplus of women over men reached 79.1%.

Due to higher specific mortality rates among males, resulting in a shorter average lifespan, the age coefficients for females are significantly higher than those for males (Table 9). Thus, in 2021, men aged 60 and over accounted for slightly more than a quarter of the total male population, while women aged 60 and over accounted for almost a third of the total female population. Among individuals aged 65 and over,

3 https://ec.europa.eu/eurostat/databrowser/view/demo_pjanind__custom_8570150/default/table?lang=en

4 <https://www.stat.go.jp/english/data/nenkan/72nenkan/1431-02.html>

5 <https://www.stat.go.jp/english/data/nenkan/72nenkan/1431-02.htm>; https://ec.europa.eu/eurostat/databrowser/view/demo_pjanind__custom_8570212/default/table?lang=en

in 2021, the proportion among men was slightly less than a fifth, whereas among women it was slightly higher than a quarter.

Year	Age Coefficient of the Male Population (Aged 60 and over)	Age Coefficient of the Female Population (Aged 60 and over)	Age Coefficient of the Male Population (Aged 65 and over)	Age Coefficient of the Female Population (Aged 65 and over)
1991	14.0	20.7	8.6	14.5
2001	18.1	24.8	12.4	18.6
2011	20.5	27.4	14.3	20.8
2021	26.7	32.9	19.4	25.2

Table 9: Age Coefficients of the Male and Female Population in Croatia 1991–2021 (source: authors' calculations based on the data from Tables 1, 2, 3, and 4).

Another analytical indicator that uses the older population in the numerator is the aging index, which compares the number of people aged 60 and over to those aged 0–19, or the number of people aged 65 and over to those aged 0–14.

For the aging index that considers the population aged 60 and over and those aged 0–19, the critical value is 40. If it exceeds this value, it indicates that the observed population has already entered the aging process. Accordingly, Croatia's population became old as early as 1971, as the aging index was then 47.2. By 2001, the number of young people aged 0–19 had almost equalized with the number of people aged 60 and over, with only a 10.2% difference in favor of the young. However, in 2011, there were already 115 people aged 60 and over for every 100 young people. Over the next decade, the aging index increased rapidly, with the number of older people exceeding the number of younger people by as much as 56.2%.

Over the years observed, women have had significantly higher aging indexes. Therefore, among men, older people outnumbered the young only in 2021, while among women, this happened as early as 2001.

Year	Aging index of the total population	Aging index of the male population	Aging index of the female population
1991	66.7	50.8	83.3
2001	90.7	71.6	110.8
2011	115.0	92.3	139.0
2021	156.2	130.7	183.2

Table 10: Aging index (60+/0–19 years) of the total population of Croatia and by sex 1991–2021 (source: author's calculation based on data from Tables 1, 2, 3, and 4).

When analyzing the aging index, which shows the ratio of people aged 65 and over to those aged 0–19, a critical value of 30 is used. This means that when there are 30 elderly people for every 100 young people, the population is considered to have already entered the aging process. According to this indicator, Croatia's population already exceeded this value significantly in 1971, when the aging index was 42.6. By 1991, the aging index had increased to twice the critical value, and by 2001, the number of elderly and children was almost equal. Similar to the previously shown aging index (60+/0–19), in 2011, there was the first recorded instance of more elderly people than young people, with 116.3 individuals aged 65 and over for every 100 individuals aged 0–14.

When considering sex, there are also no significant differences between the two calculated aging indexes in two ways, that is, for both male and female populations in Table 11 (65+/0–14 years), except for 2021, where it is higher for the female population in Table 10 (60+/0–19 years). This is a result of entering the age category of 65 and over, with more women born in the first half of the 1950s, during the baby boom period or the post-war compensatory period. Thus, in 2021, the number of women aged 65–69 was 32.6% higher than in 2011, while in the 60–64 age group, this difference was only 4.9%. Although it was expected to be similar for men, this did not happen due to differential mortality, that is, higher casualties in the Homeland War for men born in the second half of the 1950s compared to those born in the first half of the same decade.

Year	Aging index of the total population	Aging index of the male population	Aging index of the female population
1991	60.0	42.0	80.0
2001	91.9	68.7	116.3
2011	116.3	88.5	136.1
2021	157.4	127.4	189.0

Table 11: Aging Index (65+/0–14 years) of Croatia's total population and by sex 1991–2021 (source: calculated by the author based on data from Tables 1, 2, 3, and 4).

CONSEQUENCES OF POPULATION AGING

Population aging, simply put, is reflected in the reduction in the number and proportion (youth coefficient) of young people (up to 19 years of age) and the increase in the number and proportion (age coefficient) of the elderly (above 60 years of age) in the total population.

The decline in the number and proportion of the young population, especially the proportion of the female population in the pre-fertile age, results in a decreasing influx of population into the fertile (reproductive) age, which directly implies lower

vitality, that is, new unfavorable trends in demo-reproduction, particularly concerning the dynamics of natality. This latter process in demographic theory is also known as the cohort shift effect (Wertheimer-Baletić, 1999). The proportion of the female population in the pre-fertile age (up to 14 years of age) decreased between 1991 and 2021 from 18.3% to 13.4%, and the total number of women in this segment of the Croatian female population decreased by as much as 40.5%, while the overall population decrease in the same period was 19.1%. Furthermore, the proportion of women in the fertile age group (15 to 49 years) also decreased from 46.6% to 35.4%. However, during the same period, the proportion of women in the post-fertility age group (50 years and above) increased from 33.5% to as much as 46.7% of the total female population.

The decreasing number and proportion of the young population reduce the potential volume of the working-age population, negatively affecting overall population activity and the level of socioeconomic development in the country. Changes in the age structure of the working-age population are a significant determinant of labor force dynamics and employment, as the aging workforce implies a partial aging process of the labor force, which has profound and far-reaching demographic and especially socioeconomic consequences. This has already led to a labor shortage, necessitating the development and implementation of appropriate (selective) economic immigration policies. From a series of indicators from previous studies, it is evident that the existing demographic trends in Croatia do not ensure sustainable labor force development, directly jeopardizing not only economic activity but also the pension system. In this context, it is highly unfavorable that, for instance, in 2021, pension insurance contribution revenues accounted for only 55.7% of the total revenues and receipts of the Croatian Pension Insurance Institute, while expenditures for pensions and pension benefits accounted for 96.1% of total expenditures and outlays (Balija, 2023). The increase in the number and share of the older population may contribute to a slight rise in the crude mortality rate, as age groups with higher mortality risk become more numerous. It also leads to marked increases in the financial and other resources required for the older population's pensions, health care, and social care. These additional expenditures—undoubtedly—place further burdens on the country's already disrupted and struggling economy.

CONCLUSION

Population aging is a global demographic trend that has been evident in Croatia for many years. The population of Europe is also aging rapidly due to overall aging and declining birth rates. It is estimated that the EU population will peak around 2026 and gradually decrease in the coming decades. It is projected that by 2070, the share of the population aged 65 and over will reach 30% of the total population. If such trends continue, labor shortages could worsen, and pressure on public budgets

could increase, significantly impacting investment and productivity. Consequently, in 2021, the European Commission published its *Green Paper on Ageing*, which launched an extensive strategic debate on aging, the options for anticipating and responding to its challenges and opportunities, and how to maintain the quality of life of the older population for as long as possible (European Commission, 2021). The toolbox for managing demographic change is based on four key pillars: supporting families and parents; supporting and empowering youth; empowering older generations; and, where necessary, addressing labor shortages through managed legal migration (European Commission, 2023).

Croatia's population began aging during the 1970s, initially in rural areas that lagged behind in economic development, largely due to the emigration of the reproductive-age population. During the 1980s and 1990s, population aging advanced substantially. In the 2021 census, the mean age in Croatia was 44.3 years (Table 6), placing it among the oldest populations in Europe. Croatia's advanced population aging is also reflected in the aging index, which for Croatia as a whole was 156.2, meaning that for every 100 young people aged 0–19, there were 156.2 people aged 60 and over. Besides the fact that in Croatia in 2021 there were significantly more older adults than young inhabitants, a significant indicator for understanding the state and process of population composition by age is the comparison between the child base (aged 0–4) and individuals aged 75 and over. In 2001, these age groups were almost equal in numbers, but by 2021, there were twice as many people aged 75 and over as there were children in the youngest five-year age group.

Due to the deepening natural population decline, emigration, and extended life expectancy, year after year the proportion of the young and working-age population decreases, while the aging process intensifies. Because of these demographic changes, Croatia will soon face economic, social, and financial difficulties, as fewer people contribute to the pension and health-care systems. The resulting fiscal pressure could jeopardize the functioning of the economic system, resulting in cuts to publicly funded health care, education, pensions, and other social benefits, among other things (Pokos, 2021).

ACKNOWLEDGMENTS AND ADDITIONAL INFORMATION

The scientific article was created as part of the project Dynamics and Challenges of Migration, Remigration and Immigration in the Republic of Croatia (Dinam-rRH), funded by the European Union under the NextGenerationEU program (01/08-73/23-2519-18).

RESEARCH DATA ACCESSIBILITY STATEMENT

The authors state that the research data used in the article are maintained by the Croatian Bureau of Statistics and are publicly available at <https://dzs.gov.hr>.

REFERENCES

- Balijs, M. (2023). Suvremeni demografski procesi kao uvjetnica (ne)održivosti mirovinskoga sustava Republike Hrvatske [Contemporary demographic processes as a condition of (un)sustainability of the pension system of the Republic of Croatia]. *Kroatologija: časopis za hrvatsku kulturu Fakulteta hrvatskih studija Sveučilišta u Zagrebu*, 14(1), 105–123.
- Banovac, B., Boneta, Ž., & Vujić, V. (2001). Društvene promjene i starenje [Social changes and aging]. *Zbornik Pravnog fakulteta Sveučilišta u Rijeci*, 22(2), 537–562.
- Croatian Bureau of Statistics. (2023). *Average age of population, 1953–2021 censuses* [Data set]. https://podaci.dzs.hr/media/0h4n5q5v/podaci_proslih_popisa.xlsx
- Čipin, I. (2022). Starenje i dugovječnost u Hrvatskoj i Europi: Više socijalni nego biološki problem [Aging and longevity in Croatia and Europe: A social problem more than a biological problem]. *Perspektive*, 12(1–2), 48–52.
- Čipin, I., Akrap, A., Knego, J., Međimurec, P., & Đurđević, K. (2014). *Demografski scenariji i migracije: Stručna podloga za izradu Strategije prostornog razvoja Republike Hrvatske* [Demographic scenarios and migrations: Expert basis for the development of the spatial development strategy of the Republic of Croatia]. Sveučilište u Zagrebu, Ekonomski fakultet, Katedra za demografiju. https://mpgi.gov.hr/UserDocsImages//dokumenti/Prostorno/StrategijaPR//Demografski_scenariji_i_migracije.pdf
- European Commission. (2021). *Green paper on ageing: Fostering solidarity and responsibility between generations* (COM(2021) 50 final). https://commission.europa.eu/system/files/2021-06/green_paper_ageing_2021_en.pdf
- European Commission. (2023). *Demographic change in Europe: A toolbox for action* (COM(2023) 577 final). https://commission.europa.eu/publications/communication-demographic-change-europe-toolbox-action_en
- Eurostat. (n.d.). *Population structure indicators at national level* [Data set]. Eurostat. https://ec.europa.eu/eurostat/databrowser/view/demo_pjanind__custom_8566543/default/table?lang=en
- Friganović, M. (1990). *Demogeografija: Stanovništvo svijeta (Demogeography: The population of the world)*. Školska knjiga.
- Gelo, J. (1987). *Demografske promjene u Hrvatskoj od 1780. do 1981. godine*. Globus.
- Gelo, J. (1999). Ratni učinci na promjene demografskih struktura u Hrvatskoj (War effects on changes in demographic structures in Croatia), *Društvena istraživanja*, 43–44(5–6), 735–749. <https://hrcak.srce.hr/file/31867>

- Gelo, J., Akrap, A., & Čipin, I. (2005). *Temeljne značajke demografskog razvoja Hrvatske (bilanca 20. stoljeća)*. Ministarstvo obitelji, branitelja i međugeneracijske solidarnosti.
- Graovac Matassi, V., & Josipović, D. (2023). Different demographic pathways of the post-socialist transition: Mortality trends in Croatia and Slovenia during COVID-19. *Razprave in gradivo: Revija za narodnostna vprašanja*, 91, 115–138. <https://doi.org/10.2478/tdjes-2023-0017>
- Josipović, D. (2024). Depopulation and deep aging: The former Yugoslav and Western Balkans space between the second demographic transition and emigration. *Stanovništvo*, 62(S1), S57–S84. <https://doi.org/10.59954/stnv.615>
- Nejašmić, I. (1991). *Depopulacija u Hrvatskoj: Korijeni, stanje, izgledi (Depopulation in Croatia: roots, condition, prospects)*. Globus.
- Nejašmić, I. (1992). Promjene u dobno-spolnom sastavu stanovništva istočnojadranskog otočja (1953–1991) [Changes in the age and sex composition of the population of the eastern Adriatic islands (1953–1991)]. *Acta geographica Croatica*, 27, 15–34. <https://hrcak.srce.hr/file/142362>
- Nejašmić, I. (2003). Značajke biološkog (demografskog) sastava stanovništva Hrvatske [Characteristics of the biological (demographic) composition of the population of Croatia]. *Hrvatski geografski glasnik*, 65(2), 29–54. <https://doi.org/10.21861/HGG.2003.65.02.02>
- Nejašmić, I. (2005). *Demogeografija; Stanovništvo u prostornim odnosima i procesima* [Human geography; Population in spatial relations and processes]. Školska knjiga.
- Nejašmić, I. (2008). *Stanovništvo Hrvatske: Demogeografske studije i analize* [Population of Croatia: Demogeographical studies and analyses]. Hrvatsko geografsko društvo.
- Nejašmić, I., & Toskić, A. (2013). Starenje stanovništva u Hrvatskoj – sadašnje stanje i perspektive [Population aging in Croatia – current situation and perspectives]. *Hrvatski geografski glasnik*, 75(1), 89–110. <https://doi.org/10.21861/HGG.2013.75.01.05>
- Nejašmić, I., & Toskić, A. (2016). Ostarjelost stanovništva seoskih naselja Republike Hrvatske [Aging of the population of rural settlements of the Republic of Croatia]. *Migracijske i etničke teme*, 32(2), 191–219. <https://doi.org/10.11567/met.32.2.2>
- Obadić, A., & Smolić, Š. (2008). Ekonomske i socijalne posljedice starenja stanovništva [Economic and social consequences of population aging]. *Ekonomski istraživanja*, 21(2), 86–98. <https://hrcak.srce.hr/file/59980>
- Peračković, K., & Pokos, N. (2015). U starom društvu–Neki sociodemografski aspekti starenja u Hrvatskoj [In the old society–some sociodemographic aspects of aging in Croatia]. *Društvena istraživanja*, 24(1), 89–110. <https://doi.org/10.5559/di.24.1.05>
- Podgorelec, S., & Klempić, S. (2007). Starenje i neformalna skrb o starim osobama u Hrvatskoj [Aging and informal care for older adults in Croatia]. *Migracijske i etničke teme*, 23(1–2), 111–134. <https://hrcak.srce.hr/file/22145>

- Pokos, N. (2021). Demografske tendencije u svijetu i u Hrvatskoj. Trpimo potpuni demografski slom [Demographic tendencies in the world and in Croatia. We are suffering a complete demographic breakdown]. *Perspektive*, 11(3–4), 131–140.
- Pokos, N., & Peračković, K. (2016). Promjene u strukturi radno aktivnog stanovništva od 1971. do 2011 [Changes in the structure of the working population from 1971 to 2011]. *Društvena istraživanja*, 46(3), 297–323. <https://doi.org/10.5613/rzs.46.3.3>
- Puljiz, V. (2016). Starenje stanovništva – izazov socijalne politike [Population aging – a social policy challenge]. *Revija za socijalnu politiku*, 25(1), 81–95. <https://doi.org/10.3935/rsp.v23i1.1281>
- Siegel, J. S., & Swanson, D. A. (Eds.). (2004). *The methods and materials of demography*. Elsevier.
- Stipetić, V. (1994). Ekonomski problemi koje donosi starenje stanovništva, *Ekonomija*, 1(1–3), 113–117.
- United Nations, Department of Economic and Social Affairs, Population Division. (2024). *World population prospects 2024: Demographic indicators by region, subregion and country, annually for 1950–2100* (File GEN/01/REV1) [Data set].
- Wertheimer-Baletić, A. (1995). Demografska kretanja u Hrvatskoj – tendencije i perspektive [Demographic trends in Croatia – tendencies and perspectives]. In P. Aračić (Ed.), *Obitelj u Hrvatskoj – stanje i perspektive: Zbornik radova studijskih dana u Đakovu* (pp. 9–24). Biskupski ordinarijat; Zavod za znanstveni rad HAZU
- Wertheimer-Baletić, A. (1999). *Stanovništvo i razvoj* [Population and development]. MaTe.
- Wertheimer-Baletić, A. (2001). Stanovništvo Hrvatske – sadašnje stanje i buduće promjene [Population of Croatia – current situation and future changes]. *Rad Hrvatske akademije znanosti i umjetnosti*, 482, 109–125.
- Wertheimer-Baletić, A. (2002). Reprodukcijska radno-sposobnog stanovništva u Hrvatskoj [Reproduction of the working-age population in Croatia]. In I. Čizmić (Ed.), *Zbornik uz 70-godišnjicu Dragutina Pavličevića* (pp. 421–429). Institut društvenih znanosti Ivo Pilar. https://www.pilar.hr/wp-content/images/stories/dokumenti/zbornici/pavlicevic/pavlicevic_421.pdf
- Wertheimer-Baletić, A. (2004). Depopulacija i starenje stanovništva – temeljni demografski procesi u Hrvatskoj [Depopulation and population aging – basic demographic processes in Croatia]. *Društvena istraživanja*, 72–73(4–5), 631–651. <https://hrcak.srce.hr/file/24554>
- Wertheimer-Baletić, A. (2007). Depopulacija, starenje stanovništva i populacijska politika u Hrvatskoj [Depopulation, population aging and population policy in Croatia]. *Rad Hrvatske akademije znanosti i umjetnosti*, 498, 73–120.
- Živić, D. (2003a). Demografske odrednice i posljedice starenja stanovništva Hrvatske [Demographic determinants and consequences of the aging population of Croatia]. *Revija za socijalnu politiku*, 10(3–4), 307–319. <https://hrcak.srce.hr/file/47624>

- Živić, D. (2003b). Suvremene tendencije u razvoju stanovništva Hrvatske [Contemporary tendencies in the development of the Croatian population]. *Diacovensia*, 11(2), 253–279. <https://hrcak.srce.hr/file/62977>
- Živić, D., Pokos, N., & Turk, I. (2005). Basic demographic processes in Croatia. *Hrvatski geografski glasnik*, 67(1), 27–44. <https://hrcak.srce.hr/file/1399>
- Živić, D., Turk, I., & Šimunić, N. (2017). Promjene u dobnom sastavu stanovništva Hrvatske kao indikator demografskog starenja [Changes in the age composition of the population of Croatia as an indicator of demographic aging]. In I. Markešić (Ed.), *Čovjek i smrt: Teološki, filozofski, bioetički i društveni pristup* (pp. 531–550). Institut društvenih znanosti Ivo Pilar; Hrvatsko katoličko sveučilište; Udruga Posmrtna pripomoć.

POVZETEK

HRVAŠKO PREBIVALSTVO MED NAJSTAREJŠIMI NA SVETU (SPREMEMBE V STAROSTNI STRUKTURI, 1991–2021)

Juraj Pokos, Rebeka Mesarić Žabčić, Nenad Pokos

Starostna struktura prebivalstva je iz več razlogov najpomembnejša demografska struktura. Pomembna je predvsem zato, ker predstavlja demografski okvir za vzpostavljanje reproduktivnega (vitalnega) in delovno aktivnega (delovnega) potenciala prebivalstva. Poleg tega trendi spreminjanja starostne strukture neposredno vplivajo na naravna in mehanična (migracijska) gibanja prebivalstva, s tem pa tudi na splošno demografsko dinamiko (spremembe števila prebivalstva) na določenem območju. Procesi spreminjanja starostne sestave hrvaškega prebivalstva so hkrati posledica in determinanta vseh relevantnih dejavnikov in komponent splošnega in naravnega upadanja števila prebivalstva na Hrvaškem. To je predvsem posledica dejstva, da so imeli vsi procesi, ki od leta 1991 vplivajo starostno strukturo hrvaškega prebivalstva, negativne razvojne značilnosti. To velja predvsem za stalno zmanjševanje rodnosti in s tem povezano povečanje umrljivosti, posledica česar je stalno naravno zmanjševanje prebivalstva od leta 1991 naprej. Poleg tega je za Hrvaško, zlasti od leta 2013 naprej, značilna intenzivna emigracija, predvsem mlajšega prebivalstva. Ti dejavniki so prispevali k intenzivnemu staranju prebivalstva, zaradi česar se Hrvaška po nekaterih kazalnikih uvršča med države z najstarejšim prebivalstvom na svetu.

Avtorji v članku na podlagi več analitičnih kazalnikov, s pomočjo katerih so kvantificirali in opredelili stopnjo staranja hrvaškega prebivalstva, predstavijo spremembe v starostni sestavi prebivalstva na Hrvaškem med letoma 1991 in 2021. Staranje prebivalstva se, najenostavneje povedano, kaže v zmanjšanju števila in deleža (koeficient mladosti) mladih (do 19 let) ter v povečanju števila in deleža (koeficient starosti) starejših (nad 60 let) v celotnem prebivalstvu. Tako se je na primer v obdobju 1991–2021 koeficient mladosti zmanjšal s 26,2 na 19,2, koeficient starosti pa povečal s 17,5 na 29,9. Z drugimi besedami, delež mladih v celotnem prebivalstvu Hrvaške je padel pod petino, delež starejših pa narasel na skoraj tretjino celotnega prebivalstva. V istem obdobju se je delež prebivalstva, starega do 14 let, zmanjšal z 19,4 % na 14,3 %, delež prebivalstva, starejšega od 65 let, pa se je povečal z 11,6 % na 22,5 % – to pomeni, da se je v le tridesetih letih skoraj podvojil!

Zaradi dolgoročne narave demografskih sprememb, vse bolj neugodnih trendov razvoja prebivalstva in njihovega negativnega vpliva na družbeno-gospodarski razvoj sta nujni celovita zasnova in izvedba aktivnega konceptu prebivalstvene in družinske politike. To je treba podpreti še s spodbujanjem pozitivnega družbenega ozračja do otrok, zakonske zveze in družine, s krepitvijo odgovornega starševstva ter z zagotavljanjem gospodarske rasti, ki omogoča zaposlovanje. Poleg tega je treba omogočiti lažji dostop do stanovanj ter uveljaviti druge spodbujevalne ukrepe prebivalstvene in družinske politike, zlasti na področjih delovne in davčne zakonodaje.

THE PHENOMENON OF “BALKAN ISLAM” AS A FACTOR OF INTERCULTURAL AND ETHNO-SOCIAL DIALOGUE

Nina Bilokopytova,^I Karim El Guessab,^{II} Volodymyr Bilokopytov^{III}

COBISS: 1.01

ABSTRACT

The Phenomenon of “Balkan Islam” as a Factor of Intercultural and Ethno-Social Dialogue

This article reconceptualizes “Balkan Islam” as a dynamic and translocal phenomenon shaped by migration, imperial legacies, and contemporary transnational processes. It moves beyond essentialist approaches by analyzing “Balkan Islam” as a context-dependent configuration of practices, institutions, and identities. Using an interpretive and metamodern framework, the study highlights the oscillation between local and global, tradition and modernity. The findings show that “Balkan Islam” functions as a mediating space of intercultural dialogue, where diverse forms of belonging are continuously negotiated in historically plural societies.

KEYWORDS: Balkan Islam, migration, transnationalism, “Ottoman heritage”, ethno-social identity, metamodernity

IZVLEČEK

Fenomen »balkanskega islama« kot dejavnik medkulturnega in etnično-socialnega dialoga

Avtorji v prispevku na novo konceptualizirajo »balkanski islam« kot dinamičen in translokalni pojav, na katerega vplivajo migracije, imperialna dediščina in sodobni transnacionalni procesi. Analizirajo ga onkraj esencialističnega vidika, kot kontekstualno pogojeno konfiguracijo praks, institucij in identitet. V svoji študiji z uporabo interpretativnega in metamodernega okvira izpostavljajo prepletanje lokalnega in globalnega, tradicije in modernosti. Njihove ugotovitve kažejo, da »balkanski islam« deluje kot prostor medkulturnega dialoga, kjer se v zgodovinsko pluralnih družbah nenehno vzpostavljajo raznolike oblike pripadnosti.

KLJUČNE BESEDE: balkanski islam, migracije, transnacionalizem, »osmanska dediščina«, etnično-socialna identiteta, metamodernost

^I PhD in philosophy; Zaporizhzhia National University, Department of Philosophy, Public Administration and Social Work, Zaporizhzhia; nina_turk@ukr.net; ORCID <http://orcid.org/0000-0002-7260-0705>

^{II} PhD in philosophy; Zaporizhzhia National University, Department of Philosophy, Public Administration and Social Work and the Study Abroad Resource Center for Foreigners and Stateless Persons, Zaporizhzhia; karimk@ukr.net; ORCID <http://orcid.org/0000-0003-3555-1235>

^{III} PhD student in philosophy; Zaporizhzhia National University, Department of Philosophy, Public Administration and Social Work, Zaporizhzhia; volodymyr_bil96@meta.ua; ORCID <http://orcid.org/0000-0003-4726-6626>

INTRODUCTION

In recent decades, the study of Islam in the Balkans has increasingly attracted scholarly attention within the broader fields of migration studies, sociology of religion, and post-imperial transformations. This growing interest reflects not only the historical significance of Islam as a constitutive element of the region but also its evolving role in the context of globalization, transnational mobility, and shifting political landscapes. As numerous scholars have demonstrated, Muslim communities in the Balkans cannot be understood as a uniform or monolithic entity; they represent internally differentiated formations shaped by diverse historical trajectories, institutional frameworks, and patterns of belonging (Öktem, 2011; Merdjanova, 2013).

At the same time, the concept of “Balkan Islam” has emerged in both academic and political discourse as a shorthand for describing these complex configurations. However, its analytical status remains ambiguous. On the one hand, it denotes a specific regional form of Islam, often associated with Ottoman legacies, relative institutional moderation, and embeddedness in European sociopolitical contexts. On the other hand, critics point to the risk of essentializing a highly heterogeneous field of religious practices and identities. This tension reveals a broader epistemological problem: how to conceptualize Islam in the Balkans without reducing it to either a fixed cultural type or a purely fragmented set of local variations.

This article addresses this problem by proposing to interpret “Balkan Islam” not as a bounded entity but as a dynamic and relational sociocultural formation, constituted through historical processes of migration, imperial governance, and contemporary transnational interactions. In this perspective, Islam in the Balkans is approached as a field in which multiple layers of identity—religious, ethnic, linguistic, and political—intersect and are continuously renegotiated. The region itself, frequently described in the literature as a linguistic, ethnic, and religious mosaic shaped by long-term imperial and post-imperial legacies, provides a particularly revealing context for examining such processes (Hajdarpašić, 2008; Mishkova, 2025).

The main problem addressed in this study, therefore, concerns the conditions under which Islam in the Balkans functions as a medium of intercultural and ethno-social dialogue, rather than merely as a marker of difference or division. This analysis examines how historical patterns of Muslim migration, institutional development, and external influence have shaped a translocal space in which diverse forms of belonging coexist and interact.

MATERIALS AND METHODS

This study adopts an interpretive, transnational, and metamodern-informed approach to examine the phenomenon of “Balkan Islam” within the broader framework of migration studies. It conceptualizes Islam in the Balkans not as a fixed

religious system but as a dynamic and relational sociocultural formation, shaped by historical migrations, post-imperial legacies, and contemporary global flows.

The analysis is situated at the intersection of transnationalism, migration studies, sociology of religion, and metamodern theory. Drawing on the concept of multiple homelands, the study interprets “Balkan Islam” as a mediating structure between local embeddedness and transnational belonging, while also emphasizing its internal ambivalence and processual nature.

A metamodern perspective is introduced here as a sensitivity to oscillation between seemingly opposed paradigms: tradition and modernity, locality and globality, secularization and re-sacralization. Rather than resolving these tensions, the study treats them as constitutive of Balkan Islamic experience. In this sense, “Balkan Islam” is understood as a space of ongoing negotiation, where identities are continuously re-articulated across shifting historical and cultural horizons.

For analytical clarity, the concept is operationalized along three interrelated dimensions: post-imperial continuity—Islam as a legacy of Ottoman institutional and cultural formations shaping long-term patterns of mobility and identity; ethno-religious articulation—the intertwining of religious affiliation with ethnic and national identities in post-Ottoman and post-socialist contexts; transnational reconfiguration—the role of contemporary migration, diasporic networks, and external actors, especially Turkey, in reshaping symbolic and institutional landscapes.

The following questions guided the study:

1. How have historical and contemporary migration processes contributed to the formation of “Balkan Islam” as a translocal phenomenon?
2. In what ways does Islam function as a resource for negotiating multiple and shifting forms of belonging in Balkan societies?
3. How do transnational flows and external influences reshape the internal structure of Balkan Islamic identities and their role in intercultural dialogue?

The research follows a qualitative comparative case study design, focusing on Bosnia and Herzegovina, Albania, Slovenia, and Croatia. These cases were selected to reflect variation in migration histories, religious configurations, and degrees of transnational embeddedness.

The comparative perspective enables the identification of both structural continuities and context-specific variations. At the same time, the metamodern lens allows us to interpret these differences not as contradictions but as coexisting and interacting modalities of social reality.

Hermeneutic (interpretive) analysis is employed to examine how Islam in the Balkans is represented and understood within academic, political, and institutional discourses, with particular attention to meanings of identity, heritage, and belonging. Qualitative content analysis is used to identify recurring narratives related to

“Ottoman heritage,” “European Islam,” and external influence, focusing on how these narratives construct symbolic boundaries and mediate intercultural interaction. Socio-historical analysis reconstructs key phases of migration and institutional development, from Ottoman expansion to post–Cold War transformations. Comparative analysis facilitates cross-case evaluation of how different sociopolitical contexts shape the relationship between Islam, migration, and identity formation.

The study relies on secondary qualitative data, including peer-reviewed literature in migration studies, Islamic studies, and Balkan studies; analytical reports and policy documents; official materials of Islamic organizations; and relevant media and public discourse sources. A critical approach to sources is maintained, distinguishing between academic knowledge, policy narratives, and ideologically embedded representations.

The analysis proceeds in three stages: historical mapping—tracing migration processes and their institutional and cultural consequences; discursive differentiation—identifying how Islam is framed within narratives of identity, belonging, and heritage; metamodern synthesis—interpreting “Balkan Islam” as a fluid and evolving formation that oscillates between tradition and transformation, functioning as a mediating space of intercultural and ethno-social dialogue. This strategy moves beyond static or binary interpretations and situates the study within contemporary debates on mobility, hybridity, and the plurality of belonging in migration contexts.

RESULTS AND DISCUSSION

The Genesis of Islam in the Balkans

The emergence and development of Islam in the Balkans and Southeastern Europe are closely linked to the history of the Ottoman Empire, which lasted from 1299 to 1922 and at its height extended from the approaches of Vienna to Yemen and East Africa, and from Algeria to the Caspian region (İnalçık, 1973; Imber, 2002; Barkey, 2008).

In 1352, the Ottomans, based in Asia Minor, crossed the Dardanelles and established a foothold in Thrace, marking the beginning of their expansion into the Balkans (İnalçık, 1973; Imber, 2002). The consolidation of Ottoman rule in the region was not solely a military process but was also supported by religious and social actors, particularly Sufi brotherhoods. These groups played a significant role in facilitating the integration of newly conquered territories by providing a religious framework that combined spiritual authority with social organization (Ocak, 2005; Kafadar, 1995).

The Bektashi Sufi order (Bektashiya), founded in the thirteenth century, played a significant role in the Islamization of the Balkans. The order’s doctrine integrates elements of Shiism, pantheism, and pre-existing Christian practices, which facilitated its influence among local populations, including former Christians who converted to Islam in Turkey, Bosnia, and Albania (Mélíckoff, 1992; Norris, 2006). Beyond its doctrinal

teachings, the Bektashi order acted as a social and cultural mediator, establishing lodges that functioned as centers of communal life, education, and ritual practice. Anthropological research shows that such Sufi institutions were not only religious centers but also sites of interfaith interaction: for instance, shared pilgrimage places and local ritual exchanges in Kosovo demonstrate the coexistence and negotiation of religious identities at the everyday level (Duijzings, 2000). These practices contributed to a form of religious pluralism in which Bektashi Sufism facilitated both the integration of converts and the maintenance of cross-religious social ties. Beginning in the fifteenth century, a rapprochement developed between the Bektashi order and the Janissary corps, which secured the order a privileged status within the Ottoman administrative and military framework for several centuries (Norris, 2006; Mélikoff, 1992). This association reinforced the social influence of the Bektashi tariqa, allowing it to consolidate networks of spiritual and communal authority across the Balkans. By the first quarter of the twentieth century, it is estimated that up to 20% of the Albanian population identified with the Bektashi order, highlighting its deep-rooted presence in the region (Mustafa, 2008). Anthropological research further illuminates the local and everyday dimensions of Bektashi practice. Kravanja (2008) examines the ambiguous perceptions of Christianity, Islam, and Bektashism in Macedonia and the wider Balkans, emphasizing how local communities navigated overlapping religious identities and social loyalties. Similarly, Mustafa (2008) explores how the Bektashi order in contemporary Albania localized Ottoman heritage, blending historical practices with modern social and religious realities, thus shaping a distinctive Balkan Islamic identity. These studies underscore that the Bektashi tariqa functioned not only as a religious institution but also as a mediator of cultural continuity, interfaith coexistence, and social integration.

The Islamization of the Balkans has sometimes been identified as one contributing factor significantly facilitated by the influence of various religious and social "heretical" movements, primarily Bogomilism. The fundamental tenet of the Bogomil doctrine held that God could not have created the material world and that entry into the Kingdom of Heaven required extreme asceticism (Brown, 1996; Hajdarpasić, 2008). This movement was one of the largest "heretical" currents in the Balkans and Asia Minor during the tenth to fourteenth centuries. In its early phase, it drew upon Manichaeism, Paulician, and Messalian influences. The intense doctrinal and social confrontation between the Bogomils and established religious authorities, particularly Serbian Orthodoxy and Croatian Catholicism, created conditions that facilitated the voluntary conversion of a substantial portion of the population in the western Balkans to Islam (Brown, 1996). It is important to emphasize that Ottoman successes in the region were not solely due to military power; rather, they were reinforced by the Ottomans' ability to leverage pre-existing social, religious, and cultural fault lines and to integrate local populations into new administrative and religious frameworks (Hajdarpasić, 2008). This interplay of doctrinal pluralism and imperial strategy exemplifies the complex dynamics underlying the spread of Islam in the Balkans.

The empire's prestige at that time was very high in both the East and the West; the arrival of the Ottomans was expected as deliverance from injustice and the triumph of peasant and labor "truth." Ideas about the people's love and tolerance of the Turks led to the idealization of the order in the empire, not only among the broad masses of Europe, but also in the projects for the reconstruction of society of such outstanding thinkers of the late Renaissance as Tommaso Campanella (1568–1639) and Ludovico Zuccolo (1568–1630).

During the late medieval and early modern periods, certain segments of Christian and Jewish populations in Europe expressed favorable attitudes toward the Ottoman Empire, often admiring its administrative efficiency, military prowess, or perceived justice in governance (Finkel, 2005; Faroqhi, 2004). This phenomenon, sometimes characterized as "Turkophile sentiment," was not uniform or widespread but rather context-specific, reflecting local political, economic, and religious circumstances. For instance, in parts of Germany, the successes of the Ottoman army were noted in connection with hopes for relief from local feudal conflicts, as contemporaries such as Ulrich von Hutten recorded, who linked Ottoman campaigns with the broader aspirations of the Reformation (von Hutten, 1862). Similarly, selected literary works and political pamphlets including Hans Rosenplüt's *Das Lied von den Türken / Von den Türken* (ca. 1458/1459) and later Orthodox polemical works such as Zakhariia Kopystensky's *Palinodiia* (1621), attest to localized admiration or fascination with Ottoman institutions. However, these sources reflect particular intellectual or social milieus rather than a generalized European consensus. Overall, these examples suggest that positive perceptions of the Ottoman Empire were mediated by pragmatic considerations such as trade opportunities, political alliances, and the desire for social reform rather than reflecting uncritical or homogeneous admiration across Europe.

The process of Islamization in Bosnia and Herzegovina was particularly pronounced, but it was neither uniform nor solely the result of direct intervention by the Ottoman central administration. Historiography emphasizes that Islamization in the region was a gradual and multifaceted process, shaped by social, fiscal, and political dynamics within the Ottoman imperial framework (Lopašić, 1994). Members of the pre-existing elite often converted to Islam in order to retain property, social status, and access to administrative or military positions. Unlike in many other Balkan regions, this process also extended to sections of the peasant population, reflecting broader patterns of social mobility, economic incentives, and integration within Ottoman governance. From the late seventeenth century to the final decades of the nineteenth century, waves of Muslim refugees from territories recaptured by non-Ottoman powers further increased the Muslim population in Bosnia. Over time, these processes contributed to the formation of a substantial Muslim population of South Slavic origin in Bosnia and Herzegovina (Lopašić, 1994).

The emergence of independent Balkan states in the nineteenth and early twentieth centuries dealt a serious blow to the Ottoman Empire but did not end Turkish

political interest in the region. After World War II, socialist governments across much of the region limited the scope of Turkish engagement, although regional political alignments differed considerably. Following the end of the Cold War and the reconfiguration of regional politics, Turkey expanded its activity in the Balkans. This engagement intensified after the Justice and Development Party came to power under Recep Tayyip Erdoğan in late 2002. In recent years, the problems of the Balkan direction in Ankara's foreign policy have repeatedly attracted the attention of foreign authors (Aydıntaşbaş, 2019; Dede, 2014). Some researchers have examined the historical aspects of the Turkish presence in the Balkans and their projection on the current situation in the region (Şener, 2019; Bebler, 2017). Many foreign scholarly publications have been devoted to the Turkish and Muslim communities in the Balkans (Sancaktar, 2019; Öktem, 2011).

The emergence of Islam in the Balkans from the beginning of Ottoman expansion into the region in the fourteenth century through the later Ottoman period was a complex, multilayered process shaped by Ottoman political structures, social and fiscal incentives, and the mediation of Sufi orders such as the Bektashiya (Mélíkov, 1992; Norris, 2006). Pre-existing heterodox movements, like Bogomilism, facilitated the gradual integration of local populations into Islamic frameworks, particularly in Bosnia and Herzegovina, where social mobility and local conditions influenced conversion patterns (Brown, 1996; Lopašić, 1994). This Ottoman-era spread and institutionalization of Islam created a distinctive Muslim South Slavic identity and highlights the enduring interplay between imperial governance, religious pluralism, and local social realities in the Balkans (Hajdarpašić, 2008; Duijzings, 2000).

The Balkans as an "Ottoman heritage" and as part of the Islamic world

In the socio-philosophical and political discourse, Turkey's strategy toward Balkan Muslim communities is underpinned by several interrelated ideas. First, the Balkans are often framed as part of Turkey's "Ottoman heritage," reflecting the historical legacy of centuries of Ottoman governance, which continues to inform cultural diplomacy and bilateral relations (Hajdarpašić, 2008; Brown, 1996). Second, the Balkans are conceptualized as part of the broader Islamic world, emphasizing shared religious, cultural, and linguistic ties that foster a sense of transnational belonging and solidarity (Öktem, 2011; Merdjanova, 2013). Finally, Turkey draws on the notion of a shared cultural heritage between the Balkans and Anatolia, highlighting historical continuities in architecture, rituals, cuisine, and social organization as foundations for contemporary political and social engagement (Şener, 2019; Sancaktar, 2019). Together, these discursive frameworks provide both ideological justification and practical rationale for Ankara's policies aimed at maintaining influence and nurturing socio-religious networks across the Balkans.

Ahmet Davutoğlu—an academic, former diplomat, and Turkey's 26th prime minister—argues that this "Ottoman heritage" gives modern Turkey unique

opportunities in the Balkans (Davutoğlu, 2010, pp. 122–123). He also maintains that the Turkish leadership should secure international legal protection for ethno-confessional minorities (Davutoğlu, 2010, p. 123). Davutoğlu's ideas have been influential in scholarly and policy discussions of Turkey's renewed engagement with the Balkans. Turkish researchers have similarly argued that modern Turkey occupies a "special and unique position" in the Balkans as an increasingly active representative of "Balkan Turks and Muslims in the international arena" (Şener, 2019, p. 387). Balkan authors of Turkish origin believe that "Turkey, as the heir to the Ottoman Empire, has a moral responsibility to provide assistance to the Balkan countries" (Aljaf, 2016, p. 229). Slovenian researcher A. Zalta writes that part of the population of the Balkan countries perceives Islam in the Balkans as a consequence of the Ottoman conquest, an "anachronism," "a foreign body on European soil that should have disappeared with the departure of the Ottomans" (Zalta, 2016, p. 86). Critics of Turkish policy began to call it "neo-Ottomanism," attributing to this term an expansionist agenda, including religious expansion (Ekinci, 2013, p. 24).

The relationship between Balkan Muslim communities and modern Turkey is complex and variegated, reflecting historical legacies, local religious traditions, and contemporary political dynamics. While some studies suggest that Muslim minorities, including Turkish diasporas, view Turkey as a protector of their ethno-confessional interests, reinforcing Ankara's self-perception as a patron (Öktem, 2011, p. 162), this generalization risks oversimplifying local realities. In Albania, for instance, secular authorities exhibit a cautious stance toward the Ottoman heritage, despite the predominantly Muslim population, indicating that religious affiliation does not automatically translate into political or cultural alignment with Turkey. Furthermore, the historical role of Bektashism complicates the picture: as an Anatolian-origin order integrated into Albanian and Western Macedonian social life, it reflects syncretic religious practices and localized forms of identity that mediate but do not necessarily reproduce connections to modern Turkey (Duijzings, 2000; Mustafa, 2008). In Kosovo, Duijzings (2000) emphasizes the nuanced coexistence of multiple religious and ethnic groups, illustrating that perceptions of Turkey and the Ottoman past are contingent, context-specific, and mediated through local histories of interfaith interaction rather than straightforward ethno-religious loyalty. This suggests that contemporary Turkish influence in the Balkans must be understood as filtered through complex layers of historical memory, local religious practice, and regional politics.

The perception of the Balkans as part of the broader Muslim world continues to inform contemporary Turkish intellectual and political discourse. As noted by President Erdoğan's press secretary İbrahim Kalın, "Since the Balkans joined the larger Muslim world, the Turks began to consider this region their home" (Kalın, 2018). Kalın's sentiment reflects not merely historical memory but an ongoing cultural and ideological framing in which the Balkans are understood as a space of shared religious and civilizational heritage. The fourth volume (modern context) of the

five-volume work *Islam in the Balkans* (Kafkasyalı, 2016),¹ published by the Turkish Cooperation and Coordination Agency (TIKA) in 2016, exemplifies this discourse by presenting a range of scholarly contributions from both Turkish and Balkan authors that address the history, culture, and contemporary situation of Muslim communities in the region. A brief discourse analysis of the later volumes indicates that they do not merely document historical facts: titles such as "From the conquest of hearts to the representation of mentality," "From times of glory to times of humility," and "Demolishing mentality which demolishes bridges" suggest a normative and evaluative stance, framing the Ottoman and post-Ottoman legacies in moral and civilizational terms and implicitly guiding readers toward a particular understanding of Balkan Islam as culturally and spiritually linked to Turkey. This framing resonates with broader trends in Turkish soft power strategies in the region, emphasizing cultural continuity and religious affinity while simultaneously projecting contemporary political narratives.

Turkish historian K. Karpat, in his contribution to the abovementioned five-volume work *Islam in the Balkans*, proposes a broad periodization for understanding the development of Islam in the region, distinguishing three key phases: the early presence of Turkic groups in the Balkans, the institutionalization and spread of Islam during the Ottoman period, and the contemporary phase marked by renewed Muslim migrations since the late twentieth century (Karpat, 2016, p. 101). Karpat further suggests that certain forms of cultural continuity may have persisted among populations historically connected to Turkic groups, thereby facilitating later cultural and religious interactions. However, such interpretations should be approached with caution. The linkage between ethnicity and religion in the Balkan context remains highly complex and contested, and the notion of a uniform trajectory of Islamization across "the Balkan peoples" risks oversimplification. A substantial body of scholarship emphasizes instead the fragmented, locally embedded, and plural character of Islam in the Balkans, shaped by diverse historical experiences, regional dynamics, and the coexistence of multiple Islamic traditions and institutions (Öktem, 2011; Merdjanova, 2013). From this perspective, Karpat's framework can be read as one interpretive model among others, rather than a comprehensive explanation of the region's religious transformations.

The Turkish political establishment recognizes the exceptional contribution of people from the Balkans to the formation of Ottoman and Turkish culture. According to İ. Kalın, "it is impossible to understand the art, cultural, religious and political life of the Ottomans without taking into account the colossal contribution of writers, scientists and politicians of Balkan origin" (Kalın, 2018). In the Ottoman period, many

1 The five volumes of *Balkanlarda İslâm* (Kafkasyalı, 2016) are titled: 1) *Muğlaklıktan berraklığa* [From ambiguity to clarity]; 2) *Türkistan'dan Balkanlara* [From Turkestan to the Balkans]; 3) *Gönül fethinden zihniyet temsiline* [From the conquest of hearts to the representation of mentality]; 4) *Vakti azizden vakti zelalet* [From times of glory to times of humility]; 5) *Köprüler yıkan zihniyetin yıkılışı* [Demolishing the mentality that demolishes bridges].

great viziers and military leaders came from the Balkans, as did scholars and cultural figures, including the celebrated Ottoman architect Mimar Sinan, whose name is given to the university in modern Istanbul. In the Republican period, such figures include the first president, Mustafa Kemal Atatürk (Mango, 2002, p. 27), the author of the Turkish anthem, Mehmet Akif Ersoy, and poet and writer Yahya Kemal Beyatlı.

The concept of the “Balkan region” is broader and more flexible, referring to a historical-cultural and sociopolitical space characterized by ethnic, linguistic, and religious diversity, as well as by shared historical experiences, including Ottoman governance, socialist modernization, and post–Cold War transformations (Mishkova, 2025; Hajdarpašić, 2008). In contemporary scholarship, the Balkan region is often understood as a relational and processual construct, whose boundaries shift depending on the analytical framework: geographical, political, or cultural (Bjelić & Savić, 2002). This approach emphasizes that the Balkans are not a fixed entity but a dynamic intersection of identities, discourses, and power relations.

The Turkish state supports various projects in the Balkan countries to preserve and promote this heritage: Ottoman buildings are being restored, catalogs of Ottoman manuscripts stored in libraries and archives are being compiled, and courses are being opened where one can learn Islamic arts (Ekinci, 2013, p. 23). Preservation and restoration of cultural heritage in the Balkans is a “constant priority” of the Turkish Foreign Ministry (Türkiye Cumhuriyeti Dışişleri Bakanlığı, 2020). Turkey is actively involved in restoring Ottoman-era heritage and in constructing schools and educational centers in areas with significant Muslim populations. The Turkish language and culture are popularized in the Balkans through a network of institutes named after Yunus Emre, established in various cities. A prominent example of Ankara’s cultural engagement is its policy toward Bosnia and Herzegovina. By 2019, just a decade after the opening of the first Yunus Emre Institute in the Balkans, more than 5,000 people had participated in Turkish-language courses at its Sarajevo branch. A project was launched in seven cantons across the country to teach Turkish as an elective foreign language in secondary schools, with 8,000 Bosnian students participating (Yunus Emre Enstitüsü, 2019). In this sense, the promotion of Turkish language and culture, including through institutions such as the Yunus Emre Institutes, reflects a combination of cultural diplomacy and strategic engagement, rather than a purely heritage-driven agenda.

Muslims in the Balkans are diverse not only ethnically and linguistically but also in their religious affiliations and practices. Most belong to the Sunni Hanafi madhhab, which was the dominant legal school in the Ottoman imperial context. Other Islamic traditions have also long been present in the region, including Alevism in Bulgaria and the Bektashi Sufi order in Albania and North Macedonia. In recent decades, religious expansion by some Arab states has contributed to the emergence of Salafi currents in parts of the Balkans. Salafi movements generally seek to purify Islam of practices they regard as later accretions, including practices associated with local, ethnic, or cultural traditions. They also reject forms of intercession and criticize

many Sufi practices as incompatible with their understanding of Islam (Gauvain, 2012, p. 305).

It should be noted, however, that this overview does not fully capture the internal diversity of Islamic traditions in the Balkans. In addition to Bektashism, several other Sufi orders, such as the Rifa'i and Naqshbandi, have played a significant role, particularly in regions like North Macedonia, contributing to a rich and locally embedded religious landscape. Moreover, anthropological studies emphasize that these affiliations are often fluid and intersect with local practices and identities; for example, Duijzings (2000) demonstrates the existence of complex, syncretic forms of religious life in Kosovo that transcend clear doctrinal boundaries. Therefore, rather than a linear differentiation between "traditional" and "reformist" currents, the religious field in the Balkans is better understood as a plural and dynamic constellation of overlapping practices, institutions, and interpretations.

Islamic organizations in the Balkans

Albania

Albania has historically been regarded as one of Europe's few Muslim-majority countries. According to the 2023 Albanian census, there were 1,101,718 Muslims in the country (45.7% of the country's population) and 115,644, Bektashi (4.8%) (Religious belief and minorities, 2024). It is worth noting that several decades of communism have led to the fact that the majority of citizens of modern Albania lead a secular lifestyle, although they can formally be considered Muslims. The Muslim Community of Albania (MCA) is the largest Sunni organization in Albania and is recognized by the state as a national organization (Komuniteti Mysliman i Shqipërisë, n.d.). The MCA runs most of the mosques. It was founded in 1923 and reorganized in 1991.

Recognized by the state as a national organization and as a separate religious community, the World Bektashi Headquarters is the largest Sufi organization in Albania and presents itself as the order's international headquarters, although this status is disputed by some other Bektashi representatives (Kryegjyshata Botërore Bektashiane, n.d.). The Muslim Forum of Albania was founded in 2005 but does not have official state recognition. Its main objectives are to combat racism, Islamophobia, and xenophobia (Muslim Forum of Albania, n.d.).

At the same time, the contemporary institutional presence of Bektashism in Albania cannot be fully understood without its historical role in the nineteenth-century Albanian national awakening. Scholars have emphasized that the Bektashi order contributed significantly to the Albanian National Awakening by encouraging the use of the Albanian language, supporting educational and literary activities, and promoting a relatively inclusive interpretation of Islam (Skendi, 1967; Clayer, 2007; Elsie, 2010). In this sense, Bektashism has functioned not only as a religious community but also as a historical mediator between religious affiliation and national

consciousness, which adds an important layer to its current institutional and social significance.

Bosnia and Herzegovina

As of 2013, Muslims accounted for 50.7% of the population in Bosnia and Herzegovina. It is generally accepted that Islam arrived in Bosnia with the Ottoman troops in the fifteenth century. Most of the Muslim population of Bosnia and Herzegovina is descended from local populations that converted to Islam during the Ottoman period from the mid-fifteenth century to 1878.

Bosnia and Herzegovina is a secular state with no official religion (Constitution of Bosnia and Herzegovina, 1995). Relations between the state and religious communities are regulated by the Law on Freedom of Religion and the Legal Status of Churches and Religious Communities in Bosnia and Herzegovina (2004). This legal framework guarantees religious freedom, recognizes the legal status of religious organizations, and defines the principles of their interaction with state institutions. Basic agreements have been concluded with major religious communities, including the Catholic Church (Holy See & Bosnia and Herzegovina, 2006), while relations with the Islamic Community have developed within a broader and evolving institutional framework. The principal representative body of Muslims in the country is the Islamic Community in Bosnia and Herzegovina (ICBH), which functions as an autonomous religious institution responsible for organizing religious life, education, and community activities (Islamska zajednica u Bosni i Hercegovini, n.d.). At the same time, the contemporary structure of Islamic institutions in Bosnia and Herzegovina should be understood in light of the region's complex historical development. The formation of the Muslim population cannot be reduced to a single process of conversion but reflects a multilayered historical trajectory shaped by Ottoman governance, social mobility, regional diversity, and long-term processes of cultural and religious transformation, as emphasized in the historiography.

The ICBH, according to its Constitution, is "the sole and unique community of Muslims living in Bosnia and Herzegovina, of Bosniaks living outside their homeland and other Muslims who accept this community as their own" (The Islamic Community – Sentinel and Principles, 2012). The state recognizes the ICBH as the institution that traditionally represents Islam in Bosnia and Herzegovina. It is independent in regulating its activities (rituals, Islamic education, distribution of Islamic donations, publishing, charity, and so on), can manage its property, and is financed mainly through membership fees, *zakat*, and other sources. The ICBH is divided into 9 muftiates in Bosnia, including the Military Muftiate as a super-territorial entity, and 5 units in Slovenia, Croatia, Sandžak in Serbia, Germany, and Australia, along with other umbrella organizations uniting Muslims from Bosnia and Herzegovina in the United States, Austria, and other European countries based on their ethno-religious identity. Educational institutions managed by ICBH include six Islamic universities and

madrasas, a secular school (Bošnjačka gimnazija), and three faculties. At the same time, this organizational description requires clarification. The internal and transnational structure of the ICBH is not uniform and should not be understood as a system of clearly defined “units” in all contexts; its presence outside Bosnia and Herzegovina often takes the form of affiliated, partner, or historically linked organizations, whose degree of institutional integration varies across countries. Furthermore, the educational framework of the ICBH reflects different levels of instruction: madrasas function as secondary religious schools, while higher education is provided through faculties and other tertiary institutions. This distinction is important for accurately understanding the institutional and educational landscape of Islamic communities in the region.

In addition to the ICBH, a number of smaller organizations operate in areas such as religious outreach, culture, scholarship, student affairs, and women’s education. The most significant charitable organization is the Muslim Charitable Society “Merhamet” (Muslimansko dobrotvorno društvo “Merhamet”), founded in 1913. Organizations such as the Nahla Center for Education and Research also contribute to women’s education and community life (Centar za edukaciju i istraživanje Nahla, n.d.).

However, these examples should be understood as illustrative rather than exhaustive, as the landscape of civil and religious initiatives is considerably broader and includes a wide range of local and transnational organizations that contribute to the social, educational, and cultural life of Muslim communities in the country.

Slovenia

In Slovenia, the Islamic Community of the Republic of Slovenia (Slovenian IC) is the main religious organization representing Islam (Islamska skupnost v Republiki Sloveniji, n.d.). It was established in 2007. It employs imams and organizes the religious life of almost all Slovenian Muslims. The Slovenian IC is a branch of the Islamic Community in Bosnia and Herzegovina and adheres to the Sunni direction. Both organizations operate within the framework of the Hanafi legal school (madhhab). Although the community is multiethnic, the overwhelming majority of its members are Bosniaks. Alongside the Islamic Community in Slovenia (IC), other organizations contribute to the country’s Islamic religious landscape. One of these is the Muslim Community of Slovenia (MCS), established and officially registered in 2006 by Osman Đogić, the first Mufti of the Islamic Community in Slovenia (2001–2005), who played a prominent role in advocating for the construction of Slovenia’s first mosque. The establishment of the MCS followed an institutional split within the Slovenian Islamic community, reflecting differences concerning leadership and organizational governance rather than theological doctrine (Slovenska muslimanska skupnost, n.d.; Banjac & Zalta, 2025, 187). Cultural and educational activities connected to Islam and Muslim communities in Slovenia are also carried out by organizations such as the Averroes Cultural and Educational Institute, whose work focuses on intercultural

dialogue and educational programming in areas such as Balkan studies, Oriental studies, Islam, and ethnology (Kulturno-izobraževalni zavod Averroes, n.d.). The coexistence of these organizations demonstrates that the Islamic institutional field in Slovenia is pluralistic and dynamic, evolving through internal organizational developments, differing models of religious representation, and changing patterns of community leadership.

Croatia

The 2021 census in Croatia recorded 50,981 Muslims, representing 1.32% of the country's total population (Croatian Bureau of Statistics, 2023). Among Muslims in Croatia, the largest ethnic group was Bosniaks (21,119), followed by Croats (10,841) and Albanians (7,421) (Croatian Bureau of Statistics, 2023). The presence of Bosniaks in Croatia is also linked to migration from Bosnia and Herzegovina and other parts of the former Yugoslavia, particularly during the second half of the twentieth century. Muslims in Croatia are predominantly Sunni, following the Hanafi school of thought. The Islamic Community of Croatia (ICC) is the only officially registered Islamic religious community in the country (Islamska zajednica u Hrvatskoj, n.d.). The ICC has established cooperation with the government, city, and municipal authorities, as well as relationships with other religious communities. It consists of the Council, the executive body called Meshihat, local Muslim associations, and the Zagreb Islamska gimnazija. The current mufti is Aziz ef. Hasanović (since 2012). In practice, the ICC is an independent religious institution, while maintaining historical, religious, and personnel-based connections with the Islamic Community of Bosnia and Herzegovina.

Metamodern configurations of “Balkan Islam” as a space of intercultural dialogue

Drawing on Vermeulen & van den Akker's (2010) concept of oscillation, the article adopts a metamodern perspective on the phenomenon of “Balkan Islam” that also foregrounds relationality and the coexistence of seemingly contradictory modes of belonging. Rather than viewing Islamic identities in the Balkans through binary frameworks, such as tradition versus modernity, or local versus global, the metamodern lens allows us to conceptualize them as dynamic configurations shaped by continuous negotiation and reinterpretation.

Within this framework, “Balkan Islam” emerges not as a fixed or homogeneous entity, but as a translocal and processual formation, constituted through the interaction of historical legacies and contemporary transformations. The Ottoman past, often invoked in political and cultural discourses, does not function as a static heritage but as a re-signified symbolic resource, selectively mobilized in present-day identity constructions. At the same time, modern nation-state frameworks,

European integration processes, and global economic networks introduce new layers of meaning, generating a field in which identities are neither fully stabilized nor entirely fragmented.

A key feature of this metamodern condition is the oscillation between embeddedness and openness. On the one hand, Muslim communities in the Balkans remain deeply rooted in local histories, linguistic environments, and institutional traditions. On the other hand, they are increasingly integrated into transnational religious, economic, and cultural networks that connect the region to Turkey, the Arab world, and the broader global Islamic sphere. The dual orientation does not necessarily produce conflict; rather, it creates a productive tension that enables multiple forms of identification to coexist and interact.

Migration plays a central role in this process by continuously reconfiguring the boundaries of belonging. Historical population movements, as well as contemporary mobility and diaspora connections, contribute to the formation of multi-sited identities that transcend national and regional frameworks. In this sense, "Balkan Islam" can be understood as a mediating social space, where different cultural logics intersect and where intercultural dialogue is enacted not only at the institutional level but also in everyday practices.

Importantly, the metamodern perspective also highlights the reflexive dimension of these processes. Actors within the region—religious leaders, intellectuals, policymakers, and community members—actively engage with competing narratives of identity, selectively appropriating elements of tradition, modernity, and globality. Such reflexivity is evident, for example, in how Islamic institutions balance doctrinal continuity with social adaptation, and in how local communities negotiate external influences without fully assimilating them.

Thus, "Balkan Islam," when approached as an analytical construct, can be seen as a site of ongoing mediation, where historical depth and contemporary transformation intersect. Its significance lies not only in its religious dimension but in its capacity to facilitate ethno-social and intercultural dialogue in a region historically marked by plurality and contestation. In this regard, the Balkan case illustrates a broader theoretical insight: that religious formations, when understood as fluid and relational, can function as interfaces of dialogue rather than boundaries of division.

In conclusion, the metamodern optic enables a shift from essentialist and static interpretations toward a more nuanced understanding of "Balkan Islam" as a living, evolving, and dialogical phenomenon. It underscores the importance of embracing complexity, ambiguity, and hybridity as constitutive features of contemporary social realities, particularly in regions shaped by layered histories and ongoing transnational entanglements.

CONCLUSIONS

The findings highlight that Islamic identities in the Balkans have been constituted through long-term interactions between migration processes, imperial legacies, and post-imperial reconfigurations. Rather than representing a unified religious or cultural system, “Balkan Islam” reflects a plural, internally differentiated field in which diverse traditions, institutional arrangements, and identity narratives intersect. This plurality is further intensified in the contemporary period by transnational influences, including the activities of Turkey, the Gulf countries, and global Islamic networks, as well as by ongoing processes of mobility and diaspora formation.

A key contribution of the article lies in demonstrating that “Balkan Islam,” when approached as an analytical construct, functions as a mediating framework of intercultural and ethno-social dialogue. It enables the articulation and negotiation of multiple forms of belonging across ethnic, religious, and political boundaries, thereby contributing to maintaining social cohesion in a historically heterogeneous region. In this sense, the Balkan case illustrates how religious formations can operate not only as markers of difference but also as interfaces of interaction and translation between diverse social worlds.

At the same time, the study underscores the importance of analytical caution in the use of the term “Balkan Islam,” given the diversity and fragmentation of Muslim communities in the region, as emphasized in the existing literature. The concept is most productive when employed not as a descriptive category, but as a heuristic device that captures the interplay of local, imperial, and transnational dimensions in the formation of religious identities.

In conclusion, the metamodern optic allows for a more nuanced interpretation of “Balkan Islam” as a fluid, reflexive, and dialogical phenomenon, characterized by ongoing oscillation between tradition and modernity, locality and globality. Such an approach contributes to broader debates in migration studies and the sociology of religion by demonstrating how complex and historically layered religious formations can serve as key sites of intercultural dialogue in contemporary societies marked by plurality and transformation.

RESEARCH DATA ACCESSIBILITY STATEMENT

The authors state that the article is based on secondary scholarly literature, policy and analytical documents, and publicly available institutional materials and media sources, all of which are cited in the reference list.

REFERENCES

- Agencija za statistiku Bosne i Hercegovine. (2019). *Popis stanovništva, kućanstava i stanova u Bosni i Hercegovini: Etnička/nacionalna pripadnost, vjeroispovjest i materinji jezik* [Census of Population, Households and Dwellings in Bosnia and Herzegovina: Ethnicity/National Affiliation, Religion and Mother Tongue] (Knjiga 2 / Book 2). https://popis.gov.ba/popis2013/doc/Knjiga2/K2_H_E.pdf
- Aljaf, B. (2016). Türkiye'nin İlgi Odağında Bosna Hersek. In M. S. Kafkasyalı (Ed.), *Balkanlarda İslâm: Cilt 5* (pp. 223–230). Türk İşbirliği ve Koordinasyon Ajansı Başkanlığı (TİKA).
- Aydıntaşbaş, A. (2019). *From myth to reality: How to understand Turkey's role in the Western Balkans*, European Council on Foreign Relations. Policy brief.
- Banjac, M. & Zalta, A. (2025). 9 Muslim Communities and Religious Freedom in Slovenia. In S. Adak & T. Schmidinger (Ed.), *The Enduring Legacy of the Habsburg Islam Policy: Muslim Communities in Central and Southeast Europe* (pp. 177–191). Edinburgh University Press. <https://doi.org/10.1515/9781399511353-013>
- Barkey, K. (2008). *Empire of difference: The Ottomans in comparative perspective*. Cambridge University Press.
- Bebler, A. (2017). Turkey's imperial legacy and the conflict potential in the Balkans, *Political Science, International Relations*, 10(1), 52–63. <https://doi.org/10.21638/11701/spbu06.2017.106>
- Bjelić, D. I., & Savić, O. (Eds.). (2002). *Balkan as metaphor: Between globalization and fragmentation*. Cambridge, MA: MIT Press.
- Brown, C. L. (1996). *Imperial legacy: The Ottoman imprint on the Balkans and the Middle East*. Columbia University Press.
- Centar za edukaciju i istraživanje Nahla. (n.d.). *Centar za edukaciju i istraživanje Nahla* [Nahla Center for Education and Research]. Retrieved March 17, 2025, from <https://nahla.ba>.
- Clayer N., (2007). *Aux origines du nationalisme albanais: la naissance d'une nation majoritairement musulmane en Europe*, Paris: Karthala.
- Constitution of Bosnia and Herzegovina. (1995). Annex 4 of the General Framework Agreement for Peace in Bosnia and Herzegovina. <https://www.ohr.int/the-general-framework-agreement-annex-4/?print=pdf>
- Croatian Bureau of Statistics. (2023, January 31). *Population by ethnicity and religion, 2021 census* [Data set]. *Statistics in Line*. https://podaci.dzs.hr/media/3hue4q5v/popis_2021-stanovnistvo_rh.xlsx
- Davutoğlu, A. (2010). *Stratejik derinlik: Türkiye'nin uluslararası konumu*. Küre Yayınları.
- Dede, O. (2014). *Balkanlar ve Türkiye* (Rapor No. 64). Bilge Adamlar Stratejik Araştırmalar Merkezi (BİLGESAM).
- Duijzings, G. (2000). *Religion and the politics of identity in Kosovo*. Hurst & Co.
- Ekinci, M. U. (2013). *Turkey's "zero problems" era in the Balkans* (SETA Analysis No. 1). Siyaset, Ekonomi ve Toplum Araştırmaları Vakfı (SETA).

- Elsie, R. (2010). *Historical Dictionary of Albania* (2nd ed.). Lanham, MD: Scarecrow Press.
- Farooqi, S. (2004). *The Ottoman Empire and the world around it*. Tauris.
- Finkel, C. (2005). *Osman's dream: The story of the Ottoman Empire, 1300–1923*. Basic Books.
- Gauvain, R. (2012). *Salafi ritual purity: In the presence of God*. Routledge.
- Hajdarpašić, E. (2008). Out of the Ruins of the Ottoman Empire: Reflections on the Ottoman Legacy in South-eastern Europe. *Middle Eastern Studies*, 44(5), 715–734. <https://doi.org/10.1080/00263200802285278>
- Holy See & Bosnia and Herzegovina. (2006). *Basic Agreement between the Holy See and Bosnia and Herzegovina*. <https://www.iuscangreg.it/conc/bosnia-ed-erzegovina-2006.pdf>
- Imber, C. (2002). *The Ottoman Empire, 1300–1650: The structure of power*. Palgrave Macmillan.
- İnalçık, H. (1973). *The Ottoman Empire: The classical age 1300–1600*. Weidenfeld & Nicolson.
- Islamska skupnost v Republiki Sloveniji. (n.d.). *Islamska skupnost v Republiki Sloveniji* [Islamic Community in the Republic of Slovenia]. Retrieved March 17, 2025, from <https://www.islamska-skupnost.si>.
- Islamska zajednica u Bosni i Hercegovini. (n.d.). *Islamska zajednica u Bosni i Hercegovini* [Islamic Community in Bosnia and Herzegovina]. Retrieved March 17, 2025, from <https://islamskazajednica.ba>.
- Islamska zajednica u Hrvatskoj. (n.d.). *Islamska zajednica u Hrvatskoj* [Islamic Community in Croatia]. Retrieved March 17, 2025, from <https://www.islamska-zajednica.hr>.
- Kafadar, C. (1995). *Between two worlds: The construction of the Ottoman State*. University of California Press.
- Kafkasyalı, M. S. (Ed.). (2016). *Balkanlarda İslâm: Muğlaklıktan berraklığa / Islam in the Balkans: From ambiguity to clarity* (Vols. 1–5). Türk İşbirliği ve Koordinasyon Ajansı Başkanlığı (TİKA).
- Kalın, İ. (2018, June 2). What does Turkey want in the Balkans? *Daily Sabah*. <https://www.dailysabah.com/columns/ibrahim-kalin/2018/06/02/what-does-turkey-want-in-thebalkans>
- Karpat, K. (2016). Balkanlar'da İslâm [Islam in the Balkans]. In M. S. Kafkasyalı (Ed.), *Balkanlarda İslâm: Cilt 5* (pp. 93–128). Türk İşbirliği ve Koordinasyon Ajansı Başkanlığı (TİKA).
- Kopystens'kyj, Z. (1987). *Palinodija*. In O. Pritsak & B. Struminsky (Eds.), *Lev Krevza's Obrona iedności cerkiewney and Zaxarija Kopystens'kyj's Palinodija* (Harvard Library of Early Ukrainian Literature: Texts, Vol. 3). Ukrainian Research Institute of Harvard University. (Original work written 1619–1621).
- Kravanja, B. (2008). Ambiguous perceptions of Christianity, Islam and Bektashism in Macedonia and in the Balkans [Ambiguous perceptions of Christianity, Islam

- and Bektashism in Macedonia and in the Balkans]. In J. Repič, A. Bartulović, & K. Sajovec Altshul (Eds.), *MESS and RAMSES II: Vol. 7. Mediterranean Ethnological Summer School* (pp. 77–99). Znanstvena založba Filozofske fakultete.
- Kryegjyshata Botërore Bektashiane. (n.d.). *Kryegjyshata Botërore Bektashiane* [World Bektashi Headquarters]. Retrieved March 17, 2025, from <https://kryegjyshataboterorebektashiane.org>.
- Kulturno-izobraževalni zavod Averroes. (n.d.). *Kulturno-izobraževalni zavod Averroes* [Averroes Cultural and Educational Institute]. Retrieved March 17, 2025, from <https://www.averroes.si>.
- Law on Freedom of Religion and the Legal Status of Churches and Religious Communities in Bosnia and Herzegovina. (2004). *Official Gazette of Bosnia and Herzegovina*, No. 5/04.
- Lopašić, A. (1994). Islamization of the Balkans with special reference to Bosnia. *Journal of Islamic Studies*, 5(2), 163–186.
- Mango, A. (2002). *Atatürk: The biography of the founder of modern Turkey*. Overlook Press.
- McLoughlin, S., & Cesari, J. (Eds.). (2005). *European muslims and the secular state* (1st ed.). Routledge. <https://doi.org/10.4324/9781315255927>
- Mélikoff, I. (1992). *Sur les traces du soufisme turc, recherches sur l'Islam populaire en Anatolie*. Isis.
- Merdjanova, I. (2013). *Rediscovering the Umma: Muslims in the Balkans between nationalism and transnationalism*. Oxford University Press.
- Mishkova, D. (2025). Legacy, tradition, heritage and the history writing in the Balkans. In D. Mishkova & R. Daskalov (Eds.), *Balkan historiographical wars: Vol. 1. The Middle Ages* (pp. 1–50). Palgrave Macmillan. https://doi.org/10.1007/978-3-031-90113-3_1
- Muslim Forum of Albania. (n.d.). *Muslim Forum of Albania*. Retrieved March 17, 2025, from <https://forumimusliman.org/english>.
- Mustafa, M. (2008). *Giving Ottoman otherness a local flavour: The Bektashi Order of Dervishes in contemporary Albania*. ÖAW Arbeitspapiere zur Sozialanthropologie. https://epub.oeaw.ac.at/0xc1aa5572_0x001c98f7.pdf
- Norris, H. T. (2006). *Popular Sufism in Eastern Europe: Sufi brotherhoods and the dialogue with Christianity and 'heterodoxy'*. Routledge.
- Ocak, A. Y. (Ed.). (2005). *Osmanlı toplumunda tasavvuf ve sufiler: Kaynaklar, doktrin, ayin ve erkan, tarikatlar, edebiyat, mimari, güzel sanatlar, modernizm* [Sufism and Sufis in Ottoman society: Sources, doctrine, ritual and principles, orders, literature, architecture, fine arts, modernism]. Türk Tarih Kurumu Yayınları.
- Öktem, K. (2011). Between emigration, de-Islamization and the nation-state: Muslim communities in the Balkans today. *Southeast European and Black Sea Studies*, 11(2), 155–171. <https://doi.org/10.1080/14683857.2011.587249>
- Religious belief and minorities/ Census reveals surprising figures, 99.4% with Albanian nationality, how many declared themselves Greek, Macedonian

- minority “disappears”. 1.1 million Muslims, more Catholics than Orthodox, (2024), <https://www.balkanweb.com/en/From-religious-belief-to-nationality--the-census-reveals-surprising-figures--how-many-Greeks-declared-themselves-as-minorities--the-Macedonian-minority-disappears/#gsc.tab=0>
- Rosenplüt, H. (1865). Von den Türken. In R. von Liliencron (Ed.), *Die historischen Volkslieder der Deutschen vom 13. bis 16. Jahrhundert* (Vol. 1, pp. 503–512). F. C. W. Vogel. (Original work composed ca. 1458/1459).
- Sancaktar, C. (2019). Balkanlar’da Türk ve Müslüman Milletler: 19. Yüzyıldan Günümüze Milliyetçiliğe Karşı Varoluş Mücadelesi. *Balkan and Near Eastern Journal of Social Sciences*, 5(1), 1–21.
- Skendi, S. (1967). *The Albanian National Awakening, 1878–1912*. Princeton, New Jersey: Princeton University Press.
- Slovenska muslimanska skupnost. (n.d.). *Slovenska muslimanska skupnost* [Muslim Community of Slovenia]. Retrieved March 17, 2025, from <https://www.smskupnost.si>.
- Şener, B. (2019). The main structural factors that make the Balkans important for Turkish foreign policy. *Codrul Cosminului*, 25(2), 369–388. <https://doi.org/10.4316/CC.2019.02.007>
- The Islamic Community – Sentinel and Principles*. (2012, May 29). Islamic Community in Bosnia and Herzegovina. <https://english.islamskazajednica.ba/the-islamic-community/modules-menu/the-islamic-community-sentinel-and-principles>
- Türkiye Cumhuriyeti Dışişleri Bakanlığı. (2020). *Yurtdışındaki Türk kültür varlığı* [Turkish cultural heritage abroad]. <https://www.mfa.gov.tr/yurtdisindaki-turk-kultur-varligi.tr.mfa>
- Vale, G. (2021, September 13). *Census in Croatia: Certification of the population decline*. Osservatorio Balcani Caucaso Transeuropa. https://www.balcanicaucaso.org/en/cp_article/census-in-croatia-certification-of-the-population-decline.
- Vermeulen, T., & Van den Akker, R. (2010). Notes on Metamodernism, *Journal of Aesthetics & Culture*, 2(1), 1–14. <https://doi.org/10.3402/jac.v2i0.5677>
- Von Hutten, U. (1862). *Opera quae reperiri potuerunt omnia*. Teubner.
- Yunus Emre Enstitüsü. (2019, October 18). Saraybosna Yunus Emre Enstitüsü 10. yılını kutluyor [Sarajevo Yunus Emre Institute Celebrates its 10th Anniversary]. <https://www.yee.org.tr/tr/haber/saraybosna-yunus-emre-enstitusu10uncu-yilini-kutluyor>
- Zalta, A. (2016). Socio-cultural impact of Turkey on Bosnia and Herzegovina. In M. S. Kafkasyalı (Ed.), *Balkanlarda İslâm: Cilt 5* (pp. 77–94). Türk İşbirliği ve Koordinasyon Ajansı Başkanlığı (TİKA).

POVZETEK

FENOMEN »BALKANSKEGA ISLAMA« KOT DEJAVNIK MEDKULTURNEGA IN ETNIČNO-SOCIALNEGA DIALOGA

Nina Bilokopytova, Karim El Guessab, Volodymyr Bilokopytov

Avtorji v prispevku obravnavajo pojav »balkanskega islama« kot dejavnik medkulturnega in etnično-socialnega dialoga v kontekstu zgodovinskih migracijskih procesov in koncepta transnacionalnih sprememb. Prizadevajo si za kritično rekonceptualizacijo tega pojma, o katerem zaradi notranje raznolikosti muslimanskih skupnosti na tem območju v strokovni literaturi še vedno potekajo razprave. Avtorji »balkanskega islama« ne obravnavajo kot homogeno ali omejeno celoto, temveč kot analitični konstrukt, ki označuje zgodovinsko vzpostavljeno in kontekstualno pogojeno konfiguracijo verskih praks, institucionalnih oblik in identitetnih narativov, ki se vzpostavljajo na stičišču lokalnih, imperialnih in transnacionalnih vplivov. V metodološkem smislu raziskava temelji na interpretativnem in transnacionalnem pristopu s kombinacijo hermenevitične analize, družbenozgodovinske rekonstrukcije in primerjalne študije primerov. Analizo dopolnjuje še metamoderna perspektiva, ki izpostavlja soobstoj in prepletanje različnih načinov pripadnosti: tradicije in modernosti, lokalnosti in globalnosti, ki so razumljene kot konstitutivne značilnosti balkanske islamske izkušnje.

Študija kaže, da so na vzpostavljanje islamskih identitet na Balkanu bistveno vplivali zaporedni vali migracij, imperialno upravljanje ter postimperialne spremembe. V tem smislu »balkanski islam« odraža medsebojni vpliv več civilizacijskih in etnično-kulturnih plasti, vključno z osmansko institucionalno dediščino, islamskimi tradicijami, slovanskimi etnolingvističnimi formacijami ter širšimi sredozemskimi in srednjeevropskimi vplivi. Takšen preplet je vplival na nastanek kompleksnega družbeno-kulturnega mozaika, o katerem v relevantni literaturi potekajo živahne razprave, zlasti v študijah, ki obravnavajo dolgoročni vpliv osmanske vladavine in njeno reinterpretacijo v sodobnih nacionalnih kontekstih.

Avtorji posebno pozornost namenjajo vlogi migracij kot strukturnega dejavnika pri razširjenosti, institucionalizaciji in notranji diferenciaciji muslimanskih skupnosti. V postosmanskem in postsocialističnem obdobju so se te zgodovinsko ukoreninjene konfiguracije dodatno spreminjale skozi transnacionalne dinamike, vključno z vplivom zunanjih akterjev, kot sta Turčija in zalivske države, ter s širitvijo gospodarskih, kulturnih in verskih omrežij.

Ugotovitve kažejo, da »balkanski islam«, razumljen v tem analitičnem smislu, nima le funkcije označevalca verske identitete, temveč tudi mediacijskega okvira, ki omogoča interakcijo prek etničnih, kulturnih in političnih meja. Predstavlja translokalni družbeni prostor, v katerem se nenehno vzpostavljajo različne oblike pripadnosti. Članek izpostavlja, da lahko verske formacije, če jih obravnavamo kot fluidne in relacijske konstrukte, služijo kot ključna prizorišča medkulturnega dialoga

v zgodovinsko pluralnih in nenehno spreminjajočih se regijah, s čimer prispeva k razpravam na področjih študij migracij in sociologije religije.

PHYSICIAN EMIGRATION AND GLOBALIZATION: A MARKET LOGIC AND POLITICAL ECONOMY PERSPECTIVE

Taqiyeddine Benfifi,^I Naima Outaleb^{II}

COBISS: 1.02

ABSTRACT

Physician Emigration and Globalization: A Market Logic and Political Economy Perspective

This paper discusses the integration of the health-care sector into the globalized economy through the liberalization of trade in medical services. Governments and companies are increasingly hiring physicians from global labor markets, leading to the widespread mobility of physicians from many low- and middle-income countries to high-income countries. This mass movement of physicians, prompted by the global political economy, has hindered low- and middle-income countries' ability to attract and retain domestically trained medical professionals, raising concerns about the effects of this emigration on public health in countries of origin.

KEYWORDS: labor markets, health care, globalization, physician emigration, political economy

IZVLEČEK

Izseljevanje zdravnikov in globalizacija: perspektiva tržne logike in politične ekonomije

Avtorja v prispevku obravnavata integracijo zdravstvenega sektorja v globalizirano gospodarstvo z liberalizacijo trgovine z zdravstvenimi storitvami. Vlade in podjetja na svetovnih trgih dela vse bolj povprašujejo po zdravnikih, kar povzroča vse pogostejše selitve zdravnikov iz številnih držav z nizkimi in srednjimi dohodki v države z visokimi dohodki. To množično odhajanje zdravnikov kot posledica svetovne politične ekonomije državam v razvoju preprečuje, da bi privabile in zadržale svoje zdravniške kadre, kar vzbuja skrbi glede učinkov te emigracije na javno zdravje v državah izvora.

KLJUČNE BESEDE: trgi dela, zdravstveno varstvo, globalizacija, izseljevanje zdravnikov, politična ekonomija

^I PhD in sociology of health; University of Tipaza Morsli Abdellah, Department of Social Sciences, Laboratory of Studies in Culture, Personality, and Development, Tipaza; benfifi.taqieddine@univ-tipaza.dz; ORCID <https://orcid.org/0009-0005-7119-2817>

^{II} PhD in science in demography; University of Bouira Akli Mohand Oulhadj, Department of Sociology, Bouira; n.outaleb@univ-bouira.dz; ORCID <https://orcid.org/0009-0002-8977-7504>

INTRODUCTION

Conventional discourse on the migration of physicians is a recurring theme within the broader context of international migration, encompassing the movement of physicians from low- and middle-income countries (LMICs) to high-income countries (HICs). LMICs are those countries with a GNI per capita, calculated using the World Bank Atlas method, of \$1,135 or less in 2024; lower middle-income economies are those with a GNI per capita between \$1,136 and \$4,495; high-income economies are those with a GNI per capita of more than \$13,935 (World Bank, 2025).

Since physician emigration is a known contributor to poor health systems in low-income countries, it poses a significant danger to achieving the health-related Millennium Development Goals (IOM, 2005). Physician emigration has been identified as a social phenomenon, with its occurrence being linked to the historical, political, and economic context in which it transpires. In this regard, globalization poses a significant challenge to health policies in the twenty-first century. This trend is due to transnational epidemiological effects and migratory impacts on health, as well as the emergence of unhealthy lifestyles (Cabello et al., 2017; Frenk et al., 2011; Pang & Guindon, 2004). These have led to the development of numerous chronic and deadly diseases, which have become important aspects of globalization. The primary challenge in this regard concerns the globalization of the health sector itself, characterized by direct trade in health goods and services, the movement of individuals (patients and professionals), and the emergence of a distinct market within the health field (Smith et al., 2009).

Globalization has facilitated the dissemination of physicians from the developing to the developed world, and even between developed countries, in pursuit of what is often termed “greener pastures” and a satisfactory standard of living (Opoku & Apenteng, 2014; Packer et al., 2007b). The repercussions of the health services trade on the liberalization of general trade, international law, and international institutions raise several questions about the outcomes of the continued physician employment, which reflects a state of competition for this human resource (Benfifi, 2025; Byrne et al., 2021). This challenge represents one of the most significant dangers posed by the globalization of the health market.

In the same context, many health systems have become vulnerable due to the emigration of their health staff, who are a critical human resource for the health sector (Clark et al., 2006). Despite the rising number of medical graduates, many HICs are struggling to meet their health staff requirements. In an effort to address this imbalance, HICs have been compelled to recruit medical professionals from LMICs (Eaton et al., 2023). The services that physicians provide have become products bought and sold in global markets by countries and governments, as well as by private and multinational companies. This has led to the emergence of international organizations such as the World Health Organization (WHO), which seeks to ensure the fundamental right of access to essential health care (WHO, 2010).

This study contends that comprehending physician emigration is intrinsically linked to the functioning of health-care markets and the political economy. Moreover, it underscores that globalization, through its causes and impacts on countries and international collaboration, has emerged as the quintessential feature of international relations, especially between HICs and LMICs.

The present study addresses the following questions: What effects have the global health market and political economy had on the migratory patterns of physicians from LMICs to HICs, and what are the implications for the countries of origin? How has globalization made patterns of physician mobility more complex?

METHOD

The study draws on statistics from the OECD, the WHO, and the World Bank, which provide up-to-date data about the health labor market. These data sources were chosen due to their reliability and consistency. We reviewed the published literature in the Scopus, Web of Science, PubMed, and JSTOR databases using the following keywords: "Health labor market," "physician emigration," "globalization," and "political economy of health".

The inclusion criteria are studies that focus on physician emigration and have a direct link with LMICs and HICs, and studies that highlight the nexus between globalization, political economy of health, and demand and supply, and physician emigration. The exclusion criteria were studies and technical reports about medical training and technical studies unrelated to health policies.

CONCEPTUAL AND THEORETICAL FRAMEWORK

The concept of globalization

The concept of globalization emerged in sociological literature in the late 1980s (Dollar, 2005). It refers to "the compression of the world and the intensification of consciousness of the world as a whole" (Robertson, 1992, p. 8). According to Giddens (1990), globalization is "the intensification of social relations across the globe that connect distant regions so that local events are shaped by events occurring many miles away and vice versa" (p. 64), thereby changing all aspects of our daily lives. Tomlinson (1999) defines globalization as a "complex communication" process because it "refers to the rapidly evolving and intense web of interconnectedness and interdependence that characterizes modern social life" (p. 2).

Therefore, globalization refers to three fundamental elements: First, internationalization, which characterizes the increase in cross-border economic transactions, affecting trade flows, capital mobility, and human movement. Second: technological

power, Globalization would not have gained such momentum without the ease of movement between countries, thanks to rapid technological advancements and new communication technologies. Third: liberalism, which is based on free markets and the integration of weaker countries into the global economic system.

These three elements work together to greatly facilitate the movement of physicians from LMICs to HICs. Bilateral and multilateral agreements between countries on interdependence, which have grown significantly in recent decades, have facilitated this mobility. The availability of transportation, information, shorter distances, and the internet have also been crucial factors in the ease with which physicians emigrate from developing to developed countries. Furthermore, the liberalization of the international economy has facilitated the development of new patterns of economic activity that extend beyond the movement of goods to include the movement of services provided by migrating physicians.

Physician migration: market-based perspective

The notion of the international labor market signifies a substantial shift in the dimensions and confines of labor markets, transcending geographical boundaries and the traditional nation-state framework. Mooney & Evans (2007) have argued, “The global labor market is predicated on the assumption and promotion of the mobility of workers on a global scale” (p. 109). The labor market is a multifaceted system of social and economic interactions that is ever evolving. Therefore, it is essential to analyze and regulate this system to account for the specificities of the context in which it operates and to ascertain the future of work (Ključnikov et al., 2023). The term “market” is generally understood to denote a scenario in which buyers (i.e., consumers) and sellers (i.e., producers) engage in direct or indirect interactions to facilitate the exchange of goods and services. In such a scenario, the forces of supply and demand interact to determine the prices of the goods and services being exchanged (Mwachofi & Al-Assaf, 2011).

The labor market is defined as “the aggregate supply and demand for labor” (Kotlia, 1998, p. 53). The concept under discussion encompasses two fundamental dimensions: supply and demand. The supply and demand model elucidates the determination of the price of a good or service (over a given period) in a perfectly competitive market. The market comprises a group of buyers and sellers interested in trading identical units of a particular good (Sepulveda, 2020) at a price that determines its value, which can increase or decrease. In this paper, the commodity is physicians and the services they provide in the destination country, namely health care, and the price is the fee, bonus, and allowance the physicians receive for their services.

The labor market in the health sector is a dynamic system comprising two distinct yet closely interconnected economic forces: the supply of health-care workers and the demand for them, whose employment is shaped by state institutions and

regulatory frameworks (McPake et al., 2013). Governments and the private sector determine the demand for health-care workers in a given country, while international actors—such as donors and multinational corporations—decide how much they are willing to pay for their employment. The “willingness to pay” depends on the level of health-care funding, just as the “desire to employ” health-care workers depends on the financial resources available to do so. Willingness to pay distinguishes demand from “need.” There is often a mismatch between the financial resources available—and thus the willingness to pay—to employ health-care workers and the number of workers needed to meet the population’s health-care needs (McPake et al., 2013).

Wage levels, as well as other economic, social, technological, legal, demographic, and political factors, influence the supply of health-care workers. Two critical considerations regarding wages arise in health labor markets: market failures and wage-setting processes in the public sector imply that wages cannot be assumed to reflect productivity measures or to be value-based on demand or need for health-care professionals. Furthermore, wage rigidity tends to be greater in the public sector than in the private sector (McPake et al., 2013). It is suggested that these two considerations may be responsible for a series of phenomena within the health labor market, including the international migration of physicians and the shortage of health workers.

As with any other labor market, the health labor market consists of buyers and sellers of health workers. The behavioral characteristics of these buyers and sellers shape their responses to changes in economic incentives and the institutional environment, thus determining the demand and supply of labor (Araujo & Dussault, 2017). The key variables of interest are demand and supply rates and wages (prices), which regulate both supply and demand. Demand is defined as the number of hours that health workers (government, private sector, and international actors, including donors and multinational corporations) are willing to hire and that physicians are willing to work. The demand for health workers is derived from the demand for health services; ultimately, the funding available for health care determines the demand for health workers. Supply is defined not only as the total number of hours that health workers are willing to provide (Araujo & Dussault, 2017) but also the competence and experience of physicians in medical care.

In a well-functioning market, the interaction between the forces of demand and supply—for example, between buyers and sellers of labor—determines labor market outcomes, such as employment rates and the geographical and sectoral distribution of labor. The fundamental premise of this theory is that the wage rate aligns with the interests of both buyers and sellers, thereby facilitating the attainment of equilibrium in the labor market. Due to significantly lower physician salaries in many countries than in the United States, even compensation considered moderate by US standards in rural or underserved regions may appear appealing to International Medical Graduates (IMGs) (Braga et al., 2024).

In essence, this theoretical framework posits that the market reaches a state of “market clearing,” signifying that the quantity of labor supplied corresponds with the quantity of labor demanded at a specific wage rate. An increase in demand for health services raises the willingness to pay for health workers. It also increases labor market demand, which in turn affects future labor allocation, as more people become health professionals. If the market fails to clear, there is a shortage or surplus (unemployment) of labor (McPake et al., 2015).

Health labor markets are characterized by persistent imbalances. As a result, virtually every health-care system worldwide is struggling to produce and retain the medical human resources it needs with the appropriate numbers and skills. The main reason is that wage rates fail to reflect consumers’ valuation of health-care professionals. Consequently, health worker hiring decisions are rarely linked to changes in the need for health care. For example, in low-income countries, the majority of households live in poverty and insurance coverage is limited, resulting in a significant gap between the need for qualified health workers and the labor market’s ability to generate sufficient demand for these workers (Araujo & Maeda, 2013).

While the above perspective provides a relative explanation of physician emigration, it still has limitations. Health systems are not regulated by a purely competitive market or the laws of supply and demand. Instead, they are progressively co-created by various players and influenced by local, national, and global causes (Bloom & Standing, 2008), such as health-care professionals, finance, unions, the nature of health systems, public policies, the wage system, employment, insurance companies, service chains, and others. Furthermore, the recruitment of physicians, as stipulated by the code of practice, is subject to ethical standards (WHO, 2010). Besides, there is a nexus between the state, the market, and the international actors. Consequently, the health sector transcends mere economic reasoning. It also entails the establishment of legal regulations and the governance of national and local policies (Koivusalo, 2014). Consequently, physicians cannot be seen only as commodities for exchange, nor can their services be simplified to the tenets of supply and demand. When recipient nations recruit physicians and encourage their relocation, they deprive the originating country of a fundamental component of its health-care system—a cornerstone of its society.

Physician migration: A political economy perspective

The concept of “the political economy of health” is associated with Marxism. It includes a wide range of concepts that have shaped the Marxist legacy, such as class, class struggle, exploitation, profit, relations of production, working conditions, global imperialism, and underdevelopment. Political economy is about the relationships among the state, economy, and civil society (Raphael & Bryant, 2006). In this context, Salvador Allende analyzed how high-income countries built and enforced exploitative international economic relationships with impoverished countries,

initially through colonialism and, subsequently, through various forms of corporate, political, and economic neocolonialism (Waitzkin, 2007). Raphael (2015) examined political economics through the lens of political and economic frameworks that distribute resources based on the varying levels of power held by individuals and groups within society. This assumption of inequality in the distribution of power, income, and health applies even between countries; as Krieger (2001) argued: "At issue are priorities of capital accumulation and their enforcement by the state, so that the few can stay rich (or become richer) while the many are poor, whether referring to countries or to classes within a specified country".

This foundation provides a perspective for understanding the inequalities in the distribution of health workers across countries. Internationally, uneven productivity growth has led to significant income disparities, a key factor contributing to more serious health concerns regarding the international distribution of health workers, particularly physicians (Dacuycuy, 2008). Researchers have highlighted how international organizations impose neoliberal policies on developing countries through normative and coercive means (Chorev, 2013). Countries in the global South were promised much-needed assistance in paying off their debts if they signed agreements with the World Bank and the International Monetary Fund. However, these lending arrangements were contingent on changes to market-liberalizing policies. Moreover, under the neoliberal system, structural adjustment policies imposed on LMICs have widened the wage gap between LMICs and HICs. Governments have advocated privatization, commodification, deregulation, and austerity measures, with serious repercussions for access to, equity in, and the quality of care. The reliance of LMICs on neoliberalism has led to the emergence of inequality and an unequal distribution of wealth between countries and to a shift from traditional colonialism to neocolonialism, in which countries of the North exploit countries of the South through political, economic, and legal means. While LMICs have little negotiating power, HICs set the guidelines for hiring practices, immigration requirements, and credential recognition.

These policies in LMICs have weakened their ability to retain physicians. Due to low income, limited employment opportunities, and poor working conditions, coupled with the recruitment programs pursued by HICs, physicians emigrate in search of better employment opportunities and working conditions. These are called pull factors in the migration literature. These elements provide a somewhat symmetrical image of the comparable salaries, career opportunities, working conditions, and environments found in the source and destination countries. Destination countries will be appealing where a substantial gap (or perceived gap) exists. However, factors such as concerns about one's own safety in conflict areas and unstable economies can also be significant factors in certain countries at certain times. Supplementary pull incentives, such as the prospect of travel or participation in relief initiatives, could be highly effective (Buchan & Perfilieva, 2006).

Historically, physicians have frequently emigrated to countries with which they share historical connections. For instance, Algerian physicians favor emigrating to France (Benfifi & Outaleb, 2024), whereas Indian, Pakistani, and Nigerian physicians favor emigrating to the UK (Daniel et al., 2023; Saleem et al., 2021; Trewby, 2017). This trend signifies the perpetuation of colonial connections. Physicians emigrate to these countries mostly because of linguistic proximity, as they are proficient in the colonizers' language owing to their medical education conducted in that language; this factor significantly influences their choice of destination countries.

GLOBAL TRENDS AND IMPACTS OF PHYSICIAN MIGRATION

Recently, the movement of physicians between countries has been greatly facilitated by the ever-increasing demand for HICs and the global environment, driven by the liberalization of trade in health services and the globalization of the health market. Besides, HICs' reliance on foreign labor was a result of the high costs of physician training under neoliberal policies. This trend has led many to hypothesize that Mode (4) of the General Agreement on Trade in Services (GATS) (which deals with the movement of natural persons) could lead to massive imbalances in human resources for health (Nielson & Taglioni, 2003). It has been argued that the architects of the GATS made highly dangerous assumptions, although these findings may not be reflected in the agreement itself. These assumptions pertain to the gradual distancing of governments from the provision, management, or intervention of services, even for fundamental needs such as water, health, and education (Kinuthia, 2002).

The international migration of health workers has long been a matter of concern for state health policy. However, with the privatization and commodification of health services, health worker migration is increasingly regulated through universal service mechanisms (Collyer & White, 2011), which can be viewed as commodities shaped and exported by state and private capitalist interests. Clark et al. (2006) point out two ways in which physician emigration occurs:

The first: through permanent recruitment by employers or agencies. HICs increasingly use this approach to recruit staff into their health-care systems. The second is more passive. One example is the National Health Service's use of relatively new communication technologies to provide potential migrants with the information they need to decide both to migrate and to actually embark on it. These technologies include websites and email, which have increased awareness among health-care workers of opportunities available in developed countries. Such strategies are considered negative because they recruit health-care professionals into national health service systems without direct personal contact. This scenario is exactly where globalization's role in enabling physician mobility becomes evident.

During the COVID-19 pandemic, hiring rates increased significantly due to the urgent need to address physician and other health-care professional shortages. Undoubtedly, the pandemic exacerbated existing inequalities and generated new injustices (Pardo, 2020), profoundly affecting the evolving health-care landscape (Dew, 2012). Since the onset of the pandemic, countries within the Organization for Economic Co-operation and Development (OECD) have expanded the recruitment of foreign health-care workers from low- and middle-income countries. In 2020, the OECD warned that:

“While international recruitment of foreign health-care workers is a quick fix to address workforce shortages in some countries during the COVID-19 crisis, it cannot be regarded as an effective or equitable solution. First, it does not address the structural imbalances between supply and demand for health-care professionals. Moreover, due to the global nature of the pandemic, it deprives sending countries—often characterized by weak health systems—of health-care workers at a time when they face a major health crisis” (OECD, 2020, p. 8)

HICs employ large numbers of physicians despite significant imbalances in the availability of this human resource and disease burden. Data on the number of physicians per capita indicate that among HICs, Norway has the highest physician density, with 44 physicians per 10,000 population in 2015. Japan employed 24 physicians per 10,000, while the United States employed 26 physicians per 10,000 in the same year (OECD, 2017). Across all OECD countries, the average was 34 physicians per 10,000 population (OECD, 2017). According to Table 1, the primary health sector attracts migrants in the United Kingdom, Australia, Norway, and the United States, as indicated by statistics for 2022 and 2023 published by the Organization for Economic Co-operation and Development (OECD, 2024b). International migration indicators have reached record highs in OECD countries since the COVID-19 pandemic, exceeding 6.5 million new migrants in 2023 and reaching well over 150 million people born outside OECD countries and settled there (OECD, 2024b).

OECD	Foreign-born population	Labor migration rates (%)	Health sector (%)	Net migration rates (%)	Natural growth rates (%)	Population growth rates (%)
United Kingdom	15.4%	39%	16.50%	7.2%	0.2%	7.4%
	10.4 million					
Australia	31%	24%	14.80%	20.8%	3.9%	24.7%
	8.2 million					
Norway	17.5%	13%	13.70%	9.6%	1.5%	11.1%
	1 million					
United States	14.5%	14%	12.30%	3.4%	1.5%	4.9%
	49.1 million					

Table 1: The distribution of OECD countries receiving migrants by health sector (greater than 10%) between 2022 and 2023 (source: OECD, 2024b).

Emigration plays an active role in fueling the health market, especially in HICs such as the United Kingdom, Australia, Norway, and the United States. It also contributes to the labor market as a whole, with migrant workers accounting for between 10% and more than 30% of the workforce. In addition, migration has become a pillar of population growth, if not its source, especially in countries that still record natural growth rates of no more than 1.5%, except for Australia, which records a natural growth rate of over 3.5% and a net migration rate of over 20%. There are currently 78,823 physicians registered in the UK Medical Register who were trained in 57 of the world’s poorest countries. Table 2 illustrates this (Eaton et al., 2023):

2017	May 2021	December 2021
50,000 (25%)	97,662	112,024

Table 2: Number of physicians employed in the UK who were trained in low- and middle-income countries (source: Eaton et al., 2023).

In a complex global health system, the asymmetry of power relations between source and destination countries is readily apparent. Ineffective health-care environments that lack the fundamental requirements for keeping physicians and guaranteeing their professional recognition are the result of structural institutional issues, such as poor governance, inadequate funding, and dwindling regulatory capacity. Additionally, underinvestment in medical resources due to state weakness under neoliberal austerity and restructuring programs has made high-income countries the preferred destination for physicians from vulnerable and low-income countries.

In 2022, more than 2.4 million work permits were issued, and in 2023, approximately 2.1 million study permits were issued for students (OECD, 2024b). These statistics demonstrate the vitality and activity of labor markets in OECD countries, most of which are classified as developed. Some countries suffer from low, even negative, natural growth rates, aging populations, population retirements, and a general shortage of skilled labor, particularly in the health-care sector.

The demand for skilled and specialized labor, particularly in the health-care sector, has become a fundamental requirement for these countries. Although they impose restrictions on immigration, their need for health-care professionals forces them to consider the market logic of supply and demand, balancing their constraints and needs. This is due to their low natural growth rates, which directly affect their future labor supply and the care they provide to their elderly, both now and in the future. This keeps them competitive in attracting skilled labor and migrant students (OECD, 2024b). The health sector continues to attract migrants in OECD countries, although in many cases it ranks behind other sectors, such as trade, industry, energy, education, administration, and accommodation and food services (OECD, 2024b).

There is both internal competition among sectors and national interests within each country, as well as external competition between countries to attract health-care professionals to their sectors. In Denmark, the health-care sector accounts for over 20% of immigrants, ranking second only to the trade sector. Denmark exhibited a negative natural growth rate of -0.2% , indicative of a substantial decline in fertility rates and births, and an increase in mortality due to aging.

Finland reported a similar situation with a natural growth rate of -3.2% in 2023. However, the country's population increase was supported by a net migration rate of more than 10%. Concurrently, labor migration constitutes 32% in Finland, with the health-care sector ranking third in attracting migrants—after the industrial and administrative sectors—at 11%. Sweden shows a low positive natural growth rate of 0.5% and a net migration rate not exceeding 2.5%. Labor migration accounts for 20%, with migration to the health-care sector exceeding 12.5%. Additionally, 20% of Sweden's population is foreign-born. Ireland is the most attractive labor migration market among these countries, with over 50% recorded in 2023. The health-care sector ranked fourth, attracting 10% of migrants.

The main reason for these rates may be that these countries prioritize other sectors, such as industry and administration, or limit funding for recruiting medical

professionals, making them less competitive than other countries. Alternatively, they might be self-sufficient, with imports of professionals adequately meeting health-care sector needs. The latter assumption is unlikely given the very low or negative natural growth rates in these countries, which suggest a future workforce shortage and significant demographic changes. This situation will open competitive labor markets despite immigration restrictions and prompt these countries to re-order their priorities regarding the demand for migrating medical professionals.

Table 3 demonstrates that the health sector is not a strong competitor with other sectors in the labor market in these countries, as it does not hold a leading position, and its worker recruitment rates fluctuate between 7% and 9%.

OECD	Foreign-born population	Labor migration rates	Health sector (%)	Net migration rates (%)	Natural growth rates (%)	Population growth rates (%)
Netherlands	15.8%	16%	9.10%	7.6%	-0.3%	7.3%
	2.8 million					
France	13.8%	20%	8.30%	2.7%	0.7%	3.4%
	8.9 million					
Belgium	19%	6%	8%	7.6%	00%	7.6%
	2.2 million					
Slovakia	3.9%	78%	7.70%	0.3%	-1%	-0.8%
	0.2 million					
Germany	18.2%	14%	7%	8%	-4%	4%
	15.2 million					
Switzerland	31.2%	2%	7%	15.4%	0.9%	16.3%
	2.7 million					

Table 3: Distribution of OECD countries receiving migrants by health sector (from 6% to less than 10%) between 2022 and 2023 (source: compiled by the authors based on OECD, 2024b).

France alone recruited 30,961 physicians who obtained their medical degrees abroad, according to the National Medical Council's 2024 statistics, with most coming from non-European Union countries. The three Maghreb countries—Algeria (36.7%), Tunisia (13%), and Morocco (7%)—supplied France with medical professionals, accounting for 56.7% of the total number of emigrant physicians (Zehnati, 2024).

An overview of the evolution of the percentage of physicians who obtained their degrees outside the receiving countries (see Table 4) reveals that demand for physicians has doubled in all OECD countries except Finland, where demand has halved over the past twenty years.

As for the remaining European countries mentioned in the table, demand for medical expertise has tripled, with physicians who obtained their degrees outside the receiving countries accounting for more than a third of the total number of physicians in 2020, according to OECD statistics.

OECD receiving countries	2000	2010	2015	2020
Germany	4%	7%	10%	14%
Australia	/	/	36%	35%
Belgium	4%	8%	11%	13%
Canada	21%	23%	25%	26%
Denmark	4%	9%	9%	10%
United States	/	25%	25%	/
Finland	34%	23%	19%	16%
France	4%	8%	11%	12%
Ireland	/	/	39%	40%
Norway	/	36%	39%	43%
New Zealand	38%	44%	42%	42%
United Kingdom	/	33%	34%	36%
Sweden	14%	24%	34%	33%
Switzerland	/	24%	32%	37%

Table 4: The evolution of the proportion of physicians who obtained their degrees outside the receiving countries (2000–2020) in receiving OECD Countries (source: compiled by the authors based on OECD, 2024a).

The United Kingdom, the United States, Canada, New Zealand, Norway, and Australia have maintained similar proportions of medical professionals with qualifications from other countries. This may be due to their reliance on carefully selected immigration, which controls the health labor market, and their strategies for regulating their health sector (demanding medical professionals according to their needs).

Overall, Asian countries (India, China, and Pakistan) are the largest suppliers of migrant physicians and nurses worldwide, but there is also increasing movement between OECD countries, mainly due to growing flows within the European Economic Area, particularly from Eastern Europe (OECD, 2024b). However, small island countries continue to show the highest migration rates (OECD, 2015).

However, if we compare the aforementioned HICs with LMICs in terms of burden of diseases and the availability of health workers, it is estimated that Africa accounts for 13.76% of the global population, yet bears 25% of the global disease burden, while its health-care workforce represents only 1.3% (Packer et al., 2007a), and its share of global health expenditures is less than 1%, leaving more than half of its population without access to essential health services (Chattu et al., 2021). This paradox threatens the health security of these countries. Despite a considerable period of continuing medical education programs, the physician-to-population ratio has been declining since the 1980s. While there was once one physician per 10,000 inhabitants in sub-Saharan Africa, by 2004 this ratio had fallen to 0.2 physicians per 10,000, compared to 24 physicians per 10,000 in the United States and 28 per 10,000 in the UK (Saluja et al., 2020).

This is closely related to the political economy of health theory, which holds that how countries produce and distribute resources significantly impacts population health. An unequal distribution of power among countries and a decline in public health are demonstrated by the training of physicians and the distribution of material and financial resources, which are then exploited by countries that did not invest in their training. As a result, social and economic inequalities and privileges are maintained.

The swift escalation of LMICs' sovereign indebtedness has diverted resources from public health investment. For example, in the first year of the COVID-19 pandemic, out-of-pocket spending in LMICs dropped by about 2%, and it is unlikely to tick up further given the ongoing cost-of-living crisis (Stubbs et al., 2023). This will disproportionately impact the impoverished and most susceptible people, likely exacerbating health disparities within countries. The dismantling of inequities in global health must involve bridging the significant capacity gap between professionals in HICs and LMICs, which resulted from their emigration (Olufadewa et al., 2021).

Previous studies assessing the cost of physician emigration to LMICs relative to the cost of physician education found that educating a physician costs between \$29,898 and \$65,997 (Kirigia et al., 2006; Mills et al., 2011). While Mills et al. (2011) estimated the total "lost investment" in sub-Saharan Africa at approximately \$2.17

billion. Table 5 illustrates the annual cost of physician emigration by WHO region and World Bank income group.

WHO regions	Total annual cost (million US\$)	% of gross national income	Cost per physician per year (thousand US\$)
Africa	6,425 (1,572 to 15,414)	0.370% (0.091% to 0.888%)	293 (71 to 740)
Americas	1,079 (216 to 2,631)	0.020% (0.004% to 0.050%)	30 (6 to 78)
Eastern Mediterranean	3,468 (610 to 8,490)	0.205% (0.036% to 0.503%)	76 (13 to 194)
Europe	434 (75 to 1,070)	0.013% (0.002% to 0.031%)	10 (2 to 26)
Southeast Asia	3,804 (780 to 9,042)	0.102% (0.021% to 0.243%)	49 (10 to 121)
Western Pacific	645 (132 to 1,598)	0.005% (0.001% to 0.014%)	34 (7 to 86)
WB income groups			
Low income	936 (233 to 2,213)	0.258% (0.064% to 0.609%)	208 (51 to 530)
Lower middle income	10,582 (2,352 to 25,350)	0.181% (0.040% to 0.434%)	82 (18 to 205)
Upper middle income	4,337 (798 to 10,682)	0.020% (0.004% to 0.050%)	41 (7 to 105)
Total	15,855 (3,384 to 38,245)	0.057% (0.012% to 0.138%)	66 (14 to 166)

Table 5: Characteristics of low and middle-income countries, by WHO region and World Bank income group (source: Saluja et al., 2020).

These statistics reflect the cost of medical brain drain to LMICs for each year that the existing emigrant workforce remains abroad. This includes the fact that brain drain is not a one-time capital loss but continues to impact LMICs each year, as their physicians are out of the country. The emigration of physicians transfers tax revenue from the source country to the destination country; it results in the loss of the contribution of employed physicians' earnings to future income and economic growth; and it creates a cooperative disadvantage—in other words, the loss of the positive effects

that a large number of professionals can have on raising the average productivity of their colleagues who choose not to emigrate (Robinson, 2007).

Saluja et al.'s study indicates that LMICs incur an annual loss of around US\$16 billion due to excess mortality costs associated with physician emigration to HICs (Saluja et al., 2020). The predominant portion of this expense, according to the model employed in the study, is attributed to under-five mortality associated with reduced physician density. The financial impact of excess deaths attributed to brain drain, expressed as a percentage of total national GDP, is most pronounced in low-income countries in the African region. Nonetheless, when evaluating the overall cost, it is highest in LMICs, particularly in the Southeast Asian and Eastern Mediterranean regions.

The shortage of physicians in sub-Saharan Africa is a widespread problem, linked to maternal mortality rates 30 to 50 times higher than in wealthy countries. Life expectancy at birth in sub-Saharan Africa is 54 years, roughly 26 years lower than in HICs today (WHO, 2011), and only three years higher than in the United States a century ago (Arias, 2010). Physician emigration constitutes a tremendous shift of wealth from impoverished LMICs to prosperous HICs. Indeed, the financial gains for HICs and the financial losses for LMICs resulting from this brain drain are enormous (Mackintosh et al., 2006; Physicians for Human Rights, 2004).

The shortage of physicians in LMICs has led to the closure of some health facilities, preventing many patients from receiving necessary care (Padarath et al., 2004). This dire situation has also made it difficult to find replacements for physicians who have emigrated. For example, in Mali, the government built 533 health centers; however, by January 2001, only 43% of these remained open. The same is true in Zambia, where access to health care has become extremely limited. For instance, of the more than 600 physicians trained in the country since independence, only 50 remain. Furthermore, in Malawi, inexperienced workers have been sent to work as midwives (USAID, 2003). The Volta Regional Hospital, a new hospital in Ghana, was forced to rely mostly on retired physicians and surgeons, who might not have the most recent medical knowledge (Physicians for Human Rights, 2004). The shortage of physicians may lead to incorrect diagnoses and inappropriate treatment as patients may have to wait a long time before beginning treatment (Awases et al., 2004).

The relationships between the "axis" countries (HICs) and the "periphery" (LMICs), along with the uneven interaction between them, contribute to the differential and inequitable development of the world. A recent study found that while some attempts were made to integrate LMICs into global trade and economy, international organizations could not translate their policy rhetoric into reality (Regmi, 2025). The unified strategy used by multilateral organizations has adversely affected least developed countries due to disparities in production, trade, and economic conditions across countries. Global neoliberal policies have resulted in considerable inequality in the allocation of health-care professionals and have enabled the replacement of democratically elected governments with a governance model in

which market forces, including multinational corporations, financial institutions, and private foundations, significantly diminish state authority in essential policy decisions (Piketty, 2020). For instance, a recent study found that hospitals transitioning from public to private ownership generally achieve higher profits than their public counterparts that remain public, mostly through selective patient admission and workforce reductions. It is also found that overall increases in privatization often correlate with deteriorating patient health outcomes (Goodair & Reeves, 2024). Another piece of evidence is that the proportion of physicians engaged in private health-care delivery, the percentage of health-care expenditures funded publicly, and the per capita private health-care financing were all inversely correlated with the degree of physician expatriation (Loh et al., 2013).

Kurowski et al. (2004) assessed the availability of health workers relative to the needs of the health system in Tanzania and Chad, both LMICs. The study results showed that, first, there is a conspicuous absence of health workers in these countries, with the number of personnel available falling significantly short of the numbers required to deliver essential health services. The researchers estimate that sub-Saharan Africa as a whole faces a shortage of 720,000 physicians and 670,000 nurses. Second, the competencies necessary to provide essential services are either insufficient or set at unreachable levels of excellence. This situation has posed considerable implementation challenges. Third, the production rates of health workers are found to be inadequate compared with the losses sustained by the health system due to mortality, attrition, and increased migration.

While the significance of human resources in health policy has always been recognized, the prevailing driving forces and focal points of discussion have shifted significantly in the past decade. More recently, the issues of brain drain and the impact of globalization on health systems have assumed prominence on the agenda (Frenk & Gómez-Dantés, 2002). The process of globalization has had a significant impact on the capacity of national health-care systems to deliver essential services to their populations. The most significant impact is being felt in the least developed countries, where there has been a considerable increase in migration driven by the globalization of the labor market, alongside push and pull factors and other structural factors. The underfunding and dysfunction of health-care systems in these countries have been identified as a key factor contributing to their inability to compete effectively in the global labor market. The emigration of medical professionals from LMICs has a detrimental effect on the already fragile state of health-care systems, thereby making it even more difficult to retain specialists in this field (Clark et al., 2006). We can compare this phenomenon to a snowball effect, where each successive migration leads to an increasing influx.

Globalization has had a direct impact on national health policy through increased interaction and interdependence between states. For example, the shortage of health workers in low-income countries can be attributed to the active and passive employment of health workers by rich countries (Hagopian et al., 2005).

This, in turn, has led to inequality between LMICs and HICs. Inequality manifests through the social determinants of health, as the conditions in which people live and work are increasingly shaped by global business interests that affect the chances of living an adequate, healthy life (Labonte, 2007). HICs primarily respond to the shortage of health-care professionals by recruiting from LMICs. Health-care workers are increasingly being employed in temporary or permanent jobs abroad. Although some of this movement occurs between HICs, most occurs from LMICs to HICs (Clark et al., 2006).

In response to the consequences of physician emigration, many countries have sought to mitigate and regulate its negative effects through various international, regional, and national mechanisms. Among these tools are the Codes of Practice, which are non-binding. The extent of such statements is analogous to that of a Statement of Intent. In summary, the aforementioned codes do not impose penalties on employers who violate their provisions, nor do they provide any incentive for compliance. These accords do not preclude the recruitment of health personnel from countries identified as experiencing a deficit of such professionals; rather, they pertain exclusively to the organization of recruitment initiatives (OECD, 2004).

Despite the significance of these codes in regulating physician mobility, the lack of penalties or ongoing enforcement mechanisms has allowed emigration to persist. This is particularly evident in the context of provisions offered by host countries (such as Mode 4), which have remained limited to ethical discussions rather than binding obligations, resulting in inadequate implementation by receiving countries.

Conversely, agreements such as the Bilateral Agreements (Memoranda of Understanding), the Agreement of Understanding between the UK and South Africa, and the Agreement of Understanding between Namibia and Kenya regarding Technical Cooperation in Health are treaties established between two countries to govern recruitment protocols. Nonetheless, it is significant that these agreements have not fundamentally changed migratory patterns, since movement continues to be influenced by a combination of macro-structural forces and micro-level factors. Thus, they have failed to tackle the fundamental reasons of migration, instead of alleviating its consequences. Moreover, like the WHO's codes of conduct, these agreements are non-binding and confine themselves to outlining overarching cooperation and ethical concepts. Consequently, they have not participated in reforming, regulating, or devising measures to safeguard nations of origin.

Although discussions continue regarding regulating migration through these agreements, and debates are growing about taxes on brain drain and ethical recruitment, the absence of compensatory mechanisms undermines the possibility of reaching an effective solution that guarantees the rights of countries that have trained their physicians. Furthermore, weak data, a lack of coordination between countries of origin and destination, and the inability to track migration pathways have hindered the implementation of proposed policies. For example, the lack of evaluation in the Agreement of Understanding between Namibia and Kenya on

Technical Cooperation in Health limited its scope and resulted in short-term assessments. While the Southern African Development Community (SADC) was relatively successful, it did not address the structural causes of migration and therefore had little impact.

Regional Agreements have also been developed to remove barriers to the free movement of persons within the SADC (Southern African Development Community, 2005). In contrast to the previously stated instruments, this general migration policy does not explicitly govern the mobility of health-care professionals; it aims, among other things, to examine the legislation and regulations governing their migration. However, it was not ratified by a sufficient number of countries (Vhumbunu et al., 2024).

Furthermore, it appears that HICs possess powerful negotiating tools and mechanisms that put developing countries at a disadvantage. This perpetuates inequality and ignores structural disparities when the same mechanisms and rules are applied to countries with deep development gaps.

CONCLUSION

In response to our questions, migration from LMICs has surged to unprecedented levels, driven primarily by labor-market demand and the need for physicians in HICs. The emigration of physicians has escalated due to international policies focused on free markets and voluntary exchange, which have exacerbated disparities between nations of origin and destination. Furthermore, nations of origin have suffered significant harm due to neoliberal policies, rendering them unable to sufficiently attend to their citizens or fulfill the requirements of their own medical professionals. The emergence of globalization has prompted the integration of the health sector into the global market economy, resulting in the exchange of labor and a significant influx of physicians into high-income countries, thereby driving massive physician emigration. Nevertheless, we must acknowledge that emigrants have agency in shaping their migration decisions, since emigration is not merely a reflection of superstructures or market forces. Therefore, the reasons for emigration differ at the micro level, including personal aspirations, family circumstances, and professional opportunities that vary from one individual to another.

This article seeks to integrate the viewpoints of “the health labor market” and “political economy” to provide a more expansive and thorough understanding of physician emigration within the framework of globalization. Physicians relocate due to a global paradigm that creates incentives for migration from their current location and generates demand in alternative regions, rather than merely seeking increased remuneration. Emigration of physicians is influenced by power dynamics between nations, disparities in health system financing, austerity and restructuring policies, state fragility in LMICs, and the increasing dependence of HICs on foreign talent.

One of the central issues related to the globalization of the health sector is the emigration of physicians and its impacts on source countries, particularly LMICs. LMICs suffer from severe health-care shortages due to ongoing physician recruitment by HICs. The globalization of the health sector, like other economic sectors governed by market forces, poses a threat to the health security of source countries and creates the prospect of increased physician emigration to developed countries. This trend is driven by declining and often negative natural population growth rates, which affect and will continue to affect the health-care labor supply and demographic imbalances characterized by an aging population with growing demands for specialized health care. Additionally, a balance has emerged between domestic competition, between the health sector and other sectors, and international competition to attract medical talent.

RESEARCH DATA ACCESSIBILITY STATEMENT

All data presented can be traced through the bibliography.

REFERENCES

- Araujo, E. C., & Dussault, G. (2017). Dynamics of the health-care labor markets. In S. R. Quah (Ed.), *International Encyclopedia of Public Health (Second Edition)* (pp. 382–386). Academic Press. <https://doi.org/10.1016/B978-0-12-803678-5.00100-4>
- Araujo, E. C., & Maeda, A. (2013). *How to recruit and retain health workers in rural and remote areas in developing countries: A guidance note*. <https://doi.org/10.13140/RG.2.2.34680.55041>
- Arias, E. (2010). United States life tables 2006. *National Vital Statistics Reports*, 58(21):1–40.
- Awases, M., Gbary, A., Nyoni, J., & Chatora, R. (2004). *Migration of health professionals in six countries: A synthesis report*. World Health Organization. Regional Office for Africa. <https://apps.who.int/iris/handle/10665/358240>
- Benfifi, T. (2025). Between “here” and “there”: Toward understanding emigration representations and perceptions among Algerian physicians. *Italian Sociological Review*, 15(1), Article 1. <https://doi.org/10.13136/isr.v15i1.834>
- Benfifi, T., & Outaleb, N. (2024). Exploring the global and Algerian crisis of physicians emigration. *Algerian Review of Security and Development*, 13(2), 01–18.
- Bloom, G., & Standing, H. (2008). Future health systems: Why future? Why now? *Social Science & Medicine*, 66(10), 2067–2075. <https://doi.org/10.1016/j.socscimed.2008.01.032>
- Braga, B., Khanna, G., & Turner, S. (2024). Migration policy and the supply of foreign physicians: Evidence from the Conrad 30 waiver program. *Journal of Economic Behavior & Organization*, 226, 106682. <https://doi.org/10.1016/j.jebo.2024.106682>
- Buchan, J., & Perfilieva, G. (2006). *Health worker migration in the European Region: Country case studies and policy implications* (WHO/EURO:2006-3956-43715-61498). World Health Organization. Regional Office for Europe. <https://apps.who.int/iris/handle/10665/347915>
- Byrne, J.-P., Conway, E., McDermott, A. M., Matthews, A., Prihodova, L., Costello, R. W., & Humphries, N. (2021). How the organisation of medical work shapes the everyday work experiences underpinning doctor migration trends: The case of Irish-trained emigrant doctors in Australia. *Health Policy*, 125(4), 467–473. <https://doi.org/10.1016/j.healthpol.2021.01.002>
- Cabello, M., Miret, M., Caballero, F. F., Chatterji, S., Naidoo, N., Kowal, P., D’Este, C., & Ayuso-Mateos, J. L. (2017). The role of unhealthy lifestyles in the incidence and persistence of depression: A longitudinal general population study in four emerging countries. *Globalization and Health*, 13(1), 18. <https://doi.org/10.1186/s12992-017-0237-5>
- Chattu, V. K., Knight, W. A., Adisesh, A., Yaya, S., Reddy, K. S., Di Ruggiero, E., Aginam, O., Aslanyan, G., Clarke, M., Massoud, M. R., & Jha, A. (2021). Politics of disease control in Africa and the critical role of global health diplomacy: A systematic review. *Health Promotion Perspectives*, 11(1), 20–31. <https://doi.org/10.34172/hpp.2021.04>

- Chorev, N. (2013). Restructuring neoliberalism at the World Health Organization. *Review of International Political Economy*, 20(4), 627–666. <https://doi.org/10.1080/09692290.2012.690774>
- Clark, P. F., Stewart, J. B., & Clark, D. A. (2006). The globalization of the labour market for health-care professionals. *International Labour Review*, 145(1–2), 37–64. <https://doi.org/10.1111/j.1564-913X.2006.tb00009.x>
- Collyer, F., & White, K. (2011). The privatisation of Medicare and the National Health Service, and the global marketisation of healthcare systems. *Health Sociology Review*, 20(3), 238–244. <https://doi.org/10.1080/14461242.2011.11003086>
- Dacuycuy, L. B. (2008). *The migration of health professionals*. (Working Paper No. 7). International Labour Organization. Article 994112253402676. <https://ideas.repec.org/p/ilo/ilowps/994112253402676.html>
- Daniel, F. M., Essien, E. A., Gbuchi, M. A., Ukoaka, B. M., & Emeruwa, V. E. (2023). Mitigating physician emigration in Nigeria by improving the internship experience. *International Journal of Medical Students*, 11(4), 343–346. <https://doi.org/10.5195/ijms.2023.2255>
- Dew, K. (2012). *The cult and science of public health: A sociological investigation*. Berghahn Books.
- Dollar, D. (2005). Globalization, poverty, and inequality since 1980. *The World Bank Research Observer*, 20(2), 145–175.
- Eaton, J., Baingana, F., Abdulaziz, M., Obindo, T., Skuse, D., & Jenkins, R. (2023). The negative impact of global health worker migration, and how it can be addressed. *Public Health*, 225, 254–257. <https://doi.org/10.1016/j.puhe.2023.09.014>
- Frenk, J., & Gómez-Dantés, O. (2002). Globalisation and the challenges to health systems. *BMJ: British Medical Journal*, 325(7355), 95–97.
- Frenk, J., Gómez-Dantés, O., & Knaul, F. M. (2011). Globalization and infectious diseases. *Infectious Disease Clinics of North America*, 25(3), 593–599. <https://doi.org/10.1016/j.idc.2011.05.003>
- Giddens, A. (1990). *The consequences of modernity*. Polity Press.
- Goodair, B., & Reeves, A. (2024). The effect of health-care privatisation on the quality of care. *The Lancet Public Health*, 9(3), e199–e206. [https://doi.org/10.1016/S2468-2667\(24\)00003-3](https://doi.org/10.1016/S2468-2667(24)00003-3)
- Hagopian, A., Ofosu, A., Fatusi, A., Biritwum, R., Essel, A., Gary Hart, L., & Watts, C. (2005). The flight of physicians from West Africa: Views of African physicians and implications for policy. *Social Science & Medicine*, 61(8), 1750–1760. <https://doi.org/10.1016/j.socscimed.2005.03.027>
- IOM. (2005). *The millennium development goals and migration* (No. 20). International Organization for Migration.
- Kinuthia, J. (2002). *Trading in healthcare services in Kenya, are we prepared?* WEMOS and SOMO.

- Kirigia, J. M., Gbary, A. R., Nyoni, J., Seddoh, A., & Muthuri, L. K. (2006). The cost of health-related brain drain to the WHO African Region. *African Journal of Health Sciences*, 13(3), Article 3. <https://doi.org/10.4314/ajhs.v13i3.30830>
- Ključnikov, A., Popkova, E. G., & Sergi, B. S. (2023). Global labour markets and workplaces in the age of intelligent machines. *Journal of Innovation & Knowledge*, 8(4), 100407. <https://doi.org/10.1016/j.jik.2023.100407>
- Koivusalo, M. (2014). Policy space for health and trade and investment agreements. *Health Promotion International*, 29(suppl 1), i29–i47. <https://doi.org/10.1093/heapro/dau033>
- Kotlia, A. (1998). The concept of the labor market. *Problems of Economic Transition*, 41(3), 53–65. <https://www.tandfonline.com/doi/abs/10.2753/PET1061-1991410353>
- Krieger, N. (2001). Theories for social epidemiology in the 21st century: An ecosocial perspective. *International Journal of Epidemiology*, 30(4), 668–677. <https://doi.org/10.1093/ije/30.4.668>
- Kurowski, C., Wyss, K., Abdulla, S., Yémadji, N., & Mills, A. (2004). *Human resources for health: Requirements and availability in the context of scaling-up priority interventions in low-income countries: Case studies from Tanzania and Chad* (HEFP Working Paper 01/04). London School of Hygiene and Tropical Medicine. <https://researchonline.lshtm.ac.uk/id/eprint/12948>
- Labonte, R. (2007). Foreign Policy matters: The case of the G8 and population health. *Bulletin of the World Health Organization*. https://www.academia.edu/13220637/Foreign_Policy_Matters_The_Case_of_the_G8_and_Population_Health
- Loh, L. C., Ugarte-Gil, C., & Darko, K. (2013). Private sector contributions and their effect on physician emigration in the developing world. *Bulletin of the World Health Organization*, 91(3), 227–233. <https://doi.org/10.2471/BLT.12.110791>
- Mackintosh, M., Mensah, K., Henry, L., & Rowson, M. (2006). Aid, restitution and international fiscal redistribution in health care: Implications of health professionals' migration. *Journal of International Development*, 18(6), 757–770. <https://doi.org/10.1002/jid.1312>
- McPake, B., Maeda, A., Araújo, E. C., Lemiere, C., El Maghraby, A., & Cometto, G. (2013). Why do health labour market forces matter? *Bulletin of the World Health Organization*, 91(11), 841–846. <https://doi.org/10.2471/BLT.13.118794>
- McPake, B., Squires, A., Agya, M., & Araujo, E. (2015). *The Economics of Health Professional Education and Careers: Insights from a Literature Review*. The World Bank. <https://doi.org/10.1596/978-1-4648-0616-2>
- Mills, E. J., Kanters, S., Hagopian, A., Bansback, N., Nachega, J., Alberton, M., Au-Yeung, C. G., Mtambo, A., Bourgeault, I. L., Luboga, S., Hogg, R. S., & Ford, N. (2011). The financial cost of doctors emigrating from Sub-Saharan Africa: Human capital analysis. *BMJ*, 343, d7031. <https://doi.org/10.1136/bmj.d7031>
- Mooney, A., & Evans, B. (2007). *Globalization: The key concepts*. Routledge.
- Mwachofi, A., & Al-Assaf, A. F. (2011). Health care market deviations from the ideal market. *Sultan Qaboos University Medical Journal*, 11(3), 328–337.

- Nielson, J., & Taglioni, D. (2003, November 12–14). *A quick guide to the GATS and Mode 4*. [Paper presentation]. OECD-World Bank-IOM Seminar on Trade and Migration, Geneva, Switzerland.
- OECD. (2004). *'The international mobility of health professionals: An evaluation and analysis based on the case of South Africa'* [Chapter 3, Trends in Migration]. <https://equinetafrica.org/sites/default/files/uploads/documents/OEChres200208.pdf>
- OECD. (2015). *International migration outlook 2015*. OECD Publishing. https://doi.org/10.1787/migr_outlook-2015-en
- OECD. (2017). *Health at a glance 2017: OECD indicators*. Organisation for Economic Co-operation and Development. https://doi.org/10.1787/health_glance-2017-en
- OECD. (2020). *Contribution of migrant doctors and nurses to tackling COVID-19 crisis in OECD countries*. <https://doi.org/10.1787/2f7bace2-en>
- OECD. (2024a). *Health workforce migration*. [https://data-explorer.oecd.org/vis?lc=en&df\[ds\]=dsDisseminateFinalDMZ&df\[id\]=DSD_HEALTH_WFMI%40DF_HEALTH_WFMI&df\[ag\]=OECD.ELS.HD&df\[vs\]=1.0&dq=A..PT_WR_PRF_HLTH...&lom=LASTNPERIODS&lo=5&to\[TIME_PERIOD\]=false&pg=0](https://data-explorer.oecd.org/vis?lc=en&df[ds]=dsDisseminateFinalDMZ&df[id]=DSD_HEALTH_WFMI%40DF_HEALTH_WFMI&df[ag]=OECD.ELS.HD&df[vs]=1.0&dq=A..PT_WR_PRF_HLTH...&lom=LASTNPERIODS&lo=5&to[TIME_PERIOD]=false&pg=0)
- OECD. (2024b). *International Migration Outlook 2024*. <https://doi.org/10.1787/50b0353e-en>
- Olufadewa, I., Adesina, M., & Ayorinde, T. (2021). Global health in low-income and middle-income countries: A framework for action. *The Lancet. Global Health*, 9(7), e899–e900. [https://doi.org/10.1016/S2214-109X\(21\)00143-1](https://doi.org/10.1016/S2214-109X(21)00143-1)
- Opoku, S. T., & Apenteng, B. A. (2014). Seeking greener pastures? The relationship between career satisfaction and the intention to emigrate: a survey of Ghanaian physicians. *International Health*, 6(3), 208–212. <https://doi.org/10.1093/inthealth/ihu030>
- Packer, C., Labonté, R., & Spitzer, D. (2007a). *Globalization and health worker crisis*. Globalization Knowledge Network, Institute of Population Health.
- Packer, C., Labonté, R., & Spitzer, D. (2007b). *Globalization and health worker crisis*. Globalization and health knowledge network research paper. WHO Commission on Social Determinants of Health.
- Padarath, A., Chamberlain, C., McCoy, D., Ntuli, A., Rowson, M., & Loewenson, R. (2004). Health personnel in Southern Africa: Confronting maldistribution and brain drain. *EQUINET DISCUSSION PAPER NUMBER 3*. <https://www.semanticscholar.org/paper/Health-personnel-in-Southern-Africa-%3A-confronting-Padarath-Chamberlain/8007fd5f306f3e8bfa025ac4a3000c578bbf2bfa>
- Pang, T., & Guindon, G. E. (2004). Globalization and risks to health. *EMBO Reports*, 5(Suppl 1), S11–S16. <https://doi.org/10.1038/sj.embor.7400226>
- Pardo, I. (2020). A social anthropologist in lockdown. *Urbanities, City Life and Beyond in Times of Pandemic*, 10 (Special Issue – Edited by G. B. Prato).
- Physicians for Human Rights. (2004). *An action plan to prevent brain drain: Building equitable health systems in Africa*. PHR.org. <https://phr.org/our-work/resources/an-action-plan-to-prevent-brain-drain>

- Piketty, T. (2020). *Capital and ideology*. Harvard University Press. <https://doi.org/10.4159/9780674245075>
- Raphael, D. (2015). The political economy of health: A research agenda for addressing health inequalities in Canada. *Canadian Public Policy*, 41(Supplement 2), S17–S25. <https://doi.org/10.3138/cpp.2014-084>
- Raphael, D., & Bryant, T. (2006). Maintaining population health in a period of welfare state decline: Political economy as the missing dimension in health promotion theory and practice. *Promotion & Education*, 13(4), 236–242. <https://doi.org/10.1177/175797590601300402>
- Regmi, K. D. (2025). Five decades of neoliberal developmentalism in “Least Developed Countries”: A decolonial critique. *Journal of International Development*, 37(1), 68–86. <https://doi.org/10.1002/jid.3951>
- Robertson, R. (1992). *Globalization: Social theory and global culture*. SAGE.
- Robinson, R. (2007). *The costs and benefits of health worker migration from East and Southern Africa: A literature review*. EQUINET DISCUSSION PAPER 49. Regional Network for Equity in Health in east and southern Africa.
- Saleem, J., Ishaq, M., Zakar, R., Suddahazai, I. H. K., & Fischer, F. (2021). Experiences of frontline Pakistani emigrant physicians combating COVID-19 in the United Kingdom: A qualitative phenomenological analysis. *BMC Health Services Research*, 21, 291. <https://doi.org/10.1186/s12913-021-06308-4>
- Saluja, S., Rudolfson, N., Massenburg, B. B., Meara, J. G., & Shrim, M. G. (2020). The impact of physician migration on mortality in low and middle-income countries: An economic modelling study. *BMJ Global Health*, 5(1), e001535. <https://doi.org/10.1136/bmjgh-2019-001535>
- Sepulveda, C. F. (2020). Explaining the demand and supply model with the cost-benefit rule. *International Review of Economics Education*, 35, 100194. <https://doi.org/10.1016/j.iree.2020.100194>
- Smith, R. D., Chanda, R., & Tangcharoensathien, V. (2009). Trade in health-related services. *The Lancet*, 373(9663), 593–601. [https://doi.org/10.1016/S0140-6736\(08\)61778-X](https://doi.org/10.1016/S0140-6736(08)61778-X)
- Southern African Development Community. (2005). *Protocol on the Facilitation of Movement of Persons*. https://www.sadc.int/sites/default/files/2021-11/Protocol_on_Facilitation_of_Movement_of_Persons2005.pdf
- Stubbs, T., Kentikelenis, A., Gabor, D., Ghosh, J., & McKee, M. (2023). The return of austerity imperils global health. *BMJ Global Health*, 8(2). <https://doi.org/10.1136/bmjgh-2022-011620>
- Tomlinson, J. (1999). *Globalization and culture*. University of Chicago Press.
- Trewby, P. (2017). Migrating doctors. *Clinical Medicine*, 17(1), 4–5. <https://doi.org/10.7861/clinmedicine.17-1-4>
- USAID. (2003). *The health sector human resource crisis in Africa: An issues paper*. Bureau for Africa, Office of Sustainable Development.

- Vhumbunu, C. H., Adetiba, T. C., & Mawire, C. (2024). The Free Movement of People in SADC: Reflecting on the Experiences, Dilemmas and Strategic Considerations. *African Journal of Political Science*, 11(1), 12–29. <https://doi.org/10.36615/2j0fs582>
- Waitzkin, H. (2007). Political economic systems and the health of populations: Historical thought and current directions. In S. Galea (Ed.), *Macrosocial Determinants of Population Health* (pp. 105–138). Springer. https://doi.org/10.1007/978-0-387-70812-6_5
- WHO. (2010, April 15). *International recruitment of health personnel: Draft global code of practice. Report by the Secretariat* (Provisional Agenda Item 11.5, Document A63/8). https://apps.who.int/gb/ebwha/pdf_files/wha63/a63_8-en.pdf
- WHO. (2011, May 19). *World Health Statistics 2011*. WHO.int. <https://www.who.int/publications/i/item/9789241564199>
- World Bank. (2025). *World Bank Country and Lending Groups*. World Bank Data Help Desk. <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups>
- Zehnati, A. (2024). L'émigration des médecins, en particulier vers la France, et la desserte médicale au Maghreb. *Belgeo – Revue belge de géographie*, 1, Article 1. <https://doi.org/10.4000/12ihd>

POVZETEK

IZSELJEVANJE ZDRAVNIKOV IN GLOBALIZACIJA: PERSPEKTIVA TRŽNE LOGIKE IN POLITIČNE EKONOMIJE

Taqiyeddine Benfifi, Naima Outaleb

Globalizacija je znatno prispevala h kompleksnim spremembam v sodobnem svetu. Omogočanje potovanja med državami je danes trdno vgrajeno v okvir sodobnega mednarodnega sistema, posledica česar je bolj dinamičen in prilagodljiv trg dela kot kadar koli doslej. Zaradi globalizacije se je po vsem svetu povečalo povpraševanje po usposobljenih kadrih, zlasti na medicinskem področju. Na ta način se je vzpostavil globalni trg, na katerem se zdravniki v iskanju boljših življenjskih in poklicnih pogojev selijo iz svojih matičnih držav v države z visokim dohodkom.

Namen avtorjev prispevka je proučiti vpliv globalizacije, politične ekonomije in trga dela v zdravstvenem sektorju na mobilnost zdravnikov. Številne študije kažejo, da na migracijo zdravnikov iz držav z nizkimi in srednjimi dohodki v države z visokimi dohodki vplivajo zlasti veliko povpraševanje po zdravstvenih storitvah, večje mobilnostne možnosti ter strategije zaposlovanja držav gostiteljic. Posledica teh dejavnikov je izčrpavanje zdravstvenih virov in zmožljivosti zdravstvenega sistema v državah izvora. Študije kažejo, da obstaja znatna povezava med gostoto zdravnikov in razumevanjem razlik v zdravstvenem stanju med posameznimi državami.

Številni strukturni, zgodovinski in kulturni dejavniki prispevajo h krepitvi migracij, ki še dodatno povečujejo razlike v zdravju prebivalstva med državami izvora in ciljnimi državami. Na zdravstvene sisteme v državah z nizkimi in srednjimi dohodki so znatno vplivale neoliberalne politike, kot so varčevalni ukrepi, privatizacija, večja zadolženost in druge, ki dodatno vplivajo k povečani migraciji in poglobljajo razvojne neenakosti med državami.

Zaradi globalizacije trga dela v zdravstvu in povečanega povpraševanja po zdravnikih vlade v ciljnih državah posvečajo manj pozornosti širitvi pravice do zdravja v državah izvora. Poleg tega je vse težje doseči dogovor o nadomestilu, ki bi ga morale dobiti države izvora za izgubo svojih zdravstvenih delavcev. Neustrezno naslavljanje izseljevanja zdravnikov iz držav, ki se soočajo s pomanjkanjem tovrstnih kadrov, bo škodovalo zdravstvenim sistemom teh držav in še dodatno otežilo prizadevanja za pravičnost.

Številne mednarodne organizacije v prizadevanju za zaščito suverenih pravic držav izvora poskušajo urediti vprašanje migracij z dvostranskimi in regionalnimi sporazumi. Vendar pa so bile do zdaj tovrstne pobude zaradi različnih dejavnikov – prostovoljnega značaja pobud, nezadostnega usklajevanja med državami, pomanjkanja podatkov ter premajhnih prizadevanj ciljnih držav za izvajanje sporazumov – v veliki meri neuspešne.

K N J I Ž N E O C E N E

B O O K R E V I E W S

Florian Tissot, *Doing Family on the Move: Highly-Skilled Migrants in Switzerland and Germany*

Lausanne: Peter Lang Verlag, 2020; 358 pp.

Negotiating Paid Work and Care Work: A Review of *Doing Family on the Move*

In *Doing Family on the Move: Highly-Skilled Migrants in Switzerland and Germany*, Florian Tissot (2020) argues that the division of labor between paid work and care work among highly skilled migrant couples creates gendered hierarchies, especially in the context of career achievement when partners frequently relocate for professional reasons. Tissot presents an approachable, well-researched analysis of how "motility" and "family strategies" often reproduce gendered inequalities, especially toward women in the family unit. However, the limited analysis of participants of color restricts the scope of Tissot's discussion of gendered hierarchies in migrating family units.

Professional, economic, and social challenges before and after a migrating family unit moves from its place of origin to its destination are certain. Tissot's book explores the relationship between paid work and care work and the discrepancies this produces between men and women in highly skilled migration. His research question is how highly skilled migrants cope with professional careers on the one hand and family life on the other. This aspect of family migration is often overlooked in migration studies, in favour of internal migration or governance of migrants and refugees. The question of how care work and paid work are distributed is a source of tension for a family in transit. Often, the family unit adopts a traditional family structure with the husband as the breadwinner, relegating the wife to care work and homemaking (Banerjee & Phan, 2014; Krieger & Salikutluk, 2023; Vidal et al., 2017).

Through interviews, the book reveals that relocation produces "motile settling," a flexible mode of settling that accommodates subsequent relocations. Such settling affects a couple's ability to maintain dual professional careers, leading to gendered consequences. Defined as the capacity and readiness to move, motility results in gendered career inequalities. Male partners typically manage to balance a career, family, and the availability to relocate simultaneously. In contrast, female partners often cannot do all three due to the uneven division of care work, including substantial caregiving, homemaking, and emotional labor responsibilities they must undertake.

The epistemological framework critiques and deconstructs traditional distinctions between migration and mobility, aiming for a more nuanced understanding in migration and expatriation studies. This framework includes "methodological individualism" and "methodological nationalism" from existing academic literature. The former warns against conceptualizing the social context of migrants without a collective and dynamic approach to care work. The latter cautions against overlooking

nation-states or overemphasizing the link between territory, state, and culture. Tissot introduces “methodological economism” to complement these. It highlights the risks of opposing frictionless mobility (which implies temporary adaptation) and of controlled migration (which implies permanent integration).

The study involved 36 men and women, highly skilled migrants from the Lake Geneva Region, Switzerland, and the Frankfurt Rhine-Main Region, Germany, who participated in semi-structured qualitative interviews. Tissot developed a framework to identify the “primary mover,” who initiates the move, and the “secondary mover,” who reacts to it. A crucial distinction in understanding where gendered gaps appear in career achievement and wages is based on Flamm and Kaufmann’s (2006) research on the difference between men and women in relation to: 1) family life, 2) upward professional career, and 3) motility.

Tissot lays out three main arguments. First, the intersection of mobility and family dynamics reveals a deeply gendered tension between career mobility and family responsibilities. Career decisions and relocations are driven by primary movers, who are often male partners, while female partners—secondary movers—typically bear the majority of caregiving and homemaking responsibilities. Second, gendered career coordination leads to significant gender hierarchies in career opportunities and achievements. As primary movers, male partners often simultaneously combine professional advancement, family life, and readiness for subsequent relocations, whereas female partners face structural challenges that limit them to balancing only two of these factors at a time. Finally, Tissot examines the challenges and opportunities associated with these different family strategies: one prioritizes professional mobility and childcare but sacrifices dual careers; another favors stability and dual careers at the expense of professional mobility; and a third maintains mobility and dual careers but compromises family cohesion or the possibility of having children. All three reveal varying degrees of gendered inequality, or a “glass ceiling,” for women in relation to paid work and care work.

The motility and family strategies analysis underscores gendered inequalities, particularly for women, in migrating families. Motility reproduces these inequalities through three narratives. The “structural constraint narrative” describes secondary movers resigning from the labor force to join primary movers because the latter have “bigger” jobs. There is no negotiation over care work in the “career men and career women narrative,” as secondary movers cannot find alternative paid work after relocating. The “paradoxical family men narrative” combines elements of the previous two. The primary mover focuses solely on paid work for the family due to structural constraints and the secondary mover’s lack of alternative employment. Banerjee and Phan’s (2014) study of “tied movers” in Canada, where husbands often handle paid work while wives manage household responsibilities after migration, parallels Tissot’s findings. Hence, they reinforce Tissot’s argument by providing a wider theoretical framework and substantial evidence beyond the European setting.

A significant strength of Tissot's book is its attempt to integrate two distinct fields: transnational families and highly skilled migration, which are rarely studied together. Tissot's analytical lens was built upon the framework developed by another group of scholars. A study by Andresen, Bergdolt, Margenfeld, and Dickmann study (Andresen et al., 2014) distinguishes between expatriation types based on whether the subject is the initiator of the move (i.e., assigned expatriate, drawn expatriate, intra- and inter-self-initiated expatriates). It fails to acknowledge the partners' relationship; Tissot addresses this shortcoming by developing a framework structured around two types of movers: the primary mover and the secondary mover. The former takes the initiative of relocating while the latter reacts to it.

Furthermore, Tissot balanced his argument by incorporating findings from his interviews that ran counter to the general understanding of the applied theoretical framework. Maria's narrative comes across as critical of motility, downplaying its impact on the partnership. She was able to enter the labor force after each relocation of her partner, offering another way to address the lack of an alternative narrative in a motile strategy.

One unresolved issue concerns the representation and analysis of participants of color, or more broadly racialized and non-Western participants. Tissot defines "highly skilled migrants" primarily by educational attainment or professional position, rather than by race or country of origin. Although the study includes participants from Indonesia, Brazil, India, Japan, and South Korea, the empirical analysis does not appear to examine these respondents as a distinct group. As a result, the book only partially addresses how race, nationality, and legal status may shape the dynamics it describes. Returning to the question of participants of color in the study, Tissot's answer would be his interview with several Indonesian respondents who faced constraints on residency permit renewal that would be refused if they were to travel back to their home country. These potential participants were not engaged as such challenges are "beyond the scope of a lot of the other respondents" (p. 116). Avoiding this potential pool of applicants means losing insight into another aspect of studying migrating family units.

In contrast, the Banerjee and Phan (2014) study predominantly featured participants of color, revealing different dynamics, with some immigrant men undertaking more domestic responsibilities and expressing guilt or shame about their wives supporting them. Tissot's participants expressed only frustration. Therefore, difficulties like permit renewal should not preclude engaging diverse participants, particularly those from non-Western backgrounds.

Tissot noted differences between Germany and Switzerland in the field of welfare state regimes. Germany has significantly increased public childcare provision, whereas Switzerland retains short maternity leave, no paternity leave, and low public investment in childcare. Families' ability to balance competing demands is significantly influenced by local policy. For example, Switzerland's lack of midday school care perpetuates gendered care roles because it pushes one partner (often

the woman) to assume these burdens. Yet regions with more developed family policies like Frankfurt support dual-career couples. Participants noted that access to childcare services and family-friendly policies is critical for mitigating inequalities faced by secondary movers. Future research could examine how the local laws in other parts of Germany, Switzerland, and wider Europe are problematized, re-structured, and implemented in the context of childcare services and family policies.

Tissot's book offers a valuable perspective on wider gender inequalities within migrating family units through the dynamics between primary and secondary movers. Nevertheless, the limited analysis of participants of color restricts the potential findings and raises several questions for new knowledge production at the intersection of migration, career, family, and gender. These include how families without local childcare innovate to balance responsibilities, and the hidden costs of secondary movers sacrificing careers. As academic and public debates on gender equality continue, Tissot's work serves as a reminder that the negotiation of paid work and care work within migrating couples remains gendered, often favoring men.

Juan Paulo Gabriel Amurao

REFERENCES

- Andresen, M., Bergdolt, F., Margenfeld, J., & Dickmann, M. (2014). Addressing international mobility confusion: Developing definitions and differentiations for self-initiated and assigned expatriates as well as migrants. *The International Journal of Human Resource Management*, 25(16), 2295–2318. <https://doi.org/10.1080/09585192.2013.877058>
- Banerjee, R., & Phan, M. B. (2014). Do tied movers get tied down? The occupational displacement of dependent applicant immigrants in Canada. *Int. Migration & Integration*, 16, 333–353.
- Flamm, M., & Kaufmann, V. (2006). Operationalising the Concept of Motility: A Qualitative Study. *Mobilities*, 1(2), 167–189. <https://doi.org/10.1080/17450100600726563>
- Krieger, M., & Salikutluk, Z. (2023). Migration and dynamics in men's and women's domestic work. *Journal of Family Issues*, 44(4), 954–976.
- Vidal, S., Perales, F., Lersch, P. M., & Brandén, M. (2017). Family migration in a cross national perspective: The importance of within-couple employment arrangements in Australia, Britain, Germany, and Sweden. *Demographic Research*, 36(10), 307–338.

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)
- Izjava o dostopnosti podatkov (povezava: <https://ojs.zrc-sazu.si/twohomelands/ResearchDataManagement>)
- 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, obojestranska poravnava, razmak med vrsticami 1,5
 - Sprotno opombe: pisava Times New Roman, velikost 10 pt, obojestranska 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 podnaslovi 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 »Viri in literatura« za glavnim besedilom (glej Točko 5). Avtorji naj tako pri sprotnem 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 kratico ,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).
- Citiranje raziskovalnih podatkov: Avtorji morajo vse uporabljene podatkovne vire ustrezno citirati oziroma v 'Izjavi o dostopnosti podatkov' ustrezno opisati, če podatki niso digitalizirani oziroma če zaradi drugih omejitev – npr. Zakon o varstvu osebnih podatkov (ZVOP-2), Zakon o avtorskih in sorodnih pravicah (ZASP) – niso objavljeni.

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 »Viri in 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. Enoto 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.rtvlo.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)
- Data Availability Statement (see: https://ojs.zrc-sazu.si/twohomelands/user/setLocale/en_US?source=%2Ftwohomelands%2FResearchDataManagement)
- Reference list (References): see point 5 below for instructions
- 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.
- Please use American English spelling (Merriam-Webster Dictionary) and serial (Oxford) commas.
- 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)..
- Long quotations (five lines or more) should be formatted in a separate paragraph indented by 1.25 cm, without quotation marks, in normal font (not italics).
- 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).
 - o Citation of research data: Authors must cite all data sources appropriately and are encouraged to provide a suitable explanation in the Data Availability Statement if the cited data are not available digitally or have not been published due to other restrictions – e.g., the Personal Data Protection Act (ZVOP-2), the Copyright and Related Rights Act (ZASP).

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.

ČLANKI / ARTICLES

Janja Žitnik Serafin

Uvodnik: Inštitut za slovensko izseljenstvo in migracije to jesen praznuje štiridesetletnico priključitve k ZRC SAZU

Urh Šelih

Med odgovornostjo in solidarnostjo: novi solidarnostni mehanizem EU in njegove meje pri prerazporejanju bremen

Alenka Vrbinc, Donna M. T. Cr. Farina, Marjeta Vrbinc

Oglasi v slovarjih za slovenske priseljence v ZDA na začetku 20. stoletja

Mateja Curk

Alternacija kodov v proznih delih Gorana Vojnovića

Urh Frlež

Podoba domovine v delih Franceta Papeža

Maja Ramuš

Ruski general Ivan T. Beljajev v Zelenem peklu

Mojca Vah Jevšnik, Sanja Cukut Krilič

Emerging Diversifications of Labor Migration to Slovenia: From the Western Balkans to Asia

Luděk Jirka

Undesirable Reverse Remittances: The Case of Young Ukrainian Students in Czechia

Juraj Pokos, Rebeka Mesarić Žabčič, Nenad Pokos

The Croatian Population Among the Oldest in the World: Shifts in Age Structure, 1991–2021

Nina Bilokopytova, Karim El Guessab, Volodymyr Bilokopytov

The Phenomenon of "Balkan Islam" as a Factor of Intercultural and Ethno-Social Dialogue

Taqiyeddine Benfifi, Naima Outaleb

Physician Emigration and Globalization: A Market Logic and Political Economy Perspective

KNJIŽNE OCENE / BOOK REVIEWS

Florian Tissot, *Doing Family on the Move: Highly-Skilled Migrants in Switzerland and Germany* (Juan Paulo Gabriel Amurao)

ISSN 0353-6777



9 770353 677013

ISSN 1581-1212



Založba ZRC