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Izdala / Published by
ZRC SAZU, Inštitut za slovensko izseljenstvo in migracije /
ZRC SAZU, Slovenian Migration Institute

Tisk / Printed by
Collegium Graphicum d. o. o., Ljubljana

Naklada / Printum
150

Naslov uredništva / Editorial Office Address
INŠTITUT ZA SLOVENSKO IZSELJENSTVO IN MIGRACIJE ZRC SAZU
p. p. 306, SI-1001 Ljubljana, Slovenija
Tel.: (+386 1) 4706 485; Fax (+386 1) 4257 802
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<http://twohomelands.zrc-sazu.si>

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

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

*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:

FRANCIS (Sociology/Ethnology/Linguistics of Francis), IBZ – International Bibliography of Periodical Literature, IBR – International Bibliography of Book – Reviews, Sociological Abstracts, IBSS – International Bibliography of the Social Sciences, MSH-Maisons des Sciences de l'Homme, SCOPUS, Social SciSearch, Journal Citation Reports/Social Sciences Edition.

Letna naročnina 18 € za posameznike, 28 € za institucije.

Annual subscription € 18 for individuals, € 28 for institutions.

Master Card / Euro Card and VISA accepted.

Naročila sprejema / Orders should be sent to:

Založba ZRC, p. p. 306, SI-1001 Ljubljana, Slovenija

Fax: (+386 1) 425 77 94; E-mail: zalozba@zrc-sazu.si

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E S S A Y S A N D A R T I C L E S

REAPPROPRIATING THE BALKAN ROUTE: MOBILITY STRUGGLES AND JOINT-AGENCY IN BOSNIA AND HERZEGOVINA

Andrej KURNIK^I, Maple RAZSA^{II}

COBISS 1.01

ABSTRACT

Reappropriating the Balkan Route:
Mobility Struggles and Joint-Agency in Bosnia and Herzegovina

In this article the authors question how the EU's enlistment of the post-Yugoslav states into the EU's border regime has exacerbated local nationalisms. They also question how, on the other hand, migrant struggles to cross this territory have intersected with local movements against nationalism and silenced political alternatives. They use the notion of joint-agency, that is, the co-articulation of mobility struggles and antinationalist struggles, in ex-Yugoslavia to read the recent history of the route across the region generally and the current predicament in Bosnia and Herzegovina in particular. This alternative reading facilitates an understanding of the potential of struggles for freedom of movement to reanimate a critique of the coloniality of power in the European borderlands such as the Balkans.

KEYWORDS: migration, social movements, autonomy, Bosnia and Herzegovina, Balkans, Europe

IZVLEČEK

Reapropriacija Balkanske poti:
Boji za mobilnost in so-delujočnost v Bosni in Hercegovini

Avtorja se v članku sprašujeta, kako je vloga postjugoslovanskih držav v restavraciji mejnega režima Evropske unije zaostriła nacionalizme in kakšen je bil po drugi strani spoj med migrantskimi boji, lokalnimi antinacionalističnimi gibanji in zamolčanimi političnimi alternativami? Pojem so-delujočnost bojev za mobilnost in antinacionalističnih bojev na območju nekdanje Jugoslavije omogoča branje nedavne zgodovine migrantske poti skozi regijo in ožje razumevanje trenutnih tegob zaradi t. i. migrantske krize v Bosni in Hercegovini. Takšno alternativno branje omogoča razumeti potencial, ki ga imajo boji za svobodo gibanja za ožvitev kritike kolonialnosti oblasti na mejnem območju EU, kakršno je Balkan.

KLJUČNE BESEDE: migracija, družbena gibanja, avtonomija, Bosna in Hercegovina, Balkan, Evropa

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INTRODUCTION

In recent years, we have conducted militant research with diverse people on the move¹ –that is, studying and contributing to mobility struggles – before, during, and after the dramatic 2015–2016 “long summer of migration” (Kasperek, Speer 2015). This research has involved investigating a series of border struggles across the territory of ex-Yugoslavia – a region pivotal to nearly all the many permutations of the “Balkan Route” (Lunaček Brumen, Meh 2015; Kurnik 2015; Beznec, Speer, Stojić Mitrović 2016; Hameršak, Pleše 2017; Ahmetašević, Mlinarević 2019). Here, we draw on our participation in various activist initiatives, such as Info Kolpa (2019),² in Bosnia and Herzegovina (BiH) – site of the most urgent contemporary mobility struggles in the Balkans. A series of questions emerge from this experience. What are the consequences of the EU enlisting BiH and the wider ex-Yugoslav region into the EU border regime? Does this *EUropeanization* – the expansion of the European Union and the extension of its influence into hopeful future members – push “The Balkans” toward resolving ethnic conflicts and encouraging tolerance, as is so often claimed? Or, do struggles around the route – and their implication in other dimensions of longer-standing processes of *Europeanization*,³ including geopolitical, racial, and colonial hierarchies – indicate that the processes of EU integration and Yugoslav disintegration are mutually reinforcing rather than opposing? At the same time, do mobility struggles bring to the surface and reanimate submerged local histories of antinationalism, refugeehood, anticolonialism, and heterogeneity?

In what follows, we first situate contemporary struggles of people on the move in BiH within the larger history of the route, especially as it developed across ex-Yugoslavia. Narrating how the route was opened makes clear – in contrast to the many state-centric accounts of the Balkan Route – the role of migrant agency, expressed in the carving of unruly itineraries across the Balkans and temporarily suspending the EUropean migration regime (De Genova 2017). Attention to border struggles at particular localities allows us to generate concepts crucial to making sense of contemporary BiH. We draw on the autonomy of migration literature – which rejects state-centered analyses that understand border and migration regimes as dictated by the sovereign power of the nation-state – stressing the primacy of mobility struggles (Casas Cortes, Cobarrubias, Pickles 2015) instead. We extend that theorization by attending to how migratory “escape paths” are not enacted across empty

1 We generally use “people on the move”, or “people”, eschewing the classifications through which authorities “divide and partition” migrant multiplicities and manage mobility (Tazzioli 2017).

2 Info Kolpa is a collective from Ljubljana that is involved in various solidarity initiatives with people on the move. One of the main activities of the collective has been to monitor the situation on the border between Slovenia and Croatia and to inform the broader public about the plight of people on the move.

3 Throughout the text, we will use the terms EUropeanization and EUropean to designate processes related to the expansion of the EU, and the terms Europeanization and European to designate longer-standing processes.

space but necessarily intersect with local struggles against state sovereignty and, in ex-Yugoslavia, with resistance to a palimpsest of Europeanization processes. This conjuncture of mobility struggles and local struggles, experiences, and traditions we term *joint-agency*.

Second, we attend to how states, confronted with a thoroughly disrupted border regime, turned to processes of formalization, which – though these processes initially accelerated mobility along the route – were also crucial in the repression of mobility. We conclude this history with the increasing criminalization of solidarity and state reliance on illegal pushbacks of migrants seeking asylum. These state practices led people on the move to redirect the route into BiH and precipitated the current predicament in BiH. Using a critical reading of Europeanization – including its articulation with Islamophobia, racialization, and the enforcement of the nation-form (Balibar 2004) on this diverse territory – we describe how layered processes of Europeanization have been pivotal to controlling mobility in BiH. What is more, Europeanization not only attacks joint-agency, it also corrodes inclusive forms of local self-government and imposes exclusive subordinate forms of government. In conclusion, we consider how, from the vantage point of joint-agency, a new narrative of the Balkan Route (and migrant routes in general) can contribute to amplifying local critiques of Europeanization as an imposition of (neo)colonial domination and to valorizing the reanimation of the popular local conceptualization of common life based on diversity and heterogeneity.

THE HISTORY OF THE SO-CALLED BALKAN ROUTE

Opening the Route

In many accounts, Angela Merkel opened the Balkan Route with her declaration of an open-door policy and the suspension of the Dublin Regulation in September 2015. She only made this decision, however, when thousands of people on the move, frustrated with their mistreatment in Hungary, took over the highway from Budapest and walked toward Austria and Germany in a “March of Hope” (Kasperek, Speer 2015). Merkel’s response, in other words, was less a gift than a concession to successful mobility (El-Shaarawi, Razsa 2019). Nevertheless, the perception lingers that state policies determined the course of this “crisis”. Furthermore, core European states are often viewed as having responded to the Balkan Route in a more permissive, welcoming, and tolerant manner than Eastern and Southeastern European states, epitomized by images of Hungarian police teargassing and beating migrants at their border.

The September 2015 March of Hope, animated by people on the move, was the culmination of a series of migrant struggles across that “long summer of migration”, struggles which saw state authorities repeatedly make previously unimaginable

concessions to mobility. To be sure, for years, people had made their way to Europe, often clandestinely with the help of smugglers, along the so-called Balkan Route, as it was initially designated by Frontex (alluding to the region's reputation for criminality, especially smuggling). We reappropriate this name here, both as a recognition that these collective struggles deserve a proper noun and to affirm rather than denigrate the Balkan character of the route. In any case, the route grew dramatically for a variety of reasons during the spring and summer of 2015 (including deteriorating conditions in Syria and surrounding states that hosted refugees). The swelling numbers of people along the route changed the character of mobility: people were suddenly able to travel without smugglers and, when stopped by police, to mount collective actions against immobilization, including across the territory of ex-Yugoslavia (El-Shaarawi, Razsa 2019). The struggles at the borders of Macedonia, Serbia, Croatia, and Slovenia, from which we offer a few examples here, therefore built upon earlier struggles that stretched back across Greece, the Eastern Aegean, Turkey, and deep into the Middle East, Central Asia, and Sub-Saharan Africa.

We begin with examples in the south and work our way northward (as each struggle enabled the presence of people on the move at the next border struggle). In Preševo, a majority Albanian municipality stretching along the Serbian side of the Serbian-Macedonian border, our research on solidarity initiatives led us to local youth activists who intervened in July 2015 when local merchants, hoteliers, and taxi-drivers charged migrants exploitative prices. Mobilizing the local community's own experience of fleeing the violence of the Serbian military in 1999, they appealed to their neighbors, saying, "How can we mistreat these people, when we fled across the same fields they are traveling when we were refugees?" Where these appeals were not successful, they distributed thousands of fliers informing people on the move what prices they could expect to pay for services in Preševo.

Furthermore, these youth activists introduced us to a local imam who housed refugees in empty homes and apartments, a practice made possible by the labor migration of most of the residents of his village to Switzerland. It turned out that the imam, who had studied theology in Syria through the Non-Aligned Movement, had initially hosted small groups in his mosque but then expanded his assistance when thousands began arriving per day. The imam and youth activists alike situated their activities in longstanding Albanian traditions of autonomous and nonviolent organizing associated with Ibrahim Rugova – organizing which emerged to resist Serbian apartheid-like repression of ethnic Albanians in the 1980s – and which was largely extinguished by the rise of the Kosovo Liberation Army and the Western intervention of 1998–1999. Crucially, Preševo was in Serbia proper, not in Kosovo, so autonomy was not conflated with state sovereignty and took on decidedly non-sovereigntist and minoritarian hues (Ibid.).

After the March of Hope, Hungary completed the wall along its southern border with Serbia on 15 September 2015. People on the move began seeking itineraries westward toward Croatia. Like in Preševo, the Croatian-Serbian border ran alongside

sites of ethnonationalist violence, some of the worst of the 1991–1995 war. That conflict tore across the ethnically-mixed area of Croatia’s Eastern Slavonia, first at the expense of Croats, then through the ethnic cleansing of Serbs, as both ethnonationalist projects attempted to create “pure” territory. Here too, many local residents explained their welcoming attitudes toward, and solidarity initiatives with, migrants in terms of their own experiences of refugeehood. The response of local people was especially strong when the route was informal and the state had not yet taken control through formalization, discussed below.

What is more, numerous Croatian organizations and informal initiatives pressed, and continue to press, for welcoming state policies, setting the tone for Croatia’s initially warm public response to people on the move. They include, most prominently, *Are you Syrious?* and the Welcome Initiative co-initiated by the Centre for Peace Studies (CMS), which adopted a strategy of “mainstreaming solidarity” and welcoming rhetoric in Croatia (Bez nec 2019). Many of the individual activists and organizations involved emerge from a series of antinationalist and transnational solidarity initiatives in recent Croatian history, with CMS, for example, emerging from the Antiwar Campaign of Croatia, which resisted the rise of belligerent nationalism and war in Croatia.

Only a few days after people on the move opened the route into Croatia, they headed toward Slovenia in the northwest, where the Slovenian authorities attempted to close the border (Kurnik 2015). A network of Slovenian activists, many with past experiences in migrant struggles, including struggles against the “Erasure”, Slovenia’s bureaucratic analog to the ethnic cleansing seen in Croatia and BiH (Razsa, Kurnik 2012), arrived to show support for the route. After 36 hours in the rain, the crowds trapped in the no-man’s land between Croatia and Slovenia at the major border crossing of Bregana-Obrežje were losing patience with the Slovenian authorities’ refusal to allow them to pass. Refugees and activists took coordinated action, largely at the initiative of the Iranians and Afghans present, and blockaded the entire highway. Soon the lines of immobilized trucks, busses, and cars stretched for dozens of kilometers to the south, and the authorities relented, providing free commercial busses to convey people onward to Austria (Kurnik 2016; El-Shaarawi, Razsa 2019).

To be clear, the opening of the Balkan Route was, undoubtedly, driven first and foremost by migrant mobility, by the incorrigible insistence of people on the move that they would find a way to continue on their way regardless of state reaction. Attention to the border struggles along the route makes the shifting-yet-assertive quality of this power plain. So, in this sense, the route certainly confirms the theorizing of the autonomy of migration, if in perhaps particularly dramatic conditions, in which the line between migration and more recognizable social movement activity is particularly thin and porous. However, this migration was neither crossing empty space nor only crossing national territory and its always unequally distributed forms of state enforcement. The Balkan Route articulated with a series of local struggles, many of which, in the case of the territory of ex-Yugoslavia, can be traced

to traditions of resistance⁴ to the violent imposition of the nation-state form – itself a crucial dimension of Europeanization. We argue that this co-articulation of struggles against state sovereignty,⁵ or the crossing of what Papadopoulos et al. (2008) call “paths of escape from state sovereignty” has been a persistent characteristic of the Balkan Route (and is likely replicated in other settings), and can be understood as a form of joint-agency.

From Formalization to Criminalization

It is important to remember that, with the notable exception of Hungarian state policies, states along the route did not respond initially with violent repression. There was, rather, a relatively long period of formalization that effectively accelerated the number of travelers while also enabling eventual closure far from the European core. Slovenian authorities, for example, feared that border disorder might lead Austria and Italy to introduce border controls and effectively exclude Slovenian citizens from the Schengen Area.⁶ They responded by asserting full control over the route’s path, excluding activist initiatives and only granting major NGOs, such as the Red Cross, access to people on the move, while also providing officially organized transport. Croatia, on the other hand, not yet part of the Schengen Area and with memories of refugee experience still fresh in the popular consciousness, was rhetorically more welcoming. Authorities celebrated their efficient transport of migrants across Croatia to the Slovenian border. Rhetoric aside, Croatian formalization was very similar to that of Slovenian, however. Excluded solidarity activists remarked with frustration that migrants “seem to enter a tunnel at the Serbian-Croatian border and emerge somewhere in a train station in Germany”. Serbia, on the other hand, with relatively distant prospects of EU membership, pursued less formalization. As Stojić Mitrović argues, Serbian authorities saw in the route an opportunity to overcome European perception of Serbia as retrograde anti-Muslim due to its role in the wars of Yugoslav succession. They highlighted a humanitarian and welcoming approach (Stojić Mitrović 2018). When Serbian authorities did try to impose a monopoly over travel, activists in Preševo protested and publicized links between the chosen private carrier and high government officials. Their actions kept access open to a host of private and solidarity actors.

4 By this we refer to the rich history of anti-colonial and anti-modern struggles for self-determination that were inclusive and opened to alterity. Those struggles were most explicitly (though not without ambivalence) articulated in the national liberation struggle against Nazi and fascist occupation. Nowadays struggles against nationalist exclusivism on the territory of former Yugoslavia could be understood as an implicit or explicit continuation of such a history of struggles.

5 We are not saying that mobility struggles are always accompanied by an anti-state ideology (though they sometimes are) but they do necessarily position migrants in conflict with state-bordering and often involve claims that other values, such as the unification with family already in Europe, trump state law.

6 See <https://www.rtvslo.si/slovenija/pahor-slovenija-mora-ostati-v-ozjem-delu-eu-ja/379132>.

The formalization of the route, which enabled more than one million people to reach northern and western Europe, we argue, was an attempt to end the self-management of migration and to break the co-articulation of mobility struggles and local anti-hegemonic practices, both of which have elements of escape from state-centered sovereignty and sociability. Formalization, therefore, paved the way for the repression of the opened route. Following the Paris terrorist attacks in November 2015, authorities began to filter the route; only Afghans, Iraqis, and Syrians were allowed to travel onward. Then, in March 2016, Merkel orchestrated the EU-Turkey deal to fully close the formalized corridor, pushing people back into clandestinity. When the borders closed across the region in March 2016, Croatia pivoted mercilessly – though secretly, with no public discussion – to its by now well-documented practice of illegal pushbacks,⁷ which regularly included detentions without any formal arrest or documentation, beatings, robberies, and involuntary and summary returns across the green border (woods and fields) into Serbia.

The case of the Hussiny family illustrates with particular brutality the reimposition of criminality on migration as well as the criminalization of solidarity, following the closure of the formalized corridor. The Croatian police apprehended this Afghan family as they rested in a park after their undocumented border crossing. The police pushed them back into Serbia along the railroad tracks. In the lights of an approaching train, they scrambled to find their four young children. They carried the bloody body of six-year-old Madina back to the Croatian authorities, who recorded her death, took her corpse, and promptly pushed the family back into Serbia.⁸ Still hoping to seek asylum, but understandably afraid of further pushbacks, the family contacted AYS (Are You Syrious) when they again crossed into Croatia. An activist from AYS reported their location to the nearest police station and informed the police that AYS was monitoring the case to make sure that the family got fair treatment. This activist was promptly arrested and charged with people smuggling.⁹ Such pushbacks of migrants, and the criminalization of solidarity, are now standard practice across much of the Balkans. Numerous migrants in Belgrade in 2017 reported to us that they had already been beaten and pushed back more than two dozen times from Croatia. In late 2017, with Serbia increasingly perceived as a dead-end, people moved in greater numbers into BiH. With Northwest Bosnia much closer to Italy than Northwest Serbia, moving into BiH reduced the hostile territory people on the move had to cross from 500 to 225 kilometers. While geography was an important factor, the specificities of BiH also determined the route's evolution.

7 See <https://www.borderviolence.eu/new-report-on-cases-of-torture-of-asylum-seekers-by-croatian-authorities-at-eu-external-borders/#more-14133>.

8 See <https://www.theguardian.com/world/2017/dec/08/they-treated-her-like-a-dog-tragedy-of-the-six-year-old-killed-at-croatian-border>.

9 See <https://medium.com/are-you-syrious/ay-s-special-when-governments-turn-against-volunteers-the-case-of-ays-81fcfe0e80e7>.

BIH AND THE BALKAN ROUTE

Multiethnic BiH is today a de facto international protectorate, still struggling to contain the disintegrative forces unleashed during the rise of nationalisms in the late 1980s and the ensuing 1992–1995 war. The war ended with Western military intervention and the imposition of the Dayton Agreement and Constitution that institutionalizes rule by an ethnonational logic; however, none of the three largest ethnicities enjoys a majority. Gorana Mlinarević, an independent researcher and solidarity activist, summed up the Dayton Constitution to us as fundamentally neoliberal and neocolonial, reproducing and deepening ethno-national divisions while also encouraging privatization. Asim Mujkić, a BiH political theorist, stressed that it was the reintroduction of capitalist relations of production and the concomitant imposition of the nation-form since the 1980s – something he defines as two intertwined aspects of Europeanization – that have particularly negative effects on mixed and multiethnic societies such as BiH, leading to wars with ethnic cleansing and territorial delimitation of violently homogenized ethno-national communities. The Europeanization of BiH, as elsewhere in ex-Yugoslavia, has been accompanied by a form of epistemic violence. This violence silences and obscures the history of autochthonous and popular alternative conceptualizations of statehood in conditions of fundamental diversity, which we discuss further below.

The Evolution of the Route in BiH

During 2018 more than 24,000 people on the move registered their intention to seek asylum in BiH, which temporarily legalized their stay in BiH (a tiny fraction of these were seeking asylum in BiH, which is, in any case, extremely difficult to obtain). That year, more than 20,000 people managed to continue their journey clandestinely. Because of the militarization of the borders between Croatia and BiH, and between Croatia and Slovenia further north, however, growing numbers find themselves stranded in BiH. A local representative of the International Organization for Migration (IOM), Peter van der Auweraert, estimated that about 8,000 refugees and migrants were in the country in the summer of 2019.¹⁰ When the route first turned toward BiH in late 2017, there was distinct laxity on the part of BiH state authorities, and the route was primarily managed by local and international solidarity initiatives and people on the move themselves. Soon after those self-managed beginnings, a process of formalizing the route began to tame and contain mobility. On the one hand, as we learned through calls to a hotline associated with Info Kolpa (2019), the Slovenian and Croatian police further intensified and standardized violent chain pushbacks to BiH, like earlier pushbacks to Serbia.

¹⁰ See <https://www.irishtimes.com/news/world/europe/migrants-in-bosnia-face-dire-situation-trying-to-reach-eu-1.3918548>.

On the other hand, BiH authorities began to discourage the local population's material expression of solidarity with people on the move. Initially, the EU conditioned its financing of state-run reception facilities on their location far from the Croatian (i.e., the EU border). Then in November 2018, several hundred migrants and refugees blocked the BiH-Croatian border crossing at Maljevac, demanding entry and blocking traffic for several days and sparking well-reported police repression.¹¹ The EU promptly changed its policy by funding reception facilities close to the border but shifted funding away from the BiH state to the IOM. According to one informant in the BiH Ministry of Interior, this U-turn by the EU left the BiH authorities disoriented. At the same time, Nidžara Ahmetašević and Gorana Mlinarević, authors of a 2019 activist report on the route understood this turn as a clear symptom of BiH's neocolonial submission. In the context of the dispersed authority among the three largest ethno-national communities and degraded sovereignty of the state, intergovernmental organizations – especially the IOM – began gradually taking control over the management of the route. From early 2019, migrants and refugees are increasingly directed – when not compelled – to enter EU-funded and IOM-run reception centers in the border area (ibid.).

With the IOM increasingly controlling housing and food for the route in BiH, local authorities (unconstitutionally) prohibited local residents from providing services to people on the move. They established internal administrative borders to further control mobility, including checkpoints at cantonal borders, a move which had troubling echoes of wartime practices in BiH. Following this, the reaction of the local population changes considerably. Currently, refugees and migrants encounter an ever more hostile environment, forcing them to seek basic provisions and services in overcrowded and reception camps that act as places of deterrence and discouragement. But the local response in BiH was not always hostile; initially, the local population, especially in predominantly Bosniak (Muslim) parts of the country, was very welcoming, and many locals involved themselves in solidarity activities with people on the move.

Many mosques were opened to provide shelter and assistance. This began to change when the state-sponsored Islamic Community (*Islamska zajednica*) officially discouraged believers from using mosques as sites of solidarity with migrants.¹² This decision was surely influenced by the Bosniak political establishment's fears that Muslim solidarity would contribute to suspicions that Bosniaks in BiH are a breeding ground for Islamic radicalism and terrorism. As but one example of such rhetoric, a high official of the Austrian Ministry of Interior, speaking after the route had moved into BiH, stated that the route should no longer be referred to as the Balkan Route but

11 See <http://moving-europe.org/refugee-protest-camp-near-velika-kladusa-evicted/>.

12 See <http://www.islamskazajednica.ba/vijesti/mina-vijesti/26321-apelujemo-na-drzavne-organe-da-aktiviraju-akcione-planove-za-zbrinjavanje-izbjeglica>.

rather as the “Mosque Route”.¹³ Such Islamophobic statements resonated strongly in the region, emboldening BiH Serb (Orthodox) and Croat (Catholic) nationalists, who alleged that Bosniaks were seeking to change the country’s demographic balance by settling new Muslim populations. Such nationalist instrumentalization of the refugee and migrant “crisis”, together with the dispersed authority and neocolonial attitude of the EU and the role of the IOM, produced a growing distance between local populations and people on the move.

These rising tensions with people on the move were tied, therefore, to the legacy of the nationalist-led war of the 1990s. After all, this was a war waged against the possibility of a mixed and multiethnic society, on existing innovative conceptions of statehood in conditions of diversity, and on Islam. As David Henig has pointed out, there have been multiple waves of ethnic cleansing on Muslim populations in the Balkans, from the wars for Greek, Bulgarian, and Serbian statehood against the Ottoman Empire through the more recent wars in BiH and Kosovo (Henig N. D.). Taken together, these expulsions resonate with the fifteenth-century Reconquista of the Iberian Peninsula by Christian forces. There is clearly a layering of contemporary European Islamophobia and the regionally-specific histories of war against Islam. The wider Western resonances of this layering were made plain by the fact that the Christchurch shooter etched the names of both medieval Serbian and more recent convicted Serbian war criminals onto the automatic weapons he used to murder 42 people in a mosque in New Zealand.¹⁴

The Foundations of Joint-Agency

Our collaboration with local Bosniak activists made clear that forms of Islamophobia significantly inhibited the possible role of Muslim cosmopolitanism as a foundation of joint-agency. When we asked one solidarity activist, who described herself as a pious Muslim, about the reason for the Islamic Community’s intervention against solidarity, she said that it probably happened because Bosniak solidarity with people on the move could be misunderstood. One Bosniak researcher of migration even suggested to us that the best solution for BiH would be if the EU established hot spots on BiH territory. This practice, he surmised, would take the process wholly out of BiH hands, avoiding any reason to suspect the intentions of BiH authorities – especially Bosniaks – in dealing with refugees and migrants from predominantly Muslim countries. Additionally, Asim Mujkić described to us the negative reactions of Bosniaks to the presence of migrants and refugees, as the “otherwise orientalizing others”. The internalization of Islamophobia, in other words, was instrumental in inhibiting Muslim cosmopolitanism as a foundation of joint-agency.

13 See Radio Slobodna Evropa “Austrijski ministar: Nova ‘džamijska ruta’ za migrante ka EU”, <https://www.slobodnaevropa.org/a/29265324.html>, 2018.

14 See <https://www.aljazeera.com/news/2019/03/zealand-mosque-gunman-inspired-serb-nationalism-190315141305756.html>.

Although the Bosniak community in BiH still harbors antinationalist sentiments and conceptions of BiH as inclusive mixed and multiethnic, the processes of nationalizing and racializing of the Bosniak community and BiH Islam increasingly mark the Bosniak political landscape (Šaćić 2007). Religious Bosniaks, often openly expressed blatantly racist views regarding refugees and migrants. Many expressed the civilizational superiority of BiH Islam and explicitly laid claim to its European character. One imam near the BiH-Croatian border, who expressed sympathy with those traveling and recounted his own material support for people, nonetheless stressed that these were not Europeans like “we Bosniaks” and needed to be civilized. “They cannot be assimilated,” another asserted. Of course, as Catherine Baker’s *Race and the Yugoslav Region* (2018) makes clear, there are also deeply seated racializing dynamics in the wider region. Still, European Islamophobia has, nonetheless, structured the distinct ways race has come to be articulated in BiH.

Our engagement with local solidarity activism in BiH suggests that local people supporting people on the move – not unlike those in Preševo, Eastern Slavonia, and Serbia – frequently refer to their own refuge experience during the 1990s. Local opposition to the formalization of the route, i.e., to the channeling of migrants and refugees into IOM-managed reception camps, was also articulated upon past refuge experience in the border town of Velika Kladuša. One local volunteer involved in this emergent initiative, an elementary school teacher who described herself as a devout Muslim with strong cultural ties to Turkey, discussed her experience of fleeing “illegally” to Germany during the war. This shared condition of refuge is, therefore, another foundation of joint-agency, especially if we understand refuge-ism in the 1990s as the direct result of the nationalist war against mixed and multiethnic BiH society. The other typical local narration of solidarity with migrants was from volunteers who had been politicized during the dramatic wave of popular uprisings that spread across BiH in February 2014 or in the massive local solidarity response to a wave of disastrous floods in May 2014. In particular, the uprisings were the first significant expression of antinationalist and transethnic political articulation in BiH since the war, with protesters stressing the shared suffering of ordinary citizens at the hands of a corrupt and greedy political class who instrumentalized ethnicity for their own narrow ends (Kurtović 2015; Mujkić 2015).

What is common to both references – the past experience of refuge and newer types of social activism – is their critical relation to the violent imposition of the (European) nation-form onto the complex ethnonational composition of BiH, attributable to its Ottoman and Hapsburg imperial legacies. The competing but isomorphic nationalist political projects caused the war and left a legacy of (partial) territorial separation in BiH along ethnic lines making, what Jasmin Hasanović has characterized as, a “post-conflict state of the colonial imagination designed upon the results of war” (Hasanović 2016). In the same way, a new generation of social activism in BiH has been distinguished by its refusal of ethnonational divisions and its consistent articulation of the solidarity that transcends them. As we have argued,

these anti-hegemonic social practices resonate deeply with previous popular anti-nationalist conceptualizations that informed the specific history of the anti-fascist liberation struggle during WWII, with national liberation councils organized along inclusive multiethnic and grassroots forms of self-government. These forms, in turn, significantly influenced the Yugoslav model of socialism after WWII, including its distinctive model of worker self-management.

What is more, the experience of the anti-fascist liberation struggle and the experience of subjugation in the Ottoman and Austro-Hungarian Empires until the twentieth century, undoubtedly contributed to the anti-colonial sensibilities that led Yugoslavia to be the only European state to participate in the founding of the Non-Aligned Movement. This anti-colonial experience continued to resonate with the route, not only in the experiences like those of the imam in Preševo but with others we met along the route, such as several volunteer translators who were the children of Arabs who settled in Yugoslavia after studying there through Non-Aligned Movement exchanges. Such connections are affirmed by political theorists like Asim Mujkić, whose conceptualization of a “Bosnian paradigm” is inspired by reflections on new social movements in BiH that intersect with struggles for freedom of movement. The Bosnian paradigm highlights traditions and ongoing practices that consistently subvert attempts to impose the nation-form characteristic of European modernity. Mujkić theorizes Bosnia as “*corpus separatum*”, that is, a “body that is not uniform and homogeneous, but made instead of differences in a constant process of differentiation, which might look to integralist eyes like confusing dis-integration, while it is, actually, a qualitatively new aspect of integration” (2019: 10).

CONCLUSION

In narrating the opening of the Balkan Route across the territory of ex-Yugoslavia, we build on the critical tradition of the autonomy of migration, emphasizing the central role of people on the move. Positioning our militant research at the interface between the autonomy of migration and its interactions with local support across ex-Yugoslavia, we found ourselves compelled to attend as well to what we call joint-agency. Joint-agency has implications on the conceptualization of the role of the mobile commons, those self-organized forms of migration infrastructure and knowledge production (Papadopoulus, Tsianos 2013).¹⁵ The self-managed infrastructure of mobility we highlight emerges from both practices of mobility *and* their interactions with local solidarity practices and less tangible local social traditions that condition mobility. But forms of autonomy are, of course, always relational, and they create fields of mutually transformative engagements.

15 We would note that the mobile commons also includes creative reappropriations of institutionalized forms making it sometimes difficult to discern when those forms alternately allow and impede mobility.

We refute claims that the extraordinary opening of the borders of Europe was the result of humanitarian gestures by states rather than of people's mobility struggles. Humanitarian discourses and practices, not least the establishment of the formalized corridor in September of 2015, nonetheless served to eventually reassert control over mobility through the externalization of European border and migration regimes into the borderlands of ex-Yugoslavia. From the perspective of joint-agency, we have therefore recast the history of the formalization and eventual closing of the route through ex-Yugoslavia and its current post-corridor BiH predicament. Whereas Europeanization is so often represented as the cure for all that ails the Balkans, here the process assumes an appropriately dubious and troubling association. The Europeanization of the migrant route, i.e., the imposition of EU control over mobility, resonates with other layers and meanings of Europeanization and alerts us to its persistent colonial character.

For example, the formalization of the route, which was a precondition of subsequent control over unruly mobility, was significantly determined by forms of othering that are embedded within the deeply entrenched colonial prejudice that people in this European borderland are themselves incapable of self-rule. Such prejudice is especially forceful in BiH, in which the processes of formalization of the route circumvented state and local authorities and introduced international organizations of mobility control, such as the IOM, which acts as a *de facto* parallel government. Another meaning and layer of Europeanization that structures the formalization of the migrant route and reestablishment of mobility control – by far the most destructive for ex-Yugoslavia in general and BiH in particular – is the imposition of the nation-form on this ethnically and religiously heterogeneous territory. Its recent reintroduction at the beginning of the 1990s displaced inclusive forms of self-government developed in relation to this heterogeneous society, instead imposing exclusive and subordinate forms of government that are hostile to alterity. The subordination of ex-Yugoslav states through their hierarchical integration into the EU (Razsa, Kurnik 2014) has certainly been instrumental in restoring the EU border and migration regime.

We are writing this conclusion as the (intentionally) poor management¹⁶ of the "migrant crisis" in BiH is producing increasingly hostile local reactions, including the racializing violence of local police in BiH's Una Sana Canton (which includes Bihać and Velika Kladuša). Those incidents decisively reintroduce questions of race in a locality that, due to its nominal exteriority to the colonial history of the Western imperial powers, was supposedly exempt from colonial racialization (Todorova 2009), confirming our previous observations regarding the role of racism when we discussed formalization as an attack on joint-agency. Racialization does have a significant role in European mobility control as reintroduced on the territory of ex-Yugoslavia, both

16 This claim is based on our observations from the field and additionally supported by the conclusion of the report on people on the move in BiH by Ahmetašević and Mlinarević (2019).

as the result of the introduction of nation-form with concomitant internal colonization (Bjelić 2018) or as a product of Islamophobia, which is foundational for European identity. According to Trouillot, the foundational event of 1492 was the Reconquista and expulsion of Muslims (and Jews). Europe, he argues, constituted itself as foundationally Christian on the eve of the modern colonial enterprise (Trouillot 2003). The continuing echoes of this self-definition of Europe significantly affect the response of BiH public authorities to the presence of people on the move. At the same time, the nationalization of BiH Islam reinforces racialization and erodes possibilities of Muslim cosmopolitanism as one (of many) foundations for joint-agency along the route.

The extension of the European border and migration regime on the territory of former Yugoslavia points to and depends upon various dimensions of Europeanization. The instability of this process, on the other hand, reveals the capacity of people on the move to reappropriate conditions of mobility that intersect with silenced local legacies of various struggles against political projects of hegemony based on modern European notions of sovereignty and nationality. The history of the Balkan Route and its current predicament in BiH, therefore, cannot be understood without considering the joint-agency we described across various localities along the Balkan Route across the ex-Yugoslav territory. Furthermore, attention to joint-agency, to these ad hoc collaborations, can offer an opportunity to amplify emergent forms of postcolonial critique that draw upon local anti-hegemonic traditions in various localities around migrant routes (i.e., not only in the Balkans). In this way, migration as a practice of critique of coloniality also contributes to forms of epistemological self-determination and – potentially – to the political self-determination of localities around a variety of migrant routes.

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POVZETEK

REAPROPRIACIJA BALKANSKE POTI: BOJI ZA MOBILNOST IN SO-DELUJOČNOST V BOSNI IN HERCEGOVNI

Andrej KURNIK, Maple RAZSA

Pri pisanju zgodovine odpiranja in zapiranja Balkanske poti je treba upoštevati določujočo vlogo bojev za svobodo gibanja. Ti boji niso izolirani od lokalnega okolja, v katerem se odvijajo, ampak tvorijo svojevrstno ekologijo mobilnosti. Pojem so-delujočnost, s katerim avtorja označujeta vzajemno artikulacijo bojev za mobilnost in lokalnih protihegemonskih tradicij in diskurzov, ponuja specifično perspektivo za pisanje zgodovine begunskih in migrantskih poti, kakršna je Balkanska.

S tega stališča odprtja begunskega koridorja leta 2015 ne moremo razumeti kot humanitarno gesto, ampak kot koncesijo, ki so jo oblastem vsilili boji za svobodo gibanja. Aktivistično raziskovanje nekaterih mejnih lokacij na območju nekdanje Jugoslavije, ki so bile ključne za odprtje begunske poti, je pokazalo, da so boji za svobodo gibanja tvorili so-delujočnost z lokalnimi praksami in s tradicijami nasprotovanja hegemonским političnim projektom, ki slonijo na državni suverenosti in nacionalni formi. Za restavracijo evropskega migracijskega in mejnega režima, ki ga je v času zapiranja koridorja pomembno določala hierarhična vključenost posameznih držav v evropske integracije, je značilno razbijanje te so-delujočnosti na način vzpostavljanja monopola oblasti nad begunsko in migrantsko potjo.

Formalizacija migrantske poti na način spodkopavanja so-delujočnosti v Bosni in Hercegovini izhaja iz kolonialnega predsodka, da so drugi nezmožni samovladanja, islamofobije, vsiljevanja nacionalne forme in rasizma. Nestabilnost restavracije evropskega migracijskega in mejnega režima v BiH pa kaže tudi na vztrajnost avtentičnih ljudskih konceptualizacij skupnega življenja v razmerah različnosti in heterogenosti. Migracija ter begunske in migrantske poti imajo potemtakem potencial, da oživijo lokalne kritike kolonialnosti oblasti in evropeizacije, ki vsiljuje moderne in na nacionalno državo usmerjene konceptualizacije skupnega življenja.

“THERE’S NO PLACE LIKE HOME”: FEMALE EU MIGRANTS IN BELGRADE

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COBISS 1.01

ABSTRACT

“There’s No Place Like Home”: Female EU Migrants in Belgrade

The subject of this paper is the anthropological analysis of narratives of female migrants from the EU who are living in Belgrade. The analysis uses the approaches of “transnationalism from below” and home studies. The paper addresses the question of what is home for EU citizens living outside the EU. The aim is to cast increased light on middle-class migrations from more developed countries to a less developed country. The main results show that the notion of home is intricately linked with the interviewees’ understanding of their transmigrant position and their “bifocal lives”. The study draws attention to educated and skilled EU migrants as a compelling research topic.

KEYWORDS: transnationalism from below, female EU transmigrants, home, bifocal lives, Belgrade

IZVLEČEK

»Dom je samo eden«: Ženske priseljenke iz EU v Beogradu

Tema članka je antropološka analiza pričevanj ženskih priseljenk iz EU, ki živijo v Beogradu. Analiza uporablja dva pristopa – »transnacionalizem od spodaj« in študije pojmovanja doma. Članek odgovarja na vprašanje, kaj državljankam Evropske unije, ki živijo zunaj nje, pomeni dom. Njegov namen je osvetliti migracije srednjega razreda, torej iz bolj razvitih v manj razvite države. Rezultati analize kažejo, da je pojem doma na zapleten način povezan z intervjuvankino percepcijo njenega transmigrantskega statusa in »bifokalnega življenja«. Članek opozarja, da je tudi življenje šolanih in strokovno usposobljenih priseljenk iz držav EU zelo zanimiva raziskovalna tematika.

KLJUČNE BESEDE: transnacionalizem od spodaj, transmigracije žensk iz EU, dom, bifokalna življenja, Beograd

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INTRODUCTION

Migrations, short or long term, internal or external, are becoming part of the life experience of more and more people in the world. As a result, “who is a migrant” is still an open question, while this term has various meanings for a wide variety of people (Koser 2007: 16). Conversely, it is also hard to decide in which cases a person stops being a migrant. Koser mentions that returning home or becoming a citizen of a new country can serve this purpose (2007: 16).

Most migration studies focus on poor and uneducated migrants living in affluent countries. The transnationalism approach was developed and has been used for describing migration from so-called, third world countries to first world countries; such as immigrants in the USA or economic immigrants and guest workers in Western Europe and the EU (Basch et al. 1994; Simsek Çağlar 1994; Portes et al. 1999; Waldinger 2008; Boccagni 2010; Waldinger 2011). Using the example of female migrants in Serbia and their perception of home, I challenge the concept of transmigration. Can the life experiences of affluent migrants in less developed countries be interpreted likewise as transnational? I have based this research on the research of “transnationalism from below” (Guarnizo, Smith 1998) or “micro-levels of transnationalism”; as such, the activities of people in everyday life and their lived experiences, their motivations, and participation in transnational social spaces (Povrzanović Frykman 2008: 151).

Furthermore, I use “home” as an analytical concept. Thus, “home” is defined and interpreted as a residence, “a spatial metaphor for relationships to a variety of places”, and a way of being in the world (Manzo 2003: 56). Several studies (Ahmed et al. 2003; Golob 2009; Al-Ali, Koser 2011: 4; Kostić 2014) answer what is a home for (transnational) migrants, students, and transnational communities living, working, or studying in, or outside, Europe. Generally, however, the focus is on transnational, international, or irregular migrants living in a more developed country. In this respect, I investigate a less researched strand of the anthropology of migration, that of middle-class migration from highly or more developed countries, such as EU countries, to a less developed country, such as Serbia.

While there is a growing interest among domestic anthropologists in researching the Serbian Diaspora (Lukić Krstanović 2014), EU migrants in Serbia are rarely studied (Blagojević 2014; Brujić 2016; 2018). Furthermore, as far as my knowledge goes, scholarly research focusing on middle-class migration, especially in and to Southeast Europe, international skilled and professional migrations in Europe, migrations of EU citizens outside the EU, and skilled female EU migrants, is scarce (see Bönisch Brednich 2002; Ahmed et al. 2003; Favell et al. 2009: 7; Golob 2009; Kofman, Raghuram 2009: 1–2; Kofman 2012; Kostić 2014; Kožar Rosulnik et al. 2016; Čapo, Kelemen 2017: 20–21).

During February and March 2018, I conducted semi-structured, in-depth interviews with eight female citizens from the EU who are living in Belgrade about their lives in Serbia. The main aim of this paper is to cast more light on middle-class,

female, skilled migration, and migrations from well-off countries to a less developed country. Contrary to the theoretical foundations of the transnational approach, these results show that the affluent EU interviewees have rich transnational experiences and use transnational strategies in their lives.

THE MAIN CONCEPTS: TRANSMIGRANTS AND THEIR NOTION OF "HOME"

Within the transnational migration approach, the term "transmigrant" is often discussed and frequently used to describe migrants with transnational experiences. Simply put, transmigrants preserve transnational connections and participate in transnational activities. They "live their lives across national borders", have multiple networks with the country of residence and country of birth through different family, religious and cultural ties, and economic, social, and political activities (Glick Schiller et al. 1995: 48–54). Their "here and there" or "bifocal" lives reveal their "ongoing sense of double belonging" (Vertovec 2004: 974, 975). As a social phenomenon, migrant transnationalism may include two levels (Boccagni 2012: 297):

Identitarian-attitudinal level ("bifocal" identities): economic domain (consumption of home-country goods); political domain (patriotism, long-term nationalism, birth country's citizenship and attachment to political parties in the country of origin, institutions, and news); and socio-cultural domain (long-term nostalgia, social identification with co-nationals abroad or in the motherland, self-identification with the culture, art, folklore of the birth country, "myth of return").

Relational-behavioral level: social domain (relationships and practices which connect both societies); economic domain (sending remittances, money, and gifts or investing in the country of origin, circular international labor migration); political domain (political activism and voting for the birth country, dual citizenship) and socio-cultural domain (visits and regular communication from a distance with family or friends in the home country, participation or support to the motherland or diaspora organizations).

Migrants, especially members of transnational communities, have multiple homes, while they can "feel 'at home' in two or more places (or not feel at home anywhere)" (King 2002: 102). Thus, Brah (1996) emphasizes "the double, triple, or multi-placedness of 'home'" for migrants. Hence, in an attempt to define a home, new approaches to home and migration studies emphasize several aspects. Firstly, there has been a shift from defining "home" as a house. As a socio- and psycho-spatial entity, home engenders social, psychological, and emotive meanings for its owners (Easthope 2004: 134).

Using the example of Latinos in the USA, Waldinger explains the importance of home for transmigrants. The majority of them have a strong, but symbolic and subjective attachment to their respective homelands and their ethnic group. The surveyed people stressed that national ties are important to them, but they rarely plan to move back home (Waldinger 2008: 10–21). “[H]ome’ has commonly been linked to ‘family’, ‘community’ or ‘homeland/nation’” (Al-Ali, Koser 2011: 6). On the other hand, over time, the meaning of home can change or be attached to other places. Waldinger (2008: 24–25) notices that the majority of respondents plan to stay in the USA and that, after several years, fewer people connect their countries of birth with the notion of “‘real homeland.’” It is similar for their offspring, especially bilingual children, who likewise do not plan to move back nor think of their countries of origin or their parents’ origin as their “real home” (Waldinger 2008: 22). Therefore, in the following sections, I analyze the narratives of women living in Belgrade, focusing on their understanding of themselves as migrants and where they feel at home.

FEMALE CITIZENS FROM THE EU IN BELGRADE: RESEARCH RESULTS

I acknowledge the importance of studying migration from the perspective of focusing on everyday life and peoples’ experiences through the analysis of migrants’ narratives (Bönisch Brednich 2002: 64; Kožar Rosulnik 2016: 31). I conducted in-depth, semi-structured interviews with eight women originating from Austria, Estonia, Finland, France, Greece, Germany, Slovenia, and the UK, aged between 34 and 67 years at the time of the interviews.¹ Six of them are married to Serbs, one is divorced from a Serb, and one is in a relationship with a Serb. Although the majority mentioned “family and/or love reasons” for their moving or coming to Belgrade, two came mainly for economic reasons and later met their future Serbian husbands. In other words, “love, economic, and lifestyle migrations” are intertwined. All interlocutors speak Serbian fluently, and socialize and spend their free time mainly with their Serbian friends. Except for one informant, all the women are highly educated.

Simone is a German living in Belgrade since 1999. She lived in Germany, England, and Hungary before coming to Serbia to work. Simone is now working primarily as a German teacher. She travels a lot with her husband and very often visits her family and friends in Germany. Simone feels like a visitor and an observer in both Serbia and Germany.

Of course, I’m a foreigner. Of course, I’m not a Serb. I was brought up in the German way, and I notice abroad and now in Serbia, how German I am. Despite that, I learn every day, and I believe that my German upbringing more and more fits the Serbian

1 Pen names were used in this paper. Except for two interviews, which were held in German (with Simone) and English (with Florence), the others were in Serbian.

circumstances. [...] I like this observing position. Here, I feel like I do in Germany, not foreign, but distanced and observant.

In one of our usual conversations, Simone once explained to me her self-identification: "I used to say that I'm a migrant from the EU [laughs]."

Florence is a British pensioner who settled in 2002 in Serbia. During the 1980s, she worked for a Yugoslav firm in London and visited and worked in Yugoslavia. Although she is now officially retired, she occasionally works as an English teacher. Florence sees herself neither as a migrant in Serbia nor as a Serbian citizen. "I just feel like I'm somebody who lives here, but who doesn't have a voice here. So, perhaps I should shut up, you know [laughs]."

Although she does not have Serbian citizenship, she does not feel like a British citizen either. Florence thinks that British immigration policies and politics are devaluing British citizenship, and she eventually started to dislike living in the UK. "I feel British citizens are treated by their own country as very second class."

Klaudia is an Austrian lawyer who moved with her family to Belgrade in 2002 due to her husband's job. Currently, Klaudia does not have a permanent job but works on several international projects. She feels like a foreigner in Serbia, and likewise, like a foreigner in Austria. However, it is perhaps a different mode of "being foreign"; she feels like an Austrian who does not belong to Austria anymore. She is the only interviewee to have attained Serbian citizenship. However, it does not make her Serbian. Citizenship facilitates her residence in Serbia, allows her to vote in Serbia, "to do at least something [for improving the political situation in Serbia]" and to travel to Russia without a visa. "I still feel like a foreigner here because being a foreigner here is not a bad thing. (...) Nobody has problems with me being here [in Serbia], they [the Serbs] even like foreigners."

In Austria, she notices many things which she did not see when she was living there. For instance, she criticizes the practice of showing off and buying expensive goods in her hometown.

When I go for a visit, then I notice that everyone has the most expensive coffee machine; everyone has a pool [...] and then you are under stress that you have to earn that money [to pay for them]. I mean, you have debts because you thought that your neighbors needed to see that you have all that. [...] of course, that's stupid, but you probably notice that only when you're out of the system.

She finds her observing position and the opportunity to see both sides as advantageous and a "possibility to have the best of both sides".

Alex is French and works in Belgrade as a dance instructor. In 2003, she and her family moved to Serbia because of her husband's job. As a child, Alex lived in France, Venezuela, Senegal, and Morocco. As she explains, she is accustomed to moving and is not nostalgic towards places. For her, family and friends are the only important

factor. When asked about her perception of her status, Alex explained that she feels like “[...] a welcomed extraterrestrial, here and there. [...] I like to observe, I always observe. So, I never feel like I am 100% involved, enough, of course, to have friends and so, I’m more engaged in individual relationships than in society as such.”

Anita is a Finnish woman, who, in 2002, because of her husband’s job moved to Budapest and after that to Belgrade where she dedicated her time to raising her children. As she recently divorced and is having problems finding a financially sustainable job in Serbia, she plans to go back to her hometown in Finland. Like other informants, Anita likes Serbian friendliness and communicativeness. As she explains, it is uncommon for Finnish people who do not know each other to start a conversation in the market, shops, etc. However, she always felt like she did not entirely belong in Serbia. “I even liked that, since the political situation here is not the best. I was always thinking ‘all right, this is not my country’, but it is of my children. Somehow, I never applied to be a Serb; I wanted to remain only Finnish. I felt I wasn’t, let my children be both, but for me, it is enough to be only Finnish [laughs].”

Anneli is an Estonian musician in a relationship with a Serb. At the end of 2016, during her first tourist visit to Belgrade, she unintentionally found a temporary professional engagement in Belgrade. Before coming to Belgrade, she had either studied or worked in Tallinn, Saint Petersburg, Modena, Manchester, and lastly, London. She explains: “I came for work, stayed because of myself. There is a great chance that I will return to Estonia because of my roots!”

Anneli feels neither like a migrant nor a foreigner but “[...] really good. Until now, this is the country [other than her own] that has accepted me the best”.

Maja is a Slovenian photographer who has traveled throughout the world. At the end of 2015, she quit her well-paid job in Ljubljana and came to Belgrade to be in a relationship with a Serb whom she briefly knew from before. Currently, she is unemployed, although she occasionally works as a photographer. Maja’s foreign status does not influence her well-being. When asked whether she feels like a migrant or a foreigner, Maja promptly replied: “I feel more or less a local here. Perhaps sometimes, because of the language, someone notices [that I’m not from here]. I have an accent; I can’t hide it!”

Maria is a Greek who runs an NGO in Belgrade. In 2004, she married a Serb, and they spent the following year in England during her graduate studies. Afterward, they came back to live in Serbia, but they visit Greece frequently and work during the summer season in Majorca. Maria, likewise, does not define her status or identity within the scope of migrants’ or foreigners’ experiences. “I feel here at home; I don’t feel anything special. [...] I feel that people here respect me because I come from Greece and I feel comfortable here, I like to live here.”

Although Anneli, Klaudia, and Alex followed their husbands by migrating to Serbia, they first agreed together to see if they would like it there. After her divorce, Anita decided to return, taking her younger sons with her to finish their education in Finland. Maja came to Serbia because she did not want to separate her future

husband from his child (from a first marriage). Their migration paths are connected with their family and decisions on mutual life or work. All the women have family and friends in their countries of origin with whom they are in contact and whom they visit. On the other hand, the intensity and scope of relationships and connections vary significantly and change over time among the interlocutors. For instance, when Simone came to Serbia at the end of the last century, she received her salary on her German bank account. However, in that period, there were no ATMs in Serbia, so occasionally she had to fly back to Germany to withdraw her money. Alex did not own any real estate in France but has recently bought a plot of land upon which it is currently illegal to build anything. This lot connects her to France because she must invest both time and energy to obtain the necessary permits and legal documents to enable possible construction. Maja rents out her apartment in Slovenia, and Klaudia owns an apartment in Austria. Florence receives her British pension. Anita is an active member of the Finnish-Serbian Society, and Maja obtained her first job in Serbia thanks to the Slovenian Society in Belgrade. The four women who were pregnant in Serbia wanted to deliver their babies in their countries of birth because, according to them, the health system functions better, and they felt more secure there.

In the following pages, I will suggest that the life experiences of female EU citizens living in Belgrade can be interpreted in the light of the transmigration phenomenon.

FEMALE EU MIGRANTS AS TRANSMIGRANTS

There is a broad assumption that transmigrants and migrants, in general, are from poorer countries moving to wealthier countries (see Chambers 1994). The middle-class, educated women from the EU countries living in Serbia do not fit into this traditional model of transmigrants. All interlocutors acknowledge that in Serbia, they have personal and family lives of a higher quality than they either had or would have in the EU countries (Brujić 2018). This perception is even true for women who have smaller personal incomes in Serbia than they had in the EU, as is the case for Maja or Anneli. Only Anita must return to Finland, as she no longer has a stable source of income. However, she admits that "it is not at all easy to leave this country. This is a very emotional country [...], all my friends who have come to visit have been thrilled." Secondly, apart from family and friendship ties, my interviewees do not sustain regular institutional, religious, political, or cultural ties with their countries of origin or with Serbia. They do not participate in economic transactions such as sending remittances, gifts, etc. Only due to her friend's plea, Klaudia recently became a member of a small theatre in Austria and paid an annual fee to help this theatre survive. Nonetheless, she will not be involved in its activities because she lives in Serbia. Her children were members of a mountain club in Austria in order to attend its summer camp. These and similar cross-border activities of my interlocutors and their family members lack the regularity and routine involvement which

are crucial for describing someone as a transmigrant (Portes et al. 1999: 225). King et al. (2017 [2013]: 4–5) observe that transmigrants influence the economic, social, cultural, and human rights spheres of their countries of origin. On the other hand, unlike transmigrants from poorer countries living in highly developed ones, these women do not influence development in their countries of birth or their local communities, nor does their emigration trigger new movements to Serbia. In other words, they do not closely build their personal and national identities upon transnational or translocal social ties.² They emphasize the connections with their partners, friends (and children) in Serbia, but have transnational contacts with friends and family abroad as well.

THE NOTIONS OF HOME AMONG FEMALE EU TRANSMIGRANTS IN BELGRADE

Mallett (2004), Golob (2009: 67, 71, 73) and Al-Ali, Koser (2011: 6) sum up the most relevant socio-cultural notions of home, stressing its multidimensional, mobile, pluri- or translocal, and deterritorialized nature: home as a (childhood or family) house; homeland, home city or town; a family; haven or refuge; expression of self or identity; a constellation of relationships; a signifier of gender and as an experience of journeying or experience of being-at-home. Furthermore, movement is acknowledged as one of the essential elements for making and re-making individual identity and understanding socio-cultural reality. Therefore, as Rapport and Dawson sum up, “one can be at home in movement”, but they also stress that “movement can be one’s very home” (1998: 27). My research supports the view that home is not just a house. For example, Alex relates the notion of “home” with both France and Serbia. However, “home” for her is not a fixed place. It is not a place at all.

Home is where my beloved people are. Like for gypsies, home is in movement. [...] Everywhere I feel at home, and everywhere *en passant*. It is a strange feeling. I don't feel that I belong, but I feel OK, I'm good everywhere. [...] When I'm going to N. [hometown in France], I'm like a tourist. Or I go to a friend's or take Airbnb or something. I cannot go to my mom; nobody has enough space for us all.

In her case, “home” can be understood as journeying. As Mallett (2004: 78) explains: “Journeys away from home, for no matter how trivial or routine a purpose, are thought to constitute both home and traveler.”

2 In his research on Ecuadorians in Italy, Boccagni (2010: 186) defines this type of ties as “any social relationship and practice ‘at distance’ (along with the identity orientations they build on) that allows immigrants to exert relevant influence on the social lives of those left behind and, vice versa, that allows the latter to impact the life course of the former in significant ways”.

Maria likes her, as she calls it, "nomadic life" because she has been traveling since her early 20s. This lifestyle denotes her perception of home. "Everywhere can be my home. I don't know. At this moment, here is my home [Belgrade], but specifically in A. [the name of the hostel they own in Belgrade], because we have moved there and live there now. It's so beautiful and ours."

This thinking is in line with the conclusion of Ahmed et al. (2003: 1 – italic in original) that "[b]eing grounded is not necessarily about being fixed; being mobile is not necessarily about being detached." "Home" does not necessarily have to have one meaning. For Maria, home is also constituted in a journey. Moreover, she sees the dwelling itself (their hostel) as her home. In many cases, as such is this, a "physically and territorially bounded place in a certain location, where daily routines and family relations are embedded in a fixed environment" conceives a home (Golob 2009: 66–67).

Florence is well aware of the importance of migration for her family and her family history but emphasizes that "you don't have to live in your home country to feel at home". For her, home means "where I live and getting it to my liking" by arranging things. In that sense, a home as "a state of being" and Florence's lived experience of "being-at-home (in the world)" is meaningful (Mallett 2004: 79).

I feel as much at home here, usually, as I do in the UK. I feel somewhat at home in Holland [where she has relatives as well]. Umm, I haven't spent long periods in other parts of the world to be able to judge. But, you see, I take into consideration the fact that all my father's family came from the Russian Empire and, except for my grandfather and my grandmother, most of them re-emigrated, so, consequently, how can I feel at home anywhere? I'm used to this idea of movement. [...] I only feel at home in my own home, so in other words, wherever I happen to be living, I've made it how I wanted it.

Contrary to Waldinger's example of Latinos in the USA (2008), Klaudia and Alex accept the fact that they might be moving back to their countries of origin once their children enroll in universities there. At the moment, Klaudia perceives home as being more in Belgrade. On the other hand, when her children finish school and when she gets older, she would like to go back to her hometown in Austria, where she still has family and friends, to where her heartstrings are pulling her.

Anita and Anneli plan to return to Finland and Estonia, respectively. Anita cannot find a suitable job in Belgrade since her divorce, and Anneli does not have a permanent job in Belgrade. Perhaps these are some of the reasons why, out of all the interlocutors, these two are the most attached to their "homes" in their birth countries.

Anita feels at home in Serbia, too, and is attached to various places in Serbia. Nonetheless, currently for her, "home" represents a house in her Finnish hometown where her 95-year-old grandfather lives and where she plans to return. Because of

her current circumstances, her future re-migration can be interpreted as “an act of empowerment, taking control over one’s life” (Kožar Rosulnik 2016: 39).

When Anneli moved to Belgrade from London, she stopped thinking about where her home lie. For several months, she was living between Serbia and England, and this was too confusing for her. However, she distinguishes “two” homes – home as a place where she currently lives, and home in Estonia where her mother lives and to where she will probably return sometime.

It was always “Here is my home. No, no, no. My home is here.” And there was always a problem, “I don’t have a home, do I? Here is good,” and then you move again. “All right, am I leaving or returning?” [...] and when the people asked me, “Where do you live?” “I live in a suitcase.” [...] For me, it was the only objective truth, but I realized that I make a victim of myself “Oh, poor me, I live in a suitcase,” a woman without a house. But I do have a house in Estonia. [...] We have built a house there, that is my land, my mother, my house, I can return there whenever I want. So, I have a house, but I also have it somewhere else than where I currently live.

King (2002: 102) observes that the ideas of “‘home, ‘away’ and ‘abroad’” are blurred. He considers that for many migrants, “a home” is a place set in the past. For instance, for Klaudia, Anneli, and Anita, home is related to their homelands, hometowns, and their birth families. As Mallett (2004: 74) explains, home can refer to the family house of childhood.

Maja believes that home is where your heart is, and her heart is now in Belgrade. “For me, home means some nice flowers in the apartment, some fresh tulips or now mimosa, some small things. [...] I like to decorate so that I can feel comfortable [...], I want to feel some good energy [in the apartment].”

Her vision of home is in line with popular ideas, often criticized in the literature as simplistic, of home as a feminine, private and familial space, a haven for a woman (Mallett 2004: 71, 74–77).

Generally, many migrants miss food from home and, thus, often, food likewise migrates to new settlements. In this respect, food from home in a new environment has a vital role in enacting the “stability of home through the very mobility of food” (Petridou 2001: 102). Some interlocutors even bring certain specific foods from their countries of origin which they cannot find here, such as Baltic bread; food that in Serbia they perceive to be of poorer quality or is too expensive, such as cheese from Slovenia, Finland, and Austria, breakfast cereals from Finland or Germany, and olive oil from Greece. Maja, for instance, feels nostalgic for Slovenia, although she does not plan to move back. For her, Slovenian food evokes homesickness and childhood memories, especially towards the place where she grew up. “Here, for example, you cannot buy bouillon cubes. In Slovenia, I almost never ate them, but now [I ask people to] bring me some.”

On the other hand, Florence does not miss food from Britain, and she has adapted her needs to Serbian conditions.

Okay, you can't find jelly or Bird's custard, but I can live without it, quite easily. [...] Umm, every week, there's something new arriving in the supermarkets. So, no, maybe not Christmas pudding, if I wanted to make it myself. But there's always somebody who's going to and fro who'd bring you, if you're really in need, some tea bags or something. No, but I don't feel I've got to go back to England to buy them [laughs].

All of the interlocutors successfully combine aspects of identitarian-attitudinal and relational-behavioral levels (Boccagni 2012), such as consumption of home-country goods, possession of birth citizenship, Serbian language competency, as well as regular visits and communication from a distance, which allow them to participate in long-term transmigration. Moreover, these possibilities enable them to enjoy the easy-going Serbian perspective on life (having more free time for friends and family), and be adapted to various Serbian conditions (working on the black, having personal connections in order to get something done in the public sphere (Srb. *imati vezu*), living near a businessman with a dubious background) (Brujić 2018). However, a certain distance from both societies exists, as sometimes they have the option to pay for private services if they are dissatisfied with the quality of Serbian state ones or leave Serbia and use their home country services instead (e.g., giving birth, private or state education); although the ability to use state services may also depend on the country of origin.

Concerning their transmigrant experiences, researchers of guest workers' transnational practices in Europe point out that some of them describe themselves as "people without a state" (Čapo Žmegač 2007: 286). As Simsek Çaglar (1994: 90–98) explains, using the example of Turks living and working in Germany, their "double bindness" makes them "betwixt and between" and "out of place" both in Germany and Turkey. Finally, Grillo (2007: 201), in a similar vein, notes that transmigrants' liminal experiences may be depicted as a state of "in-betweenness". More importantly, he warns that transmigrants are not a homogenous group. Transmigrants, according to Grillo, could be, for example, differentiated, according to their class, generation, and gender (2007: 212–213). Grillo explains that not only less educated third-world country nationals are part of the transmigration matrix.

However, equipped with definitions, it is easy to forget that migrants change plans (or are forced to change them, the same as Anita), try not to make plans (as Alex), or lean on their children's plans (like Klaudia, for instance). Thus, definitions and labels can either freeze a person's migration experience or exclude someone who does not fit into it.

CONCLUDING REMARKS

In this paper, I have demonstrated that some traits of transnational lives and practices characterize some female EU migrants in Belgrade. The most important ones are their bifocal lives and the “in-between” state, dual citizenship, and, most importantly, social relations with both societies. However, in some cases, it would be more precise to say that their transnational lives are “neither here, nor there”. As Salih (2011: 52) notes, transnational experiences may create “belonging to ‘neither’ place”.

Not only are transmigrants international migrants, but international migrants are in the majority of cases transmigrants (see Waldinger 2008: 1–7; 2011: 4–10); and such is the case of educated women from EU countries living in Serbia who should be recognized as part of transmigration processes as well. As King (2002: 89–90) points out, not all migrants in Europe are poor, desperate, uneducated, uprooted, marginal, and coming from the so-called third world countries. Nevertheless, they are more frequently observed and researched in academia.

Moreover, I have shown that the meaning of home is intricately linked with women’s understanding of their migrant position because it correlates with the notion of “bifocal lives”. Recent migration studies emphasize that for many transmigrants, home is not a place set in one or the other country, but includes several homes (Ahmed et al. 2003: 4; Golob 2009; Al-Ali, Koser 2011). Home can reflect national, cultural, and social belongings or one’s sense of self and form part of self-identification (Al-Ali, Koser 2011: 7).

This paper represents a preliminary notion of the meaning of home among affluent female migrants in Serbia and is part of a wider research study. In some other article(s) it would be essential to give answers to several other issues, such as memory, identity, and the perception of home among female EU migrants,³ EU citizenship and their vision of the EU as a common “European home”; elaboration of female migrations and the inclusion of the perspective of male migrants as well.

In addition, home is not only a place in space, but a place in time as examples of these women’s narrative show: in the past (in memories of family and family home for Anita and Anneli); in the future (in planning to return to their home countries for Klau-dia, Anneli, and Anita); and in the present, in Serbia (for all the interlocutors), where they feel they belong at the moment. As a contested site, home is “multi-located” (Armbruster 2011: 32). Moreover, it is also multi-temporal as, according to my interlocutors’ experiences, *there’s no place like home*.

3 This topic is discussed in a still unpublished manuscript “Domestic objects and the sense of home among EU women in Belgrade”.

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POVZETEK

»DOM JE SAMO EDEN«: ŽENSKÉ PRISELJENKE IZ EU V BEOGRADU Marija BRUJIĆ

Članek, ki temelji na »transnacionalizmu od spodaj«, študijah pojma doma in poglobljenih polstrukturiranih intervjujih z državljkami Evropske unije, živečimi v Beogradu, raziskuje pojmovanje doma pri (transnacionalnih) migrantkah. Analizira pričevanja žensk iz Avstrije, Estonije, Finske, Francije, Slovenije, Grčije, Nemčije in Združenega kraljestva, ki so se v Srbijo (Beograd) preselile predvsem iz »družinskih oziroma ljubezenskih razlogov«. Poudarek je na njihovi samoidentifikaciji in samo-percepciji njihovega migrantskega statusa v Srbiji, ki jo zaznamuje visoka stopnja »bega možganov« v države EU. Namen članka je večplasten: opozoriti na pomen raziskav življenja državljanov EU zunaj EU, podrobneje raziskati migrantke – strokovno usposobljene pripadnice srednjega razreda, kakor tudi migracije iz bolj razvitih v manj razvite države, navsezadnje pa tudi osvetliti pojem doma za državljanke EU, ki živijo zunaj nje. Avtorica dokazuje, da imajo tudi te ženske nekatere značilnosti transnacionalnih življenj in praks, predvsem »bifokalna življenja«, »vmesno stanje«, dvojno državljanstvo in, kar je še najpomembnejše, socialne stike z obema državama. V tem smislu je dom pojmovan kot multidimenzionalen, gibljiv, pluri- ali translokalen in deteritorializiran prostor. Sodeč po pričevanjih dom ni prostor v prostoru, pač pa prostor v času: v preteklosti (v spominih na družino in družinski dom), v prihodnosti (v načrtovanju vrnitve v rodno državo) in v sedanosti (Srbija), kamor po svojih občutkih intervjuvanke trenutno sodijo.

TRADE UNIONS, MIGRANT WORKERS, AND RACIAL DISCRIMINATION IN ITALY IN TIMES OF ECONOMIC CRISIS

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COBISS 1.01

ABSTRACT

Trade Unions, Migrant Workers, and Racial Discrimination in Italy in Times of Economic Crisis

Trade unions have a crucial role in the social integration processes of migrants. Nevertheless, some aspects of this relationship are still relatively unexplored, particularly that of the relationship between trade unions and racism and that of the trade unions' fight against racial discrimination. This paper aims to investigate the still partially unexplored link between Italian trade unions and racial discrimination within the framework of the 2008 economic crisis. Through the narratives of stakeholders, trade unions, and migrant workers, the author provides an in-depth look at the efforts of Italian trade unions to fight discrimination and examines the main barriers that prevent migrants from being involved in unions.

KEYWORDS: migrant workers, trade union, racism, discrimination, economic crisis

IZVLEČEK

Sindikati, delavci migranti in rasna diskriminacija v Italiji v času ekonomske krize

V procesih družbene integracije migrantov imajo ključno vlogo sindikati. Kljub temu so nekateri vidiki tega odnosa še vedno relativno neraziskani, še zlasti odnos sindikatov do rasizma in njihov boj proti rasni diskriminaciji. Avtor v članku obravnava še vedno slabo raziskano povezavo med italijanskimi sindikati in rasno diskriminacijo v času ekonomske krize leta 2008. Na podlagi pričevanj deležnikov, sindikatov in delavcev migrantov ponuja poglobljen vpogled v prizadevanja italijanskih sindikatov za odpravo diskriminacije, hkrati pa analizira pogloblitve ovire, ki delavcem migrantom preprečujejo vstop v sindikate.

KLJUČNE BESEDE: delavci migranti, sindikati, rasizem, diskriminacija, ekonomska kriza

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INTRODUCTION

Trade union organizations have played a crucial role in as well as had a direct impact on the processes of social cohesion and integration in Italy.¹ Nevertheless, a few aspects of this relationship are still relatively unexplored (Ambrosini, Frangi 2015). The first publications on this topic date to the 1990s and early 2000s. Namely, the reports of the Institute for Economic and Social Research (Ires) (Bernardotti, Mottura 2003; Leonardi, Mottura 2002; Pugliese 2000), which outline certain general trends based on mainly quantitative analyses; and the pioneering works of some scholars (Caccavo 2000), which delve into the contribution of trade unions in the struggle for recognition carried out by migrants in Italy. We can recall some pioneering contributions that first shed light on the early contacts between trade unions and migrants (CSER, 1986; Treves 1989) and observed the increasing presence of migrants in Italy as an occasion to reflect upon the new action domains that labor transformations offered to workers' organizations (Mottura *et al.* 2010). Subsequently, a new branch of studies developed (Carrera, Galossi 2014), aimed at deepening the exchanges and mutual contributions which had started, ever more intensely, to occur between trade unions and migrants in Italy (Sospiro 2003; Fiom-Cgil 2008; Galossi 2012).

The raging 2008 crisis led several scholars to delve into its repercussions on the socio-material conditions of migrants (Kanduč, Bučar Ručman 2016). A large number of sociological studies have thus revealed how, in Italy, the consequences of the problematic structural economic situation have affected and are particularly affecting migrant workers (Coletto, Guglielmi 2013; Fullin, Reyneri 2013; Reyneri 2010). At the same time, authors focusing on the relationship between trade unions and migration have also observed a link with the 2008 global economic crisis and analyzed the answers of trade unions against their consequences on migrant workers (Carrera, Galossi 2014) and their union membership (Caruso 2011). According to some authors, with the economic crisis, a worsening of racist and discriminatory (Basso 2010) practices could be observed, thus aggravating the already tenuous working

1 The three main trade unions in Italy are the so-called "confederal unions": Cgil, Cisl, and Uil. Cgil (Italian General Confederation of Labor) is the oldest Italian union. Historically close to socialist thought, two strong internal components, a communist one and a socialist one, characterize it. It is the largest organization on the Italian trade union scene and the most conflictual one, even if, over the years, it has lost this latter characteristic. Cisl (Italian Confederation of Workers' Unions) was born from the split of some Christian components of the Cgil, on the American push to create a moderate and pro-governmental union, in opposition to Cgil. With its strong social-democratic and reformist character, the birth of Uil (Italian Labor Union) took place in stages and is the result of both the splits generated by the unitary Cgil and the political shuffling within Italian political parties in the first republican post-war period, particularly in the socialist area. Over the years, several independent unions (e.g., SiCobas, ADLCobas, Cub, Usb, Usi-Ait ...) have sprung up alongside the mainstream unions, sometimes referring to the bodies established within the workers and student movements in the 1970s. Over time, despite their small size, they have been characterized by a particular conflictual and heterogeneous form of struggle, intercepting many workers who are disappointed by the excessive tendency towards moderation in the mainstream trade unions.

(Ferrero, Perocco 2011) and social conditions of migrants. According to other scholars (Mometti, Ricciardi 2011), though, in front of such a context, the major trade unions have taken on an ambiguous approach, reducing their action, at most, to generic service centers for equally generic users.

A few authors have focused explicitly on the relationship between migrant labor and trade unions. Giovanni Mottura has authored and co-authored (Mottura, Pinto 1996; Mottura *et al.* 2010) several essays that highlight the trends and relevance of migrants within Cgil members as well as co-authored several Ires reports (Bernardotti, Mottura 2003; Leonardi, Mottura 2002). Pietro Basso (2006) – analyzing the three main trade unions, especially Cgil and Cisl – highlights the increasing participation of migrants and describes the quantitative change between the 1990s and the 2000s in terms of the number of members, leading the trade unions to become the first and foremost “multi-racial” and multinational organizations in Italy (Basso 2004). A qualitative change also took place, as initially, migrants only approached trade unions with welfare-related demands. With the consolidation of their presence in the workplace and the increase in their awareness, they started to participate actively in trade union life and, often, took up a representative role for natives as well. At the same time, the Author highlights the under-representation of migrants in governing bodies, their almost complete absence in secretariats, and the lack of a structured action to counter discriminations in the workplace. Indeed, more recently, trade unions have not only reduced the involvement of migrant workers within their structures but have also lowered the protection of their rights to the extent that more or less explicit discrimination events are emerging within their ranks.

While the relationship between trade unions and migration is still a barely analyzed issue in Italy, even less analyzed are the relationship between trade unions and racism and the countering of ethnic and racial discrimination by trade unions. This contribution, thus, aims at examining the still unexplored link between trade unions and racial discrimination in Italy during the economic crisis. By delving into the scope and effectiveness of the efforts of Italian trade unions in countering discrimination since 2008, it endeavors to assess to what extent migrants are represented within trade unions structures and to analyze which structures prevent migrant workers from accessing the support of trade unions and getting more involved in that context.

Methods

This article is the result of a more extensive research project entitled “Trade Unions, Economic Change and Active Inclusion of Migrant Workers” (Team), funded by the European Commission and conducted within a comparative approach in six European Union countries: Italy, Spain, Poland, Belgium, United Kingdom, Austria.

Forty-five in-depth interviews were conducted: ten with key informants; fifteen with trade unionists; twenty with unionized migrant workers. The interviews were

collected, recorded, and transcribed in Italian and translated into English for this article by the author, who holds the archives.

The fieldwork has been carried out in several Italian cities, especially in northern ones (Bologna, Brescia, La Spezia, Milan, Padua, Venice, Verona, Vicenza), but also in the center (Florence, Rome) and the south (Naples).

AMBIGUITY AND FRAGMENTATION

Analyzing the key informants' statements shows that trade unions rarely tackle the topic of racial discrimination. Likewise, even the very same workers' organizations are not immune to discrimination; such practices and attitudes are so widespread and rooted in the Italian society that they have "contaminated" trade unions. The intensification of institutional racism in Italy in recent years (Basso 2010) has entailed a sort of "reflected *inertia*", a penetration of racism even within trade unions.

We also notice the severe lack of an organic trade union policy to counter discrimination. Countering actions, when present, are described as the result of the inclinations, willingness, and commitment of single operators and officials in the different local branches. Often, the most dedicated actors are those in charge of migration desks who, voluntarily, go beyond the bureaucratic execution of administrative procedures, thus becoming the line of contrast against the discrimination within each trade union branch. Such a scenario has not only jeopardized countering actions and led to a highly varied awareness, but has also implicitly delegated the topic of discrimination to the officials "dealing with migrants".

The representatives of migrant associations underline the lack of policies against discrimination. In contrast, other stakeholders underline a specific commitment by trade unions – though limited to the local level and with differences among trade unions and categories. Moreover, trade unions seem to counter discrimination mainly with labor law; anti-discrimination norms and tools, which would be a useful instrument (Cillo, Della Puppa 2011), are little known and barely used. Furthermore, as local administrations usually entrust the administrative paperwork (residence permits, family reunification, etc.) to trade unions through conventions, trade unions are influenced by such institutional bodies – from which they obtain funds – and their political views. The ambiguity of trade unions increases when they must adopt actions to counter discrimination practices carried out by the local administrations that outsource such services (Cillo, Perocco 2014): "Trade unions always have plenty of conventions, if they were to report discrimination by the Municipality, they could be blackmailed: 'We'll cancel the convention', trade unions manage all migration offices through conventions with the Municipality." (Key informants; migrant association representative)

Without an organic policy against discrimination, the heterogeneity marking the stances and practices of trade unions on racial discrimination can be connected

to the importance of single operators who – with different sensitivities and tools – empirically create their anti-discrimination policy and to the conflict of interests between union organizations and political and economic institutions in different local contexts.

Such limitations can be related to the insufficient presence of migrants in the governing bodies of union organizations. On this topic, the interviewees confirm the literature data on the under-representation of migrants in intermediate and upper levels (Basso 2004). In shedding light on the trade unions' delay in the awareness of racial discrimination, the interviewees underline that migrant unionists – when there are any – are mostly in the lower levels of representation. Indeed, this positions them at the margins of the debate on the organization's policy lines and does not allow them to have an impact on concrete actions. Furthermore, the inclusion process of migrants within representation bodies sometimes seems aimed at recruiting new members of foreign origin or at expressing an "instrumental multicultural" stance. Thus, migrant unionists are considered as the representatives of migrant workers, that is, as the interlocutors for their fellow nationals and not for the interests of workers in general. On the one hand, migrant unionists are considered more "symbolic" than substantial, and, on the other hand, they are seen as a way to attract others, given their migrant status, their roles as charismatic "community leaders", or as leaders of mono-national associations working on the territory. A function incorporated in somatic traits, as some interviewees hint at: "One limitation is that foreigners shall represent foreigners, as if it were a vested interest. They say: 'There are migrants, someone shall represent them, Italians don't do it well, so it is better if a foreigner represents them.'" (Key informants; third sector representative)

The fragmentation marking the anti-discrimination action of trade unions prevents the perception of an overall dimension and, also, makes it harder to identify differences between the various organizations. Yet, it is possible to identify a less critical and hostile attitude by Cisl and Uil than by Cgil, which is more active (especially in some sectors, historically more determined to fight and with a more substantial presence of migrant members, such as metalworkers or construction workers). At the same time, independent unions are quite active in placing migrants as sector representatives. Moreover, the stances of the different unions seem to differ also in the political choices on migration at the national level: some organizations have taken a critical stance on governmental choices; others either did not comment or even supported the most restrictive measures, enabling the government to proceed without obstacles, clashing with the trade unions that had opposed those measures (Cillo, Perocco 2014). In general, though, with the economic crisis, such stances have receded in terms of contents, forms of struggle applied, and ways to involve workers (Mometti, Ricciardi 2011). Specifically, migration policies were worsened by the first so-called "Security package"² (Ferrero 2010) which has further highlighted the

2 Law 94/09.

differences among trade unions and the overall retreat in their stances. Indeed, on such provisions, Cisl and Uil have supported the government of the time, enabling a “lowering in the threshold of rights, justifying this choice with the economic crisis leading to an increase in unemployment and to the closure of factories” (Unionist, Cgil, Rome). Just like the independent trade unions, Cgil presented critical stances that were either confined to the public and political debate without ever transforming into a “strategy to raise the awareness of the bottom layers of the trade unions to revive the defense of migrant workers’ rights as a defense of the rights of all workers” (Cillo, Perocco 2014: 370) or downsized to recreational or merely symbolic actions. A central element to explain, in part, the poor determination of trade unions in countering racial discrimination lies in their alignment with – or at least in the lack of willingness to struggle against – governmental policies, in the name of a generic “national interest” which has become a priority over what their charters say.

Similar to the actions countering discrimination practices, discontinuity and heterogeneity mark the collaborations with agencies and bodies fighting discrimination³. Some local branches regularly collaborate with governmental bodies and participate in joint actions against discrimination carried out by non-institutional actors. In contrast, others prefer not to collaborate with governmental bodies, as it would mean admitting their defeat in defending workers.

Nevertheless, there are not many services to advise, support, and assist workers affected by racial discrimination. Some interviewees even underline how trade unions run the risk of mirroring inequalities at the national level: “Redundancy always affects foreigners first. [...] It happens like this, I mean, for redundancy it is not the employer deciding alone, sometimes they actually agree with trade unions.” (Key informants; migrant association representative)

The actions to counter racial discrimination show the contradictions of trade unions. Despite the limitations and heterogeneity of their commitment, migrant workers express a high level of trust towards them and great expectations for change, as they are identified as a collective actor able to offer a certain degree of protection and as the main structure which, in the context of migration, has always kept the doors open (Basso 2004). On the other hand, though, they seem to attach priority to national interests, and, on migration, they run the risk of being reduced to a mere supplier of tax and administration services. Yet, a large share of migrant workers continues to become members, as trade unions are still a place for socialization and solidarity among workers, and such membership can only bring about new momentum towards change within the trade union itself.

3 Such as the National Office against Racial Discrimination.

ISSUES AND DEMANDS FOR CHANGE

Unionists' descriptions confirm the unions' lack of attention towards the topic of racial discrimination, and their permeability to racism, which keeps on growing in Italy (Basso 2010; Basso, Perocco 2003; Ferrero, Perocco 2011; Raimondi, Ricciardi 2004). Besides mirroring the escalation of racism in the country, the presence of discrimination within trade unions is also a consequence of the insecurity felt by all workers because of the economic crisis, systematically channeled towards migrants with press campaigns, legislation provisions, political and popular mobilizations:

Recently, during an assembly, I was talking about migrant workers, but a colleague from another trade union asked me something unexpected: "Why do we care about migrants?" In Italy, the situation has been swinging due to media campaigns and punitive institutional norms against migrants. Of course, the economic crisis also led to a general fall in employment. This induced Italians to see migrants as competitors rather than as colleagues. The economic crisis has had an influence, but of course, also the propaganda of certain political parties has worsened racism. (Unionist)

Trade union representatives belonging to independent organizations highlight some issues and contradictions in the actions of mainstream trade unions against discrimination and the conflicts between local and migrant workers, identifying the fear of losing Italian members as the leading cause for the limitations of such struggle: "Mainstream trade unions do not fully engage for migrants as they fear their Italian members. [...] Many activists of the xenophobic Lega Nord [Northern League] party are members of the Cgil, so for mainstream trade unions, it is better not to tackle the issue of migration as they are afraid to face their members, or to lose them." (Unionist)

In general, all the interviewed unionists believe the struggle against racial discrimination is a central issue in workers' organizations. Yet, in practice, the strategies and policies implemented to that end are, again, quite fragmented, superficial, often left to individual initiatives. Activities that counter discrimination focus primarily on two aspects: the workplace (Ferrero, Perocco 2011) and life outside the workplace (housing, health services, welfare) (Ambrosini 2013; Manconi, Resta 2010). As for the first aspect, trade unions typically resort to labor law, while the knowledge of anti-discrimination norms and tools is largely connected to each operator's sensitivity, interest, and personal initiative, as previously indicated by key informants. This contributes to the reproduction and strengthening of heterogeneity and the fragmentation of actions countering racial discrimination. Alongside situations in which trade unions consider themselves powerless to tackle discrimination and manage conflicts between workers, in some situations, they implement effective anti-discrimination strategies to reunite workers. Some interviewees report – though cautiously – the determination of trade unions in countering the

discrimination within the economic crisis, especially in terms of dismissals (mainly aimed at migrants) and getting unemployment benefits (from which migrants are sometimes excluded) (Coletto, Guglielmi 2013; Fullin, Reyneri 2013; Reyneri 2010). As for the second aspect, the situation is again fragmented, yet several examples of good practices emerge, especially in terms of housing and local welfare: "In Brescia, we have opposed 23 municipal resolutions by Municipalities with Lega Nord [Northern League] administrations in which they have canceled aid to migrants in this period of crisis. We are the only trade union that sued, and we won all the cases." (Unionist)

Moreover, the interviewees – especially representatives at the national level – are aware of the need by trade unions to make a quantum leap in tackling discrimination. In particular, some believe that trade unions shall play a leading role in protecting the social needs of migrants within the so-called "social bargaining". At the same time, they report the practical difficulties that trade unions encounter daily in defending migrants' rights concerning housing, education, welfare, and services, highlighting that such issues often constitute "the main subject of trade with local institutions and, thus, we are the first to be expelled from the negotiating table" (Unionist).

Let us underline some differences between the mainstream and independent trade unions. While the first prefer legal and institutional tools to tackle discrimination, the latter frame the issue of racial discrimination within the general social conflict, including it in the collective momentum of street demonstrations. Similarly, there are differences between mainstream and independent trade unions regarding internal structure and representation. The former still have an under-representation of migrants in their governing bodies, though at different levels from town to town. The latter see a higher involvement of migrants and a greater inclination to create synergies with migrant associations. Unionists confirm that, in mainstream unions, migrant unionists are mainly considered as representatives of migrant workers and interlocutors for their fellow nationals, rather than for all workers. On this matter, there is a clear awareness of the need to change union policies on the presence of migrant representatives at the intermediate and upper levels but, at the same time, the perception is that there is already an evolution in progress to this end, though a very slow one:

We need to have trainings and let our members understand that a migrant representative does not deal only with residence permits, but shall be a fully-fledged unionist. Here in Brescia, we have over six migrant representatives who are thorough union leaders. We are slowly inserting representatives who are not only factory delegates because we need representatives belonging to the governing board of their organization. This does not mean we have done enough, but we are working on it and will get there. Not only in the Chambers of Labor, but also in the sectors' secretariats. (Unionist)

Such awareness is related to the significant increase in the number of migrants, which has imposed a review of the composition of governing bodies:

Within the trade unions, we have seen the growth in the awareness of the presence of migrants and their growth in numbers within the labor world. Almost 20% of new employees are migrants, and in the trade union, whether they like it or not, they have realized that. Let's keep in mind that the trade union has an interest in doing so: if the number of migrants increases, the union has an interest in giving them space, even from a "selfish" point of view. (Unionist)

The interviewees confirm what has repeatedly been indicated in literature (Basso 2010; Basso, Perocco 2003; Ferrero, Perocco 2011; Raimondi, Ricciardi 2004) on the institutionalization of racial discrimination by the national legislation, creating an iron bond between the residence permit and the work contract, making the conditions of stay and social rights dependent on their manufacturing capacity and employment.⁴ They also confirm the fact that migrant workers are liable to be blackmailed and that such conditions shall be spread, reaching all components of work, irrespective of their national origin:

A migrant needs work to renew their residence permit; thus, they are willing to do anything to keep their job. In this moment of economic crisis, migrant workers are obviously afraid to lose their jobs. Thus, many things are preventing migrant workers in reporting abuse, and the rights acquired by Italian workers in recent decades will not last, because if the Italian workers do not accept such conditions, the company will take the migrant. [...] These discriminating laws are weakening not only migrant workers, but also the whole labor world. (Unionist)

Trade unions are thus willing to start a path of workers' organization aimed at building a unity going beyond nationalities, residence conditions, or citizenship status.

THE WORDS OF MIGRANT WORKERS

Migrant workers strongly denounce the number of areas affected by racism and discrimination: labor organization and distribution of tasks, life outside the workplace, the situation within the trade union. As for the latter, forms of discrimination are rarely *within* trade unions, though it is interesting to see that an interviewee reports that, in the local branch he belongs to, there are attitudes which fragment the members:

⁴ These aspects are the basis of migration politics in Italy and were introduced with the Turco-Napolitano Law (Law 40/98) and consolidated by the Bossi-Fini Law (Law 189/02), still in force (Basso 2006; 2010).

The trade union itself sometimes creates a hierarchy; often, you notice that you, as a migrant, are treated as if you were less worthy. Because they think you understand less, you know less, or that as soon as you make some money, you'll leave. Perhaps this is not the general policy, but some unionists bear this message. The trade union, like all organizations, is made of people, with their own thoughts, and other people who experience these things personally. After many years I'm still told I don't understand things, and they believe it is because I'm a foreigner. This creates discontent, competition, mistrust. I believe they do it on purpose, because if all delegates are united, if there is solidarity and collaboration among them, especially if they belong to the same trade union, perhaps one day they could go against one representative or one secretary. In this way, instead, some delegates support them, and others don't. In part, this could be considered a form of discrimination; it's something subtle, non-transparent. Perhaps the representative sees the unity of Italian and foreign delegates and works to this end, but, so to say, they also work for this unity not to be too deep. As if there had to be unity, but only to a certain extent. (Migrant worker)

As for workplaces, the interviewees underline that migrants usually experience discriminatory treatments, especially in terms of organization of work and skills:

In general, I'm convinced that in the workplace, the most menial tasks and work are carried out by migrant workers, it's true. [...] You clearly see they rarely have managing or leading roles. Migrants always work under someone else; you are always told what you have to do. Even though I don't experience this situation in my job, at my workplace, there's an interesting melting pot: there are 13 different nationalities, and the tasks are well distributed, i.e., "easier" tasks – which require less effort – are interchangeable between migrants and Italian workers. (Migrant worker)

Racial discrimination is particularly widespread among cooperative workers (Sacchetto, Semenzin 2016). For them, the assignment of tasks and the possibilities to grow professionally are differentiated along ethnic and racial lines: "Unfortunately, most of the loading/unloading work is carried out by foreigners because it's the heaviest task, it causes several problems to the spine, to discs, hernias, etc. So, it's always us foreigners loading and unloading goods." (Migrant worker)

Some highlight, among the consequences of the economic crisis, mitigation in the diversification of tasks between migrants and natives, due to the downsizing of expectations and opportunities of local workers. The crisis has led to a general worsening of working conditions and possibilities, pushing locals to accept tasks, contract levels and wages which, during economic growth, were reserved for migrants, thus subverting a "racialized" social order, experienced by the migrants as "normal":

Where I work, in the turkey slaughtering department, especially in the "live turkey hanging" area, where live turkeys arrive, there used to be 13 of us, all foreigners.

Because it's the dirtiest job in the company, and the heaviest too, as each turkey weighs from 15 to 25 kg. You have to take it by the legs and place it on the chain. At first, we were all migrants, only the person in charge was Italian – but he did not work to hang them – because it's a very dirty job and when an Italian got there, usually they wouldn't last very long, because it was too heavy and too dirty, so they hired people like us, migrants. But now things have changed a bit, because with the crisis there isn't much work and everybody needs a job, Italians don't find much either. (Migrant worker)

Racism, thus, is consciously perceived as a mechanism segmenting the labor market, preventing its organization and resistance:

There is no specific division of skills, yet – and I can say it for sure – when they give jobs, they give them first to Italians and Albanians because they do not take part in strikes [...]. When we strike, Italians, Albanians, and Peruvians do not participate. During the last strike, the Peruvians went to work, while before they used to strike. They no longer help us to keep our jobs and convince the new employer. So, they say it's the Moroccans who organize strikes and who do not want to work. But we struggle and what we obtain is an advantage for them as well, who, instead, have kept good relations with the employer. Unfortunately, the repercussions of the latest strikes only affected us, as we were left home with no work, it's harder for us, there's more unemployment. This is because the Italians were not with us. (Migrant worker)

The division of labor based on nationalities and the stigmatization of migrants – or the most determined and demanding ones – is fed by the above-mentioned rise of racism in Italy. The interviewees underline an escalation of institutional racism and the consolidation of a largely discriminatory environment, whose aims are clear:

Discrimination episodes have become, for many years, something perceived as “normal”. In the last few years, there has also been a government feeding such discrimination. People usually need a government pointing towards a direction, but if the government is the first to discriminate, you can guess what people will do [...]. The government has instilled its policy in people's heads “beware of these people, they're dangerous, they're this and that”. [...] It's not that they don't want migrants, they want plenty of migrants, they would like to have Italy full of migrants, but illegal migrants! Liable to be blackmailed. To make them work 24/7. And so, you can make them work even for two euros per hour. (Migrant worker)

Despite the escalation of racism, there is consensus on the positive description of the relations between workers of different nationalities and, when migrants have reached a certain level of contract stability, they develop positive relations with their native colleagues. Yet, these relations mainly take place in the workplace and

rarely exist in other areas of social life. Sometimes, though, the workplace is not completely immune:

There are some strange people here ... A bit racist. They barely talk to us migrants, and when the topic of migration comes out, they start talking to each other, with their friends, saying: "These migrants are so and so ..." But there are good people among Italians, who get along with everyone. They're not all like that. In my department, there are around 15 or 20 like that. [...] Let me tell you that these people are like that not only with migrants, but also with Italians from the South. Sometimes they're more racist with them than with foreigners. [...] Almost everyone is a member of trade unions, even those with such ideas. On these things, the trade union does not and cannot do anything. The trade union can't or doesn't do. They talk about how you should behave in the workplace with your colleagues, but they won't talk about racism. (Migrant worker)

Workers who are members of a mainstream union report that, too often, these organizations do not carry out fully their anti-racist action. Those who are members of independent unions highlight that, especially in the context of cooperatives, the arrival of trade unions in the workplaces where they were not present before has always entailed a marked improvement of the conditions, also as concerns discrimination. In telling their experiences and in describing the stances of trade unions towards episodes of racism, the interviewees present a wide array of positions. Some, referring mainly to mainstream unions, clearly express their dissatisfaction with their poor determination:

The trade union knows migrants carry out the hardest and worse tasks! They know. They know, but don't do anything. They say: "Unfortunately, there is not much work, if we send a letter to the employer, they'll fire you, it's better for you to keep going without saying anything." So, you have to accept it. [...] Every month, I pay part of my wage to the trade union, and if I have a problem, *they* have to defend me. Instead, they say: "No, we can't. Because afterward, they'll fire you ..." But if I have rights, if I want to defend them, it's the trade union that should do it! "It's you, trade unions, who should go forward and not backward" [...] The trade union did nothing in cases of racism; and did not even give me the right information on the documents I needed for my residence permit and my son's citizenship. (Migrant worker)

The inadequacy of union action is included, even by workers, in the wider framework of discrimination underlying the whole society in the time of the global economic crisis. In such a context of "widespread racism" and recession, workers – especially migrants – are in a condition of further vulnerability while trade unions, which they still trust, are mainly described as "powerless". They run the risk of aggravating the already difficult situation of their migrant members:

The trade union can react to this, but with the current environment, with the crisis, companies and employers are taking advantage of it and telling migrants: "This is what there is, if you like it, you take it, if you don't want it, go somewhere else", so I try to tell trade unions about this situation which I don't like, but there's this situation and [...] the trade union tries to do something, but the owners of the company take advantage of the crisis. This part of the labor world, for companies, shall only be a "foreign" world, made of foreign workers which shall have no relations with Italian workers and, thus, if unionists support these demands they run the risk of damaging their members, because for them the only way to have a job is working like that. If they don't accept those conditions they won't work there. (Migrant worker)

One further difficulty for trade unions to act against racism is connected to the organization of labor concerning cooperative workers employed by external companies (Cillo, Perocco 2015; Sacchetto, Semenzin 2016). In the "subcontracting chain" it would be particularly hard for trade unions to assign responsibilities for a task distribution based on "racial" categories:

I don't think trade unions do much with episodes of racism, perhaps because they've never been called into question. Perhaps because even if they are called, there's not much they can do, because of racism and discrimination ... I mean, the whole society is racist, because the ones on top are racist! So, trade unions can't do much. Furthermore, trade unions cannot even enter the hotel where I clean, because they are connected with the cooperative, the Cub [an independent trade union] knows the hotel has nothing to do, or at least they pretend they have nothing to do with it, so the cooperative can say: "It's not our fault, it's the hotel that doesn't want them", but the trade union can't go to the hotel because they have nothing to do with them, it's also hard to prove that it was actually racism and not something else. (Migrant worker)

This last bit of interview also raises the question of the responsibilities of the State in the production and reproduction of racist rhetoric. As for institutional racism, both at the local and national levels, the actions and efforts of trade unions (mainly acknowledged for organizing street demonstrations) are considered inadequate and ineffective:

[Referring to discriminatory municipal provisions on the access to housing services] Trade unions have taken a stance and talked, but they only do that. What could they do? The house is not theirs. What matters is that you are a member, pay the fee, and that's it. But after all, many Africans were members. When I worked at De Longhi,⁵ I was a member of Cisl and a union representative. The majority of Africans working there were members, but what can you do? The State, the Province, or maybe the

5 An Italian home appliance company.

Municipality could stand up to something like that. [...] The trade union pressured them. They organized demonstrations for housing, Cgil, Cisl, Uil, all together. But nothing came of it. The Africans then said: "We'd better find out solutions together to help each other." So, when we knew someone had no place to stay, those who could host them at their place would do it. (Migrant worker)

The uneven commitment, diversified according to the different local contexts, adds up to, on the one hand, the disagreements between mainstream and independent unions and, on the other hand, the detachment between the bottom and the top of the union, even concerning the actions countering discriminatory policies carried out by local and national governments:

I remember I participated in a demonstration against the Security package organized by the independent trade union and not supported by Cgil. But on the streets, I found members of Fiom-Cgil and other Fiom delegates. One told me: "Even though it is not promoted by the federated union I belong to, I want to be here because I support this struggle." [...] There is a great difference between the bottom layers and the top of the union. (Migrant worker)

CONCLUSIONS

The escalation of racism – in the context of the economic crisis (Kanduč, Bučar Ručman 2016) – strongly marks the Italian society (Basso 2010; Ferrero, Perocco 2011), it orients the public and political debate and has affected trade unions as well. Workers' organizations, on the one hand, seem unprepared to face and counter racist attitudes and discriminatory practices, and, on the other hand, they are not immune to the penetration of discrimination on racial grounds within their organizations.

The first aspect depends on the lack of an organic and consistent union policy at the national level on countering discrimination and fragmented union strategies; on the absence of training and poor or absent knowledge of anti-discrimination legislation tools (Cillo, Della Puppa 2011; Ferrero, Perocco 2011). Such limitations mainly emerge from the discourse of unionists and union leaders, but also from those who collaborate with trade unions without being members (migrant associations, third-sector parties, etc.); these actors have a complete overview of the situation and talking to them brings out the perception of the inner heterogeneity of trade unions at category and local level, as well as the detachment between the bottom and the top of the organization. The stakeholders highlight a further contradiction of trade unions, which curbs its anti-discrimination drive, and which is a further central issue on their timid actions. This is the conflict of interests within which trade unions often have to work to report and counter institutional discrimination – discriminatory

practices and provisions carried out by local or national actors with whom the very same trade union has to work with on the administrative side.

The second aspect is directly linked to the widespread hostility toward migrants, which – especially within the crisis – defines the public debate, media campaigns, and the whole Italian society, including trade unions. This is mainly reported by migrant workers or, at least, their most advanced and determined component: people experiencing personally more or less overt racism and discrimination, in the workplace, trade unions, daily social life. The crisis has had a remarkable impact on the relations between migrant workers and trade unions and on the relations between migrant and local workers within trade unions, letting a few contradictions emerge. On the one hand, trade unions, especially mainstream ones, have had to tackle a dramatic increase in unemployment, with the explicit request by governments and employers' associations to give priority to "national" workers. On the other hand, they have to consider migrants' expectations, as they are an increasingly structural component of their members who, with the worsening of the crisis, have come closer to trade unions, often enlarging the distance between the top and bottom layers. Such an approach has taken place both due to a request for support in times of need by many migrants, and because, after all, trade unions have shown a welcoming approach towards them, as the sole open door in a country with escalating racism.

At the same time, the social and work needs created by the crisis have led mainstream unions to overlook the importance of discrimination events and racist behavior, often lacking actions to counter them in the training of their members and leaders. This aspect, together with the perception by many migrant workers of a general retreat from their stances by trade unions, has pushed many of them to leave mainstream unions to join independent ones. This shift happened mainly in sectors with a considerable presence of migrants, where subcontracting and cooperatives are intensely used (Cillo, Perocco 2015; Sacchetto, Semenzin 2016) – a remarkable example is the logistics sector (Cuppini *et al.* 2015). The research shows that these unions meet the expectations of their migrant members, due to their lean structure and for their ability to include migrant members in their governing bodies, for the significant improvement in conditions they manage to obtain in workplaces where trade unions were absent, for their ability to enter manufacturing sectors where contract and working conditions are structurally flexible, with their interventions and bottom-up approach, but also thanks to the attention they attach to discrimination – including institutional racism. Of course, the results are proportional to the small numbers they are dealing with and in the context of small workplaces in which such unions are present.

The element shared by the different trade unions, on which all interviewees agree, is the reflection on the need for a quantum leap by trade unions in countering racial discrimination and the awareness of the fundamental role that migrant members have within the union structures. In trade unions, too, migration is a "mirror"

(Sayad, 1999), pushing workers' organizations to observe how they are lagging behind a swiftly changing labor market and an increasingly heterogeneous composition of the workforce, to refresh their strategies and sensitivity.

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POVZETEK

SINDIKATI, DELAVCI MIGRANTI IN RASNA DISKRIMINACIJA V ITALIJI V ČASU EKONOMSKE KRIZE

Francesco DELLA PUPPA

Avtor v članku proučuje samo delno raziskano povezavo med sindikati in rasno diskriminacijo v Italiji v času ekonomske krize. Na primerjavi pričevanj intervjuvancev iz vrst deležnikov, sindikatov in v sindikate včlanjenih delavcev migrantov raziskuje učinkovitost prizadevanj italijanskih sindikatov v boju proti diskriminaciji od leta 2008 naprej. Študija je pokazala, da so delavske organizacije po eni strani nepripravljene na soočenje in boj proti rasnim predsodkom in diskriminatornim praksam, po drugi strani pa niso imune niti na pojav rasne diskriminacije v lastnih vrstah. Hkrati pa so največji sindikati zaradi družbenih in gospodarskih težav, ki jih je sprožila kriza, spregledali pomen pojavljanja diskriminacije in rasističnega vedenja. Pogosto so zamujali tako z zoperstavljanjem tovrstnim pojavom kot tudi z navodili svojim članom in vodjem, kako jih obravnavati. Prav ta odnos in opažanje številnih delavcev migrantov, da jih uradni sindikati v tem pogledu ne podpirajo, sta številne delavce prisilila, da so se pridružili neodvisnim sindikatom. Slednji so namreč bolj pripravljeni prisluhniti pričakovanjem svojih članov tudi zato, ker rasni diskriminaciji posvečajo večjo pozornost.

Vsi intervjuvanci so se strinjali, da morajo sindikati narediti kvantni preskok v obravnavanju pojava rasne diskriminacije, kakor tudi, da morajo končno prepoznati pomen članstva delavcev migrantov v svojih vrstah.

USE OF SOCIAL NETWORKING SERVICES AMONG SLOVENES AROUND THE WORLD

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COBISS 1.01

ABSTRACT

Use of Social Networking Services among Slovenes around the World

The authors conducted a survey of online groups on Facebook (N = 270) and a survey of Slovenian migrants (N = 629) to gain insight into the use of social networking services (SNSs) during different phases of the migration process. SNSs can help migrants establish new relationships with migrants in the destination country, which may help them to cope with periods of loneliness in the post-migrant phase. Online groups are an important source of information on the destination, aiding informed decision-making in the pre-migrant phase. Migrants in the post-migrant phase may have lower privacy concerns and perceive higher regulatory protection of their privacy than in the settled phase.

KEYWORDS: social networks, Facebook, migrants, social networking services

IZVLEČEK

Uporaba storitev socialnih omrežij med Slovenci po svetu

Da bi dobila vpogled v uporabo storitev socialnih omrežij (SSO) med različnimi fazami migracijskega procesa, sta avtorja pregledala spletne skupine na Facebooku (N = 270) in izvedla anketo med slovenskimi migranti (N = 629). SSO pomagajo migrantom vzpostaviti nova razmerja z migranti v namembni državi, kar jim lahko pomaga med spoprijemanjem z obdobji osamljenosti v postmigrantski fazi. Spletne skupine so pomemben vir informacij o destinaciji in pomagajo pri informiranemu odločanju v predmigrantski fazi. Migranti imajo v postmigrantski fazi manjše skrbi glede zasebnosti in zaznavajo višjo regulativno zaščito svoje zasebnosti kot v ustaljeni fazi.

KLJUČNE BESEDE: socialna omrežja, Facebook, migranti

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INTRODUCTION

Due to the development of the internet and social networking services (SNSs), future generations will very likely find it hard to imagine that in the past, letters traveled several months or years to reach their intended recipients. SNSs today provide billions of people (Statista 2020) with ongoing and highly reliable connectivity (Bieniasz, Szczypiorski 2019), fast and easy access to communication, sharing thoughts with others, and several other activities, such as entertainment, education, building human relationships and political activities (Grčić et al. 2017; Ortiz Ángeles et al. 2017; Bustos López et al. 2018; Sivasangari et al. 2018). It is well-known that from the beginning of emigration, as they have founded their communities, Slovenian migrants have been able to organize themselves for cultural, ethnic, and religious affiliation (Kuzmič 2001; Kalc 2018). Using the internet and being online can, therefore, help and enhance the preservation of the cultural and ethnic heritage of Slovenes around the world (Hladnik 2008; Lenarčič 2020).

However, the use of communication technology and SNSs among Slovenian migrants has rarely been studied (Lenarčič 2020). Rather, the research has focused either on the internet in general (Hladnik 2008) or specific websites (Meden 2007). For example, Meden (2007) reviewed existing and representative web pages of Slovenes around the world. In the last two decades, however, no new research has emerged to address the topic of the use of SNSs by Slovenian migrants. To fill in this gap, we conducted one of the first studies on the use of SNSs among Slovenian migrants. The migration process can be divided into four key phases: pre-migrant, travel, post-migrant, and settled phase (Lenarčič 2020). We posit the following research questions to study the use of SNSs among Slovenian migrants in these phases:

RQ1: Which topics related to the pre-migrant, travel, post-migrant, and settled phases do Slovenian migrants and would-be migrants discuss in online groups on Facebook related to Slovenes around the world?

RQ2: What are the differences in the perceptions regarding security and privacy on SNSs of Slovenian migrants in post-migrant and settled phases?

We have organized this paper as follows. First, we lay out the theoretical foundations of the study in the section Migration and Social Networking Services. In the section Research Methodology, we describe in detail the employed research design and methods. We first describe the data collection and analysis procedures for the survey of online groups on Facebook related to Slovenes around the world and then for the survey of Slovenian migrants. The section Topics Discussed in Online Groups presents the results of the qualitative analysis of user posts in studied online groups, and the section Perceptions Regarding Social Networking Services presents the results of the quantitative analysis of the perceptions of Slovenian migrants regarding SNSs. We also discuss the implications of the results within these sections.

In the section Concluding Remarks, we outline the overall impact and limitations of our study and provide suggestions for future research.

MIGRATION AND SOCIAL NETWORKING SERVICES

The ubiquitous presence of technology in our everyday lives has blurred the physical limits of our social endeavors as SNSs offer us a variety of social functions, such as providing social and emotional support, maintaining relationships between people and obtaining information on various matters, regardless of where we are (Joinson 2008; Atanasova, Petrič 2014; Shahriari et al. 2017). Today's always-connected *online societies* affect not only the migration process but the concept of migration itself (Lenarčič 2020). Traditional migrants have reshaped into *connected* or *online migrants*, who can essentially migrate to the destination country together with their social networks. This possibility enables them to keep close to their homeland and enables the emergence of new phenomena, such as digital diasporas (Oiarzabal, Reips 2012; Lenarčič 2020). Online migrants may, therefore, eventually establish a bicultural identity (Reips, Buffardi 2012) and maintain or strengthen their ties with two homelands in parallel.

Although SNSs can help in keeping migrants close to their homelands, they can also hinder their motivation to establish new social relationships with local residents in destination countries, which may, in turn, affect their well-being (Zhang et al. 2019; Lee et al. 2020). A lack of motivation to engage in relationship building with local residents coupled with language and other barriers may result in the social loneliness of migrants despite having a sizeable social network, frequent contacts, and good family relationships (ten Kate et al. 2020). Social and emotional loneliness may stem from high expectations about social relationships and a lack of a sense of a community (Ibid.). Cultural loneliness caused by not feeling understood in a different cultural context may also emerge (Ibid.). In some cases, migrants may also experience loneliness due to the separation from social networks in their homeland despite the existence of SNSs (Lee et al. 2020).

Migration also affects the people who stay behind. For example, the women who remain as their family members migrate internationally are at higher risk for depression (Edelblute, Altman 2020). Social support and relationships, coupled with the frequent use of SNSs, may reduce the odds of depression among them (Ibid.). Migrants also offer some insight into foreign countries to members of their social networks, which may affect their decision to migrate as well (Nelson, Marston 2020). Although the migrants' social networks facilitate the spread of job information, only the native social network in a destination country seems to provide migrants with information on better job opportunities (Bolibar 2020; Wang 2020). It may be interesting to note that the less accurate the information passed to a potential migrant, the greater its impact (Nelson, Marston 2020). Vague success stories seem to attract

people to migrate more than accurate information on the difficulties of finding a job and learning a foreign language (Ibid.). Accurate information from trusted sources, such as migrated family members and friends, may, therefore, discourage would-be migrants from migrating themselves (Lenarčič 2020).

The use of SNSs by migrants may also give rise to unwanted phenomena, such as long-distance nationalism, which may fuel inter-ethnic conflicts between migrants and the local population (Oiarzabal, Reips 2012). Although migrants tend to be less politically involved (McKay 2020), SNSs are often a vital source of political information (Ajder 2018). SNSs may even be leveraged by authoritarian regimes to build soft power resources in migrant communities and try to influence events in other countries (Golova 2020).

To study the use of SNSs in the context of migration, we lean on the four phases of the migration process proposed by Hiller and Franz (2004) and Lenarčič (2020). The *pre-migrant phase* covers the decision-making process of potential migrants. It involves gathering information on the destination and how to reach it as well as establishing contacts with individuals and communities in the destination country to facilitate the migration (Hiller, Franz 2004; Lenarčič 2020). The *travel phase* typically involves seeking real-time information related to reaching the intended destination. It is especially relevant for illegal migrants (e.g., navigation, safe points for crossing a border, weather forecasts, etc.) (Lenarčič 2020). The *post-migrant phase* is the time since reaching the destination country until settling there and may be arbitrarily set to five years, even though it may be significantly shorter or longer for individual migrants (Hiller, Franz 2004; Lenarčič 2020). In this phase, migrants try to integrate into the new social environment while typically keeping in touch with people and culture in their homeland (Lenarčič 2020). In the *settled phase*, migrants usually fully adapt to the new environment and try to keep or re-establish a lost connection to the homeland (Hiller, Franz 2004; Lenarčič 2020).

RESEARCH METHODOLOGY

This paper reports on two separate but complementary studies. The first is a survey of online groups on Facebook related to Slovenes around the world to gain insight into the topics discussed by Slovenian migrants. The second is a survey of Slovenian migrants to determine the differences in their perceptions regarding SNSs in the post-migrant and the settled phases.

Survey of Online Groups on Facebook Related to Slovenes around the World

To answer *RQ1*, a survey of online groups on Facebook related to Slovenes around the world was conducted between April 11 and June 12, 2019. In this paper, we consider an *online group* any of the following: a Facebook group, a Facebook page, or a

Facebook profile. Although there are significant differences in their functionalities, we considered all of them as online groups due to their primary objective, i.e., to provide a platform for connecting Slovenian migrants.

A Facebook user can typically join *Facebook groups* by sending a request. The group's administrators or moderators process and either confirm or reject the request to join it. Administrators have full control of a group, while moderators have a limited set of functionalities (e.g., they cannot delete a group). Although it is possible to set up a Facebook group without the need for new members to first send a request, most groups require the approval of the group administrator or moderator. We noticed an issue with non-responsive administrators or moderators, as it can take a long time before someone is accepted into the group. This is especially an issue for groups with a single administrator. All group members can post into the group, which forms a kind of group chat. Individual posts can be pinned by administrators or moderators to increase their visibility.

Facebook pages are typically dedicated to certain topics. Unlike Facebook groups, Facebook pages cannot be joined. Instead, users can only like them. Anyone can post on a page without ever liking it. The major difference is that user posts are much less visible on pages than in groups. The main content is provided by page owners (or users with other roles), and casual visitors can easily overlook user posts at the side of the page.

Facebook profiles are meant for natural persons. Nevertheless, profiles can be used to form online groups. One can connect with a profile by adding it as a friend. A Facebook profile can publicly (e.g., through public posts on its wall) or quasi-publicly (e.g., a group chat with most or all friends of a profile) interact with others. Essentially, a Facebook profile is equivalent to a Facebook page meant for natural persons instead of businesses, associations, and other communities.

By using a combination of different keywords, such as *Slovenes in*, *Slovenians in*, *Slovenian home*, and *Slovinci v*, and our own intuition as researchers, we searched for the relevant online groups on Facebook. We identified a total of $N = 270$ Facebook groups, pages, and profiles (127, 140, and 3, respectively). Table 1 shows the top ten online groups by their size.

Table 1: Top ten online groups by size in 2019

Online group on Facebook	Type	Launched	Num. of users
Slovinci v Avstriji	Facebook group	2013	24,575
Slovinci v Londonu	Facebook group	2007	10,145
Slovinci v Nemčiji	Facebook group	2010	7,279
Slovinci v Švici	Facebook group	2008	6,396
Study Planet Slovenia	Facebook page	2014	6,144

Slovinci v Avstraliji	Facebook group	2008	5,446
Slovinci v Berlinu	Facebook group	2010	4,251
Slovinci na Nizozemskem	Facebook group	2008	4,013
Slovenian Genealogy (Genealogy2000)	Facebook group	2011	3,796
Slovinci na Filipinih	Facebook page	2016	3,334

We first screened online groups for their characteristics. The collected data included the name of the online group, type, target country, creation date, number of members, hyperlink, and screening date. Next, we qualitatively analyzed the content of the most recent posts in individual online groups in a non-intrusive way. We coded the posts to identify emergent themes based on the data, providing illustrative quotes to better describe the themes. Finally, we conducted a cross-group analysis to consolidate the findings.

We have preserved the names of the online groups on Facebook, which allows the readers to find them directly. Some online groups have been on Facebook for a long time. For example, the oldest online group (namely, *Slovenians in the UK*) was launched on June 6, 2007. During their existence, some online groups have changed their names or key themes. Online groups can also become inactive. Some of them only temporarily but others seemingly permanently. For example, the most recent activity in some of the studied online groups was in 2014 (i.e., five years before our study).

Survey of Slovenian Migrants

To answer *RQ2*, an online survey has been conducted among members of online groups on Facebook related to Slovenes around the world (e.g., *Slovenes in Austria*, *Slovenes in Australia*, *Slovenes in Munich*, *Slovenian Union of America*, *Slovene National Benefit Society*, etc.) using snowball sampling for practical reasons, such as the ability to comment, share, ask questions, and observe responses of other SNSs users. The survey was hosted on the *1ka.si* online platform from February to June 2019. Respondents were advised that participation was voluntary, that their anonymity would be protected, that data would only be reported only in aggregated form, and that collected data would only be used for research purposes.

A total of 633 respondents completed the survey. After excluding poorly completed responses, we were left with $N = 629$ useful responses. The age of the respondents ranged from 16 to 110 years ($M = 41.5$, $SD = 15.9$). Table 2 presents other demographic characteristics and the duration of residence.

Table 2: Demographic characteristics of the sample and duration of residence

	N	%
<i>Gender</i>		
Female	376	59.8
Male	247	39.3
N/A	6	1.0
<i>Status</i>		
Student	81	12.9
Employed	425	67.6
Not employed	36	5.7
Retired	75	11.9
N/A	12	1.9
<i>Education</i>		
Completed high school or less	89	14.1
Bachelor's degree	211	33.5
Master's degree	229	36.4
PhD degree	91	14.5
N/A	9	1.4
<i>Duration of residence</i>		
Since birth	236	37.5
More than fifteen years	84	13.4
Ten to fifteen years	36	5.7
Five to ten years	69	11.0
One to five years	131	20.8
Less than one year	58	9.2
N/A	15	2.4

Based on a respondent's duration of residence, we determined the migration phase. We considered respondents with up to five years of residence to be in the post-migrant phase, while those with over five years of residence to be migrants in the settled phase. Most respondents in both migration phases were female, although the share was higher in the post-migrant than in the settled phase (65.6 and 57.6 percent, respectively). Most respondents in both phases were employed (70.4 percent in the post-migrant and 68.2 percent in the settled phase). More respondents were students in the post-migrant than in the settled phase (21.2 and 9.6 percent, respectively), indicating a noticeable share of Slovenes studying abroad. Unemployed respondents in the post-migrant phase were more than those in the settled phase, albeit both with relatively small shares (8.5 and 4.7 percent, respectively). All retirees were in the settled phase. Respondents in both migration phases had comparable formal education. Most respondents have a bachelor's or master's degree. The share of respondents with a PhD degree seems rather high, suggesting a *brain drain*.

Respondents were from 55 countries around the world, as presented in Table 3. The sample seems to be dominated by respondents from the United States (20.7%).

Neighboring countries with Slovenian minorities (e.g., Italy, Austria), countries with notable Slovenian diaspora (e.g., Argentina, Canada, Australia), and traditional destinations in the EU for migrants for economic reasons (e.g., Germany, Switzerland, UK) are also well-represented. However, their share does not appear to be much higher than in other countries. Such numbers suggest that these countries may be under-represented in our sample.

Table 3: Country of residence

N	Countries
130–132	United States
37–39	Argentina
34–36	Canada, Slovenia
31–33	Australia, Germany
25–27	United Kingdom
22–24	Austria
19–21	Croatia
16–18	Italy, Serbia, Sweden, Switzerland
13–15	France, Netherlands
10–12	Belgium, China, Hungary, Ireland, New Zealand
7–9	Spain
4–6	Bosnia and Herzegovina, Brazil, Finland, Greece, Luxembourg, Norway, Poland, Portugal, Slovakia
1–3	Albania, Bulgaria, Cambodia, Czechia, Cyprus, Denmark, Dominican Republic, Egypt, Estonia, Iceland, Iran, Latvia, Mali, Malta, Mexico, Montenegro, North Macedonia, Paraguay, Romania, Russia, Singapore, Thailand, Turkey, Ukraine, Uruguay

Although respondents may use different SNSs, they provided only the SNS they most frequently use. Table 4 presents the most-frequently-used SNSs.

Table 4: Most frequently used SNSs

Social networking service	N	%
Facebook	368	58.5
WhatsApp	93	14.8
Instagram	85	13.5
Twitter	16	2.5

Google +	11	1.7
WeChat	10	1.6
Snapchat	9	1.4
Viber	8	1.3
Pinterest	5	0.8
Skype	5	0.8
Linkedin	4	0.6
Signal	2	0.3
N/A	13	2.1

The most frequently used SNSs are *Facebook*, *WhatsApp*, and *Instagram*, which are all owned by Facebook, Inc. The remaining SNSs have much lower shares, suggesting a skewed sample as it does not reflect the market shares of SNSs.

In our questionnaire, previously validated items were used and adapted to the context of our study. We measured privacy concerns of SNS users (*privacy concerns* – PC), their trust in SNS providers (*trust in social network providers* – TiSP), and perceived regulatory protection of their privacy on SNSs (*perceived regulation* – PR). Each of these constructs was measured with three items. All items were measured using a 5-point Likert scale from 1 (*I strongly disagree*) to 5 (*I strongly agree*). We prepared two versions of the questionnaire, one in English and one in Slovenian. Both English and Slovenian questions for PC and PR were taken from (Fujs et al. 2019), and English questions for TiSP were adapted from (Harrison McKnight et al. 2002). Afterward, translators provided independent translations for TiSP items into Slovenian. The translations were then consolidated. The questionnaire was pre-tested by academic peers and refined according to received feedback. To ensure consistency between both versions of items, Slovenian items were translated back into English and compared with the original English items.

The reliability of the questionnaire was evaluated with Cronbach's alpha coefficient (CA). CA ranged from 0.837 (PC) to 0.879 (PR), indicating good reliability for all measured constructs. Items for individual constructs were aggregated into new construct variables by calculating their means. To compare the means of construct variables for respondents in the post-migrant and settled phases, we conducted an independent samples *t*-test.

TOPICS DISCUSSED IN ONLINE GROUPS

Topics related to the pre-migrant phase included seeking information and tips regarding vacations, short-term accommodation, working abroad, housing, or legal advice. It is not possible to determine with certainty for all queries whether potential migrants or tourists posted them. Not all members of online groups on Facebook seem to be current or potential migrants as people interested in the destination country and past migrants also seem to frequent online groups of interest. Several online groups, such as *Delo & nastanitev Slovinci na Dunaju*, dedicated to exchanging information on job opportunities and accommodation, have been identified. In these online groups, members mostly look for information and advice regarding working conditions, needed knowledge, and expectations from potential employers. They rarely discuss topics on how to reach the destination, indicating that the travel phase may not be an issue for Slovenian migrants (as opposed to illegal migrants). Also, online groups and websites dedicated to traveling may contribute to this.

Most topics related to the post-migrant and the settled phases seem to be overlapping. The only topic that can relatively confidently be attributed to migrants in the post-migrant phase is *seeking different recommendations* (e.g., tax advisor, physician, lawyer)¹. Otherwise, migrants in these two phases are often looking for information on how to purchase products that are made or are commonly available in Slovenia (e.g., *potica*) in the destination country. For example, one user wrote: “Where can I buy *potica* online and have it shipped!!! I miss it 😊.”

Migrants also frequently seek ways to send packets to or receive them from Slovenia. For example, they are looking for people traveling from or to Slovenia who can bring or take back some goods with them:

Would anyone have suggestions on easiest method/carrier to send small package to Slovenia? We are sending some items to our cousins in Topolsica we have met using the information and tools from this group. We are so appreciative for all the sharing and any information about mailing/shipping. Thank you all!

A significant share of posts in online groups is related to the achievements of Slovenian sportsmen and sportswomen, including photos of the various beauties of Slovenia, or is simply related to Slovenia in one way or the other. For example, a user wrote a post on a famous Slovenian architect:

Jože Plečnik was a Slovene architect who had a major impact on the modern identity of the city of Ljubljana, the capital of Slovenia, most notably by designing the iconic Triple Bridge and the Slovene National and University Library building, as well as the

1 All texts copied from Facebook are in the original (untranslated, uncorrected).

embankments along the Ljubljanica River, the Ljubljana open market buildings, the Ljubljana cemetery, parks, plazas, etc.

Online group members sometimes post job opportunities and vacancies or try to raise funds for various reasons, such as funerals, building construction, birthday gifts, research, etc. Migrants use online groups to socialize and search for people who are willing to meet (e.g., for a drink or a picnic). In the post-migrant phase, such activities may be aimed at establishing new relationships with other migrants in the destination country. In the settled phase, they may seek to keep or re-establish the connection to people from the homeland and its culture. Some online groups seem to specialize in the promotion of socializing events, such as meetings, picnics, dances, and other social events. Online groups dedicated to helping Slovenian migrants to study their roots and discover their relatives and family in Slovenia (e.g., *Slovenian Genealogy Society International, Inc. (SGSI)*, *Slovenian Genealogy (Genealogy2000)*, *Slovenian Genealogy (gen2000) WWII, 1945 and its aftermath*) also exist. These groups primarily facilitate the exchange of information between migrants in the settled phase and residents in Slovenia. For example, a user looks for available records online: "Anyone researching Lutheran church records for Prekmurje? Having difficulties locating any records and any suggestions would be appreciated." For similar reasons, residents in Slovenia sometimes publicly search for specific people on online groups.

We can draw several implications from these results. First, the results seem to support existing literature on the use of technology in the migration process (Lernarčič 2020). A much lower frequency of topics related to the travel phase discussed in online groups on Facebook may be attributed to predominantly legal migration of Slovenian migrants and alternative channels for obtaining this information. Second, SNSs can help migrants establish new relationships with migrants in the destination country. Although such relationships cannot replace new relationships with local residents, they may help migrants to avoid or cope with periods of loneliness in the post-migrant phase. It may be important to note that online groups do not seem to be frequented by the local population (e.g., individuals that may be interested in socializing with Slovenian migrants). Third, online groups seem to be an important source of more or less accurate information on the destination (e.g., information related to finding and keeping a job) for potential migrants. Since online groups appear to be well-frequented by potential migrants, they may help them make an informed decision about migration. Fourth, we did not notice any signs of long-distance nationalism or other phenomena that would fuel inter-ethnic tensions between migrants and the local population. Instead, members seem to be more interested in promoting their homeland and culture by sharing posts on, e.g., achievements and beauties related to Slovenia.

PERCEPTIONS REGARDING SOCIAL NETWORKING SERVICES

By far, Facebook is the most popular SNS among the respondents, followed by WhatsApp and Instagram. These three SNSs are all owned by Facebook, Inc. Although Facebook is currently the most widely used SNS in the world (Grčić et al. 2017; Ortiz Ángeles et al. 2017; Fujs et al. 2019a), it still stands out, as 86.8% of respondents use most frequently one of their SNSs. Facebook's domination may be partially attributed to the employed sampling focusing on online groups on Facebook. It may be interesting to note that Facebook was not the most frequently used SNS among respondents from China. A key factor may be that it is banned there (Błachnio et al. 2016). China has developed its own alternative SNSs, such as WeChat, which enable companies to monitor conversations and to detect politically sensitive discussions (Shirky 2011; Harwit 2017). Authoritarian regimes and certain SNSs may, therefore, invade the privacy of SNS users.

Despite considerable efforts by oppressive regimes to censor the internet (e.g., the Great Firewall of China) by employing a combination of automatic censorship with artificial intelligence and manual censorship (Heins 2014), individuals can still access banned SNSs through various proxies, such as Virtual Private Networks (VPNs) or the Tor anonymity network (Xu 2014). Another threat to the privacy of SNS users comes from SNS providers. Major SNS providers, such as Facebook, are built on a business model of selling data of their users in one way or another. By using SNSs, users essentially trust their SNS providers with their personal data (e.g., private chat messages). Although existing regulations, such as the GDPR, may protect SNS users' data to a certain extent, SNS providers did not significantly change their business models, indicating that SNS users may still consider them as threats to their privacy. As a counterweight to state surveillance and profit-maximizing SNSs, several privacy-oriented decentralized SNSs, such as Mastodon, Diaspora, and Riot.im, have emerged. These SNSs aim to keep the ownership of data on the side of their users. However, with a few exceptions limited to certain profiles of users (e.g., Discord in the gamer community), they have not reached a wider user base. A final threat to the privacy of SNS users may stem from the users themselves. Most SNSs enable users to publicly express themselves by posting their thoughts, photos, and other materials. These users' public fingerprints may be used by others, from repressive regimes to potential employers, without the SNS users' knowledge (Miller 2012).

To gain an insight into the overall perceptions of respondents regarding SNSs, Table 5 presents the descriptive statistics of aggregated variables and their reliability coefficients.

Table 5: Means, standard deviation and Cronbach's alpha of measured constructs

Code	Construct	M	SD	CA
PC	Privacy concerns	4.15	0.81	0.837
TiSP	Trust in SNS provider	2.49	0.90	0.840
PR	Perceived regulation	2.49	0.83	0.879

M – mean; *SD* – standard deviation; *CA* – Cronbach's alpha

The high mean for *Privacy concerns* ($M_{PC} = 4.15$) suggests that respondents do care about privacy, although they may not always be motivated to protect themselves against privacy intrusions (Mihelič, Vrhovec 2018). Most respondents appear to be privacy-aware regarding providing their personal data to SNS providers. In part, this may be attributed to a general rise in privacy awareness after Edward Snowden's leaks of highly classified information from the NSA in 2013, which revealed various global surveillance programs and prompted a discussion on the trade-offs between national security and individual privacy (Lucas 2014). Even though respondents appear to be highly concerned about providing personal data to SNSs, the mean for *Trust in SNS provider* ($M_{TiSP} = 2.49$) does not appear to be similarly low; it is just under the neutral score of the scale. These results suggest that respondents do not fully trust their SNS providers, which may be a consequence of several recent high-profile privacy-related scandals, such as Cambridge Analytica. These scandals, however, appear to have a more limited impact on the privacy awareness of SNS users than global surveillance programs discussed previously. This could be attributed to surveillance programs monitoring all internet activity beyond the activity on SNSs, such as personal e-mails, advanced tracking of everyday internet activities (e.g., which websites people are browsing), and profiling. Even though SNSs, such as Facebook, diligently try to capture all internet activity of their existing and potential users for profiling purposes (e.g., Facebook-like buttons on websites that do not appear to be connected to Facebook enable it to track their users even when not browsing through Facebook – even when users are not logged in), SNS users are rarely aware of this practice. The mean for *Perceived regulation* ($M_{PR} = 2.49$) also seems to be relatively low, indicating that respondents do not consider the regulations ensuring adequate levels of privacy on SNSs. Since respondents reside in different countries with differing regulations, these results need to be considered with caution. Overall, the results suggest that governments, domestic and international legislation do not protect the privacy of SNS users. Two key reasons may cause such perceptions of the respondents. First, governments may be unable to provide regulations for adequate privacy on SNSs due to the international character of the cyberspace and the innovative capacity of SNS providers. Second, governments may be unwilling to provide such regulations as they would, e.g., compromise their ability to ensure national security. For example, the state authorities require all software used on the Russian market to

provide backdoor access that enables surveillance by state institutions. For cyberspace to become a privacy-friendly environment, international regulations ensuring adequate levels of privacy would have to be established. However, it does not appear that this will happen anytime soon in the foreseeable future.

Table 6 presents the results of an independent samples *t*-test to determine differences between perceptions of migrants in the post-migrant and settled phases.

Table 6: Comparison of construct means in post-migrant and settled phases

Code	Construct	<i>T</i>	<i>p</i>	$M_{pm} (SD_{pm})$	$M_s (SD_s)$
PC	Privacy concerns	-2.788	**0.005	4.01 (0.90)	4.21 (0.77)
TiSP	Trust in SNS provider	0.566	0.569	2.52 (0.84)	2.48 (0.93)
PR	Perceived regulation	2.349	*0.019	2.61 (0.85)	2.44 (0.82)

pm – post-migrant phase; *s* – settled phase; * *p* < 0.05, ** *p* < 0.01

There seems to be a significant difference in privacy concerns ($p < 0.01$) and perceived regulation ($p < 0.05$) of migrants in the post-migrant and settled phases. The results suggest that migrants in the post-migrant phase have lower privacy concerns than migrants in the settled phase. This can be attributed to their higher degree of perceived regulatory privacy. It seems that migrants in the post-migrant phase trust more the regulative protection of their privacy and have lower privacy concerns due to this. Assuming that, with time, migrants become more familiar with the regulations in the destination country, their perceived regulatory protection lowers slightly, resulting in higher privacy concerns. An alternative explanation could be that migrants are simply less concerned about their privacy in the post-migrant phase as other issues, such as adapting to the new environment, take priority. In the settled phase, privacy slowly floats higher on the list of priorities.

CONCLUDING REMARKS

We did not identify any truly global online group of Slovenes around the world. Even though we were able to find some general online groups, such as *Slovenci po svetu*, *Lastovke stičišče povratnikov*, *zdomcev in izseljencev*, *Slovenci.si*, *Urad Vlade RS za Slovence v zamejstvu in po svetu* and *Slovenska izseljenska matica*, they have relatively few members and do not appear to be particularly active. This finding suggests that online groups do not fully remove borders and are still limited to certain physical locations. A more narrowly focused online group may provide its members with more relevant topics (e.g., topics relevant for Austria may differ significantly from those relevant for Canada). It is not always easy to find online groups related to Slovenes around the world due to varying naming conventions (e.g., *Slovenes in*

[...], *Slovenians in [...]*, *Slovinci v [...]*, topic-based names). Some standardization of online group names would be beneficial, however hard to achieve, as group owners can freely choose their groups' names. Alternatively, it would be beneficial to create and maintain a database of Slovenian online groups. More or less updated lists of Slovenian associations around the world already exist, such as *Slovinci.si* (2019; Urad vlade RS za Slovence v zamejstvu in po svetu 2019). These lists are, however, limited to official associations and do not include informal online groups that can be found on SNSs. An updated database of online groups would help in identifying thriving as well as declining groups.

Slovenian migrants and their descendants are often looking for their relatives. It would be thus beneficial to connect related online groups with various institutes and museums that have access to such data and could help them in their quests. One of the key treasures in this regard are churches that keep family trees in their baptismal books. Since archives are not always in digital form, it would be critical to motivate people with access to the archives to engage in online genealogical groups. Going online could motivate people with access to the archives to enhance their presence in Slovenia and expand their genealogy business to the global market.

Despite the meaningful implications, the study has some limitations that provide the impetus for future studies in this research area. First, we conducted our study among Slovenian migrants via a survey in two languages (i.e., Slovenian and English). It would be beneficial to conduct the survey also in other languages, such as Spanish (Lapuh 2011). Other languages would enable the inclusion of more Slovenian migrants and their descendants, especially those who speak neither Slovenian nor English. Second, our findings cannot be fully generalized to all Slovenian migrants due to the snowball sampling method employed. This is a limitation that would be next to impossible to overcome as no lists of Slovenian migrants exist. There are electoral registries; however, they are limited only to Slovenian citizens with voting rights, which excludes Slovenian migrants without citizenship. Legislation, such as the GDPR, may make it even more difficult to reach Slovenian migrants in the future. Despite this limitation, conducting surveys may still prove useful, especially when complemented by qualitative research approaches that provide a more in-depth understanding of the phenomena under study (Fujs et al. 2019b). Third, our survey was distributed through online groups on Facebook and by e-mail. Including other SNSs would allow for the comparison perceptions of users of different SNSs as users of certain SNSs may be willing to reveal more information than users of other SNSs (Dwyer et al. 2007).

Future research may also focus on the differences between the perceptions of SNSs users in the East and the West, potentially by applying the institutional theory on the use of SNSs by Slovenian migrants in different countries. Looking more broadly, SNSs themselves present an opportunity for researchers as well. For example, in the past, researchers had to rely on testimonies, diaries, notes, and correspondence to outline the biography of individuals, such as Ivana Kobilca (Strle 2018). With the

emergence of SNSs, researchers may be able to gain more personal insight into the studied people (Reips, Buffardi 2012). However, data triangulation with other data sources would still be needed to support and confirm the data obtained directly from SNSs. Another avenue for future research lies in examining the evolution of web pages of Slovenes around the world to gain insight if they evolved into or were complemented by online groups on SNSs.

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POVZETEK

UPORABA STORITEV SOCIALNIH OMREŽIJ MED SLOVENCMI PO SVETU

Damjan FUJS, Simon VRHOVEC

V preteklosti razmere prenekaterima Slovencu ali Slovenki niso prizanašale in so bile povod za odhod v svet. V iskanju boljšega življenja so odhajali z malo ali nič informacijami o destinaciji. Danes so migracije drugačne, s pomočjo storitev socialnih omrežij (SSO) se v relativno kratkem času lahko pridobi informacije, napotke in usmeritve za delo v tujini.

V prispevku avtorja poročata o eni prvih študij o uporabi SSO med slovenskimi migranti v različnih fazah migracijskega procesa. Migracijski proces se deli na štiri ključne faze: predmigracijska faza, faza potovanja, postmigracijska faza in ustaljena faza. Da bi dobila vpogled v teme, o katerih slovenski migranti razpravljajo v različnih fazah migracijskega procesa, sta najprej pregledala spletne skupine na Facebooku ($N = 270$). Nato sta, da bi ugotovila razlike med percepcijami o SSO slovenskih migrantov v postmigracijski in ustaljeni fazi, med njimi izvedla anketo ($N = 629$). Rezultati pregleda spletnih skupin na Facebooku podpirajo obstoječo literaturo o uporabi tehnologije v migracijskem procesu. Manjšo pogostost tem, povezanih s fazo potovanja, je mogoče pripisati pretežno zakonitim migracijam slovenskih migrantov in alternativnim kanalom za pridobivanje informacij o potovanjih. SSO lahko migrantom pomagajo pri vzpostavljanju novih odnosov z migranti v namembni državi. Čeprav taki odnosi ne morejo nadomestiti novih odnosov z lokalnimi prebivalci, pa lahko priseljencem pomagajo, da se izognejo obdobjem osamljenosti v postmigracijski fazi ali da se z njimi spopadejo. Spletnih skupin lokalno prebivalstvo praktično ne obiskuje, zato preko njih migranti ne morejo navezati stikov z lokalnim prebivalstvom. Spletne skupine se zdijo za potencialne migrante pomemben vir bolj ali manj natančnih informacij o destinaciji (npr. informacije o iskanju in ohranjanju zaposlitve). Ker se zdi, da potencialni migranti pogosto sodelujejo v spletnih skupinah, jim te lahko pomagajo pri odločitvi o migraciji.

V študiji avtorja nista opazila nobenih pojavov, ki bi spodbujali etnične napetosti med migranti in lokalnim prebivalstvom. Člani spletnih skupin so namreč bolj zainteresirani za promocijo svoje domovine in kulture, npr. z deljenjem objav o dosežkih in lepotah Slovenije. Rezultati ankete med slovenskimi migranti podajajo nekatere nove ugotovitve. Visoka skrb za zasebnost nakazuje na to, da je respondentom zanj mar. Rezultati kažejo tudi, da slovenski migranti ponudnikom socialnih omrežij ne zaupajo povsem in da se jim z zasebnostjo povezana regulativa ne zdi zadostna. Primerjava med odgovori migrantov v postmigracijski in ustaljeni fazi nakazuje, da imajo migranti v postmigracijski fazi manjše skrbi glede zasebnosti in zaznavajo višjo regulativno zaščito svoje zasebnosti kot v ustaljeni fazi. V zaključku so podane praktične implikacije raziskave in napotki za prihodnje raziskave.

TAKING PART AND BEING THERE: A SMALL INSIGHT INTO THE SPATIAL PARTICIPATION OF YOUNG ADULT IMMIGRANTS IN OLDENBURG'S PUBLIC SPACES

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COBISS 1.03

ABSTRACT

Taking Part and Being There: A Small Insight into the Spatial Participation of Young Adult Immigrants in Oldenburg's Public Spaces

Examining the role of urban spatiality for the integration of young immigrants is an emerging research field with the potential to provide important foundations for the implementation of integration policies and urban design. Current research in Germany on this subject focuses on large cities; this study adds insight instead into the context of a mid-sized city. The study asks: How do young adult immigrants participate in public spaces in Oldenburg? Results from five interviews show that the city center is connected to consumer purposes and social encounters in semi-public spaces. Study participants rarely use the public spaces in the city; instead, they favor the public green spaces on the outskirts.

KEYWORDS: participation, public space, young immigrants, mid-sized city, green spaces

IZVLEČEK

Sodelovati in biti zraven: Bežen vpogled v prostorsko participacijo mlajših odraslih priseljencev v javnih prostorih Oldenburga

Analiza rabe urbanega prostora pri integraciji mladih priseljencev postaja raziskovalno področje z velikim potencialom za implementacijo integracijskih politik in oblikovanje urbanega prostora. Trenutne raziskave tega področja se v Nemčiji osredotočajo na velika mesta, pričujoča študija pa prinaša vpogled v kontekst srednje velikega mesta. V njej se avtorici sprašujeta, kako mlajši odrasli priseljenci sodelujejo v javnih prostorih Oldenburga. Rezultati petih intervjujev kažejo, da je mestno središče povezano predvsem s potrošništvom in socialnimi stiki v poljavnih prostorih. Udeleženci ankete le redko uporabljajo javne mestne prostore; ljubše so jim zelene parkovne površine na obrobju mesta.

KLJUČNE BESEDE: participacija, javni prostor, mladi priseljenci, srednje veliko mesto, zelene površine

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INTRODUCTION

In 2014, the city of Oldenburg published a city development plan for 2025 (Stadt Oldenburg, 2014). Two of the main objectives declared in the report caught our attention: (1) embracing and using the diversity of Oldenburg's population as a potential for future development, referring to immigrated inhabitants; and (2) improving the quality of and creating new open urban spaces to stimulate public life (Stadt Oldenburg 2014: 46). But the objectives of the action plan do not reflect on the connections between migration and public urban spaces, and employees of the Office of Immigration and Integration of Oldenburg stated that young migrants receive little attention when it comes to social interventions and policymaking. However, it is of crucial importance to take the opinions and lived realities of the younger generation into account, because their participation in society and their civic engagement is formed by the spatiality that surrounds them. In contrast to major metropolitan German cities such as Berlin, Hamburg, and Hannover, there is a lack of literature concerning mid-sized or small cities, let alone concerning the experiences of young migrants who reside here. Therefore, located in Lower Saxony, the mid-sized town of Oldenburg is a particularly interesting site to be studied.

This paper contributes to human geography and migration studies by exploring the topic of the spatial participation of young adult immigrants in public spaces. Examining the role of urban spatiality for the integration of migrants is an emerging research field with the potential to provide important foundations for the implementation of integration policies and urban design. By putting these public spaces into focus, this paper wishes to add the perspectives of young immigrants through the following research question: How do young adult immigrants participate in public spaces in Oldenburg?

This research adopts a definition of participation as used by the PARTISPACE project: "Participation is a term for an individual's actions and practices in public space and the public sphere. This definition of participation entails taking part (= doing something with others) and being there (= being with others and being visible)" (Zimmermann et al. 2019: 13). For this study, we decided to adopt the following definition of public space: The PARTISPACE project defines "public spaces" as spaces that are "open and accessible", for example, "streets and squares in central parts of cities [...]" (Weintraub 1997; Lieberg 1992 as cited in Zimmermann et al. 2019: 21).

In Oldenburg, as in most cities, the city center accumulates a high number of semi-public places, whereas a lower density of semi-public areas characterizes the residential neighborhoods.

BACKGROUND

The trend to elaborate social issues through their spatial dimension has a long academic tradition in the social sciences. Yet, the main focus has shifted from mainly analyzing power structures to approaches that turn the attention on the agency of people and their daily activities.

Since the late 1990s, the spatial experience of youth has become a specific field of interest within the research on human geography and youth studies (Zimmermann et al. 2019). Researching youth participation in public space is essential, because "space is a (social) product" (Lefebvre 1991: 289). Spatial practices guarantee the (re)production of space, and therefore, space always embodies social relationships and is an expression of power relations.

De Certeau (1984) suggests a comprehensive distinction between "space" and "place". Place is characterized by its stability, whereas space is conceptualized in relation to the movements which take place in it: "In short, space is a practiced place" (De Certeau 1984: 117). De Certeau (1984) further points out how any kind of experience, even a simple being-there or seeing, is situated in a spatial context, which will influence the experience. All social practices take place in social spaces and are shaped by them.

An important theory in this context is the concept of "the right to the city", according to Harvey (2008), based on Lefebvre's initial conceptualization from 1968, which emphasizes the right of every inhabitant of a city to appropriate and transform space. For Harvey (2008: 23), the possibility to shape and transform our cities and ourselves is a fundamental and widely neglected human right. In his article, Harvey argues that urbanization leads to radical transformations in lifestyles (Harvey 2008: 24). Urbanization today is mainly guided by private interests: "Quality of urban life has become a commodity, as has the city itself, in a world where consumerism, tourism, cultural and knowledge-based industries have become major aspects of urban political economy" (Harvey 2008: 31). Freedom of choice is left solely to the ones who can afford it. Harvey concludes by claiming that the capital-driven developments of cities all over the world these days limit, even suppress, people to exercise their freedom of making and remaking their cities and themselves (Harvey 2008: 31). While Harvey does not explicitly focus on young people, Zimmermann et al. (2019) emphasize that it is vital for young people's participation to have free and open public spaces available to them.

In the past few years, a growing number of studies has adopted this perspective to the field of migration studies and explored questions such as: How do migrants make use of public spaces? How do they move within and use public spaces in their daily activities? What kind of obstacles or potentials do public spaces open up for them? (Breitfuss et al. 2006; Hertzsch 2010; Stapf, Siegert 2017).

Some researchers have analyzed the potential of public spaces in Germany to facilitate social integration for newly arrived people in urban settings. Overall, the

existing literature about public spaces in small German towns and villages is limited, while one could say that the literature taking state capital cities as study sites, such as Hannover and Hamburg, is abundant.

One study, by Belloni (2013), analyzes the spatial exclusion and appropriation of space of asylum seekers and refugees in Hamburg. Belloni (2013) defines three rings in the city: Places of control are in the central areas, places of socialization are in the second ring, and places of alienation, such as refugee accommodations, are in the third ring, far from the city center. Belloni finds that being present in and using public places can lead to a re-appropriation of the inner city and thus overcome spatial concentrations of marginality (2013: 119).

In line with this, another study by Janßen and Polat (2005) looked at the integration and marginalization of second-generation Turkish migrants in Hannover. Amongst other factors, they analyze the material, social, political, and symbolic dimensions of two neighborhoods. Their findings indicate that social networks within the neighborhoods, social and commercial infrastructures, and symbolic factors, such as the image of the neighborhoods, translate into the living conditions of the migrants.

Another metropolitan study in Berlin, by Stapf and Siegert (2017: 2), discusses the role of public green spaces for newly arrived refugees in the city. Public green spaces are thought to contribute to the mental and physical well-being of their users (Stapf, Siegert 2017). The study credits public green spaces as especially meaningful for socially and economically excluded people, as they are open to everyone and mostly free of charge. This research examines the potential of public spaces as meeting and recreation points for refugees. The aim is to illustrate how public areas can facilitate the social participation and integration of refugees within Berlin. On the other hand, Stapf and Siegert (2017) emphasize how public spaces reflect dominant power structures of society and, therefore, come along with certain fears and obstacles, especially for people with undecided residence permits.

While the research above looks explicitly at public space, our study includes the dimension of semi-public space. As argued by Zimmermann et al. (2019: 22), “public space is very much connected to a normative idea of inclusiveness. Everyone should be entitled to participate in the public on an equal basis”. While the opposite of a “public space” is a “private space”, spaces which are “intimate and close” such as homes (Weintraub 1997; Lieberg 1992 as cited in Zimmermann et al. 2019: 21), most spaces do not fall into either of these categories. Often occurring in literature is the example of restaurants with outdoor seating, where the seating space is in a public space. Yet, only restaurant paying clientele have full access to the seating spaces. Jones et al. (2015 as cited in Zimmermann et al. 2019: 21) point out that to mark this “limitation in publicness”, the prefix “semi” is often used. Following this pattern, this study uses the same definitions to refer to “public”, and “semi-public” spaces.

METHODS

We selected the research participants according to the following inclusion criteria: (1) the participants must have themselves migrated to Germany; therein, our research thus does not include second-generation migrants; and (2) the participants' ages should be between 18 and 25 years old. Further aspects, such as the legal status or the country of origin, were not criteria.

To recruit the research participants, we made efforts to gain access to the social networks of our target group in informal, interpersonal ways by attending several gatherings (either non-organized or organized by others) in public and semi-public spaces, such as: the community center of the Red Cross Oldenburg; a meeting for immigrants at the TV and Radio Station in Oldenburg; various restaurants; and the University of Oldenburg. In all these spaces, we randomly approached potential research participants, explained our research aim, and asked whether they wanted to participate.

We conducted four in-person, semi-structured interviews with young immigrants in Oldenburg. Two of the research participants are male and two are female, all aged between 22 and 25. They migrated to Oldenburg between 1.5 and 10 years ago from Iraq, Vietnam, and Iran.

At the time of the study, the research participants were the following ages: the first, a male Kurdish refugee, was 25 years old and had migrated from Iraq 1.5 years earlier; the second, a 23-year-old male Vietnamese student, had migrated to Oldenburg 3.5 years earlier; while the third, a 22-year-old female Vietnamese student, had migrated to Oldenburg 1.5 years earlier. Finally, the fourth research participant, then a 24-year-old student working at a bar, had migrated from Iran with her family as a child 10 years before the time of the study.

We also conducted an expert interview with two employees of Oldenburg's Office for Immigration and Integration. The two employees work in the field of Integration Service, focusing on the principles and concepts of migration and participation in the city of Oldenburg. We interviewed them to obtain additional information about existing initiatives directed at young adult immigrants and the use of public spaces in Oldenburg. The information gained in the latter interview is used as additional information in our research discussion but is not part of the primarily analyzed material.

A SMALL INSIGHT INTO LIVED REALITIES

Using the City's Spaces: The Outskirts Versus the City Center

Participants stated that the city center is a place to go to, and the outskirts are a place in which to live. When they talk about Oldenburg, they distinctly divide it into these two areas. The following quote illustrates this: "In the city center, more

people walk outside. On the outskirts, where I am living, few people go jogging; they mostly stay indoors.”

All the participants said they live away from the city center; however, they did not mention a feeling of marginality or alienation in connection to their residence on the outskirts, as suggested by Belloni (2013). A research participant stated: “I am living on the outskirts, but it is also near the city center. I still feel comfortable.”

According to the research participants, they mostly move within their own and their family and friends’ places of residence, the university, and workplaces. These private and semi-public places seem to be the main sites of social interactions and are situated outside of the city center. According to Belloni’s (2013) conceptualization of the three rings of the city situated between social inclusion and exclusion, this would be the second ring of the city. However, the research participants did not mention the third ring, places of alienation.

This phenomenon can be explained by the interview statements of the two employees of Oldenburg’s Office for Immigration and Integration. For example, Oldenburg is described by them as a decentralized city, with different community centers in each neighborhood. According to the employees, many inhabitants of Oldenburg stay within their neighborhoods since each area could be a city in itself, having all the necessary infrastructure. They explain that for many residents, there is no need to go into the city center as the neighborhood provides the basic necessities – except for extensive shopping. The decentralized structure is connected to Oldenburg’s investment into quarter management, the employees from the Office of Immigration and Integration concluded.

Granted, the sample of this research is very small. Still, we can assume that an asylum seeker would have perceived the reception center in Oldenburg as a place of alienation because its location is far away even from the city outskirts.

Nevertheless, the research participants did not provide specific information about their neighborhoods. This omission could indicate that they do not identify with their neighborhoods, but rather with the overall city of Oldenburg. While Janßen and Polat (2005) emphasize how the material, social, political, and symbolic dimensions of the neighborhoods translate into the living conditions of migrants, the research participants did not address these aspects.

While Stapf and Siegert (2017) emphasize the tensions that can emerge in public spaces due to the reflection of dominant power structures of society, such issues were not brought up by the interviewees. Our findings suggest that the interview partners prefer public spaces outside of the city center, because of the peacefulness.

Participants spoke positively about the quietness and comfort of the town, stating, for example: “It’s, ah, a nice city and it’s very [pause] ah, for example, when, if you want to live in silence, then it’s a good choose [sic] to live in Oldenburg. Even if you go to the city center, everything is ..., is like, ah, there is no, no mess.”

They describe Oldenburg as a calm and peaceful place, and there were no experiences of danger brought up in the interviews. Rather than the perception of

dominant power structures or social struggles, our participants expressed fear in public spaces such as streets at night, more explicitly, fear in dark and lonely places. One research participant said the following: "I live on the outskirts of the city, so biking home or through the forest at night is scary. I see some people sitting on benches smoking. I suppose they are kind of a gang." Another participant gave a similar statement: "Empty roads at night is a little scary to me. There are low light and few people outside, so we cannot get help if some bad accidents happen."

Unfortunately, the scope of our research did not allow us to further look into the topic of feelings of unsafety. Doing so might help us understand the cause of such feelings and perceptions. In any case, the issue of unsafety is often closely linked to the question of power relations and institutional power structures (Stapf & Siegert, 2017). Feelings of unsafety could derive from an unfamiliarity with the environment, but equally from a lack of trust in local institutions, such as the police. Therefore, we conclude that local policymakers should investigate the origins of feelings of (un)safety. This way, policies can be adapted to provide orientation and support newly arriving people in Oldenburg.

The City Center: Semi-Public Places for Functional Practices

When asked about public spaces, the participants spoke on multiple occasions about cafés, shops, and other facilities, in particular, in the city center. Strictly speaking, such places are not public but rather semi-public spaces. Participants did not mention any public spaces in the city center other than the city library and a language café established by the Red Cross.

We asked our participants whether they exercise any particular daily activities and had specific locations that they regularly frequent within the city center. The young immigrants we spoke with directly stated they spend very little time in the city center, because they live on the outskirts and are not familiar with what there is to do in the city center, and do not have any favorite restaurants or bars to visit. None of our interview partners referred to the city center as the location of daily activities. Instead, they portrayed the city center and its facilities as semi-public spaces of functional purpose. The participants frequent semi-public places in the city center when they have a specific task to complete, for instance, buying new shoes, and for social encounters, such as having a meeting in a café. One participant stated, "I don't go to the city often, because I focus on studying and exercising. On the weekend, I sometimes go shopping or [to a] café with friends." Another participant mentioned: "I sleep actually mostly till eleven and then meet up with some guys for coffee in the city [...]. Or just hang out in the bar, eating somewhere something." From the participants' accounts, they seem to be spending more time in semi-public spaces than in public spaces. Another participant shared: "I have little time in public spaces. I usually stay at the university and the sports center."

Participants' answers were uncertain in relation to when they considered which public spaces to frequent in Oldenburg. Participants said that they do not spend much time outside the home or workplace in Oldenburg, and by traveling to other cities or staying in places of nature on the outskirts on weekends, there is a general unfamiliarity with the city center of Oldenburg. One of these statements is as follows: "Because I was wondering when my family is going to visit me. What shall I show them, because, in Oldenburg, I don't know, there is not much stuff to show somebody. [Both laugh]. We have a castle; there is a museum. But yea, it looks like a house, it is not a castle! Then you have a park, and yea, that is it."

Furthermore, another participant expressed great knowledge and affection for things to do in other cities, but not in Oldenburg. The statement reads: "Yeah, and sometimes I ... go there [Hannover]. When I have time, I, maybe ... [go to] to Cologne. Sometimes, [...] other cities like Osnabrück and Bielefeld and Essen – Ah, I have planned to visit some islands here in the North."

The city center does not seem to hold any personal appreciation, nor any kind of emotional attachment or particular importance for the daily activities of our participants. The data suggests that social ties and emotional attachments are primarily located where the participants interact with family and friends. Such ties seem to be mainly in the areas of residence, so on the outskirts and not in the city center of Oldenburg, except for going to a café; as noted by a participant: "I have friends, they live in a village, it's also close to Oldenburg, it's about ... twenty minutes or maybe fifteen. And sometimes I went to them, I go to them and, yeah, but I always want to ... to not be in the city and around."

Participants also recounted that activities related to pursuing a hobby, such as taking walks in nature and photography, two of the mentioned hobbies, were done in public spaces on the outskirts of the city. When asked why they enjoyed these activities and hobbies, participants answered in various ways that it is because they spend time with friends and families. But it was directly stated by participants that they do not see the city center of Oldenburg as a place to practice these hobbies and activities.

Henceforth, we will point out the following connection between our findings and Harvey's (2008) considerations about "the right to the city". According to Harvey, urbanization has turned many city centers into hotspots of consumption, especially in the past few decades; most activities offered in city centers are based on monetary involvement. Free and unrestricted spaces for social encounters and activities have become more and more scarce. This shift seems to be the case for Oldenburg, too. Our participants link the city center with consumerist activities. Social encounters in the city center are connected to café visits and thus are based on monetary involvement in semi-public spaces.

While Belloni (2013) finds that being present in and using public places can lead to a re-appropriation of the inner city and thus overcome spatial concentrations of marginality, none of the participants expressed a feeling of marginality or the wish

to be more present in the city center. However, as the example of Oldenburg shows, places in nature offer the possibility of free and unrestricted spaces for social encounters and activities.

Being in Public Green Spaces

The analysis of the data disclosed another interesting finding: besides semi-public spaces and social interactions, the participants, on several occasions, spoke about places outdoors, in nature, such as parks, lakes, and the countryside. Interestingly, most of the mentioned places were situated outside of the inner-city circle, even though Oldenburg offers various green places in proximity to the city center. The participants experience these places as relaxing, as places in which to have a fun time at or to do some physical exercise. Some of the mentioned activities include biking, walking, taking pictures, camping, chilling, drinking with friends, and watching the sunset. For example, a participant said:

Pretty cool, you can just chill there (the Utkiek) in the summer. Some people are running there, that's it. And yea, it is pretty cool, you have beautiful sunset[s] mostly, or you can see the whole city. This is my favorite point... yes, in summer! But now it's too cold to be outside. But it (the Utkiek) is my favorite part; then, otherwise, we have the "Dobbenwiese". It is in this direction, [toward the city], there is like a huge grass place and old people are just hanging out and playing music.

The experiences connected to these public green spaces are mostly pleasant and linked to positive feelings. Diverse dimensions were expressed, including the aspect of keeping and respecting personal space, fresh air, and the presence of people. Overall, as put forward by Stapf and Siegert (2017), places in nature serve as meeting and recreation points. The public green spaces seem to contribute to the well-being of its users. Instead of wanting to spatially re-appropriate the inner city, as Belloni (2013) suggests, our participants seem to prefer the green outskirts to the inner city: "I always prefer to ... when I want to get out I don't want to be in the city center and ah, I want to, as I said, I like nature, and I want to see the, ah, [the countryside]", says a participant.

According to our research participants, climate conditions play an important role in their participation in public spaces. One participant expressed dislike for the cold season because it makes certain activities harder to do. Another participant's activities differed clearly throughout the seasons: "In winter, I go to the café or go shopping for clothes and necessary stuff. In summer, I join my friends to go camping around the lake and parks." In contrast, one participant mentioned being more likely to go to the city center in summer than in winter: "I spend more time there in summer than in winter. I go shopping, eat at some restaurants and go to the city library."

The usage of public space arises here where the city library is mentioned. However, the weather conditions this usage.

Social Participation in Different Spaces

While the interview participants did not express a particular appreciation for the city center of Oldenburg, they did relate many of their experiences in Oldenburg with people rather than with the materiality of the places themselves. The participants frequently refer to people when describing an experience in or about Oldenburg. The relationships expressed include friends, family, co-workers, acquaintances, or unknown inhabitants of Oldenburg.

The interviewees mentioned educational, employment, and social institutions as an important form of “semi-public” spaces used, for example, the workplace, the university, and the sports center, and it appears that most relationships established are born in these semi-public spaces.

For example, one stated in the interviews: “Yes, I meet many friends at the university and sports center.” Another participant explained: “In general, I mean the most people I know are from my classes or work. And mostly I think they are very friendly and open-minded, mostly. Except for maybe older people? [Laughs] Maybe like very old people. They are, I don’t know, maybe sometimes rude and stuff, but mostly I like the people.”

The data could, therefore, suggest that practices that involve other people are of greater importance to the participants than the specific place in which the activities occur. The places mentioned, therefore, can be seen as platforms and resources for social interactions.

Another key finding refers to the aspect of “being new”, or the experience of being a “migrant”, in Oldenburg. The participants emphasized the contact with people from Oldenburg and whether or not interactions with locals make them feel welcomed and included in Oldenburg. The participants often brought up the social aspect of public spaces. “To me, places don’t matter, but people there matter. If they are welcoming to me, I can feel included, and vice versa,” states one participant. Furthermore, another participant admits: “However, there are many older people here, so I feel a little isolated.” This account hints at possibly a disconnection between the youth and older generations.

A wish to learn the German language was also brought up as a means by which relationships are built. For example, through the language café in the community center of the Red Cross Oldenburg, a participant mentioned positive experiences of individual interactions with people in Oldenburg who taught him German:

The people that live in Oldenburg, ah, that I met, they, they, they made me feel, love the language because at first, I thought the language is very difficult, and they said if, because some people say, ah, German people are very, ah, very angry with other[s]

and here I saw the different things, and I saw that they are very good and friendly and want to help. And this way, I, I love to learn the language and ah, now I ... I speak German ... but not that good, but I will definitely, I will speak it very good.

In the context of Hamburg, Tenbuss (2017) observed that – despite adolescent refugees' efforts to participate in social spaces – they often remain outsiders. Although a certain awareness of "being new" is mentioned in relation to social interactions by our research participants, they did not explicitly state that they perceive themselves or feel that others perceive them as outsiders. In this aspect, our findings do not correspond with the observations of Tenbuss (2017). At the same time, we have to keep in mind the limited comparability of the target groups of our research and Tenbuss's research that focuses specifically on refugees. Moreover, Tenbuss (2017) discusses different barriers to societal participation, which are mainly cultural and linguistic limitations. One of our interview participants commented on language, however, not as a barrier, as suggested by Tenbuss (2017), but rather as a way to connect with the people of Oldenburg in the process of learning the language.

CONCLUSION

The research explored the participation of young migrants in public spaces in Oldenburg, guided by the following research question: How do young adult immigrants participate in public spaces in Oldenburg?

The participants mentioned only two public spaces in the city center: the city library and the Red Cross community center. Overall, they brought up semi-public spaces much more than public spaces. The data suggests that the research participants define their spatial practices in relation to the social interactions which take place within these spaces. Participation in public and semi-public spaces is linked to social encounters and activities with other people. Rather than the city center, the outskirts constitute spaces of daily activities (e.g., studying, working, and doing sports). The findings of this research emphasize the importance of public spaces in nature for participation; this contradicts the initial assumption of this research that public spaces would occur in the city center. Green public places are spaces for hobbies, leisure, and social activities; however, participation within these public spaces depends on climate conditions. The research participants hardly expressed any particular emotional attachment, or any daily activities attached to the city center. The city center and its facilities are mostly portrayed as semi-public places with a functional purpose and linked to consumption. The research participants did not experience feelings of marginalization or alienation, and they portrayed Oldenburg as a city and its inhabitants as welcoming; however, they described interactions with older inhabitants of Oldenburg as less friendly.

Due to the limited scope of this research, the findings do not aim to generalize the perceptions and experiences of young immigrants; instead, they intend to give a small insight into the experiences of these immigrants' in a mid-sized town and to lay a basis for further research. If this research were to be conducted on a larger scale, the findings of the study could have several practical implications, especially for local authorities and institutions to adapt their policies to young immigrants' perspectives and desires. Continued efforts are needed to make Oldenburg more accessible to newly arrived people, in addition to promoting their participation.

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POVZETEK

SODELOVATI IN BITI ZRAVEN: BEŽEN VPOGLED V PROSTORSKO PARTICIPACIJO MLAJŠIH ODRASLIH PRISELJENCEV V JAVNIH PROSTORIH OLDENBURGA

Sofia MORALES, JULIA SÖHNHOLZ

Analiza rabe urbanega prostora pri integraciji mladih priseljencev postaja raziskovalno področje z velikim potencialom za implementacijo integracijskih politik in oblikovanje urbanega prostora. Članek k študijam migracij prispeva raziskavo o udeležbi mlajših odraslih priseljencev v javnem prostoru. Dosedanje raziskave vloge javnega prostora v življenju priseljencev v Nemčiji so se osredotočale na večje deželne prestolnice, kot sta Berlin in Hamburg. Literature o srednje velikih in manjših mestih primanjkuje še zlasti v povezavi z mladimi priseljenci. Članek želi to vrzel zapolniti, zato obravnava percepcije in vsakdanje življenje mlajše generacije v srednje velikem nemškem mestu Oldenburg na Spodnjem Saškem. V študiji, ki izhaja iz de Certeaujeve konceptualizacije prostora (1984) in Harveyjeve »pravice do mesta« (2008), si avtorici zastavljata vprašanje: kako v Oldenburgu mlajši priseljenci uporabljajo javni prostor?

Študija temelji na analizi štirih poglobljenih intervjujev z mladimi priseljenci, starimi med 22 in 25 let, ki so se v mesto pred poldrugim letom oziroma desetimi leti priselili iz Iraka, Vietnama in Irana. Avtorici sta intervjuvali tudi dva zaposlena na Mestnem uradu za priseljence in integracijo. Intervju je razkril, kako malo pozornosti so mladi priseljenci deležni pri družbeni intervenciji in oblikovanju urbane politike. Po rezultatih sodeč udeleženci študije le redko uporabljajo javne prostore; mestno središče je namenjeno predvsem zadovoljevanju potrošniških potreb in družabnih stikov v poljavnih prostorih, kot so npr. kavarne, življenje in dnevne dejavnosti pa se dogajajo na mestnem obrobju. Bolj kot mestno središče mladi priseljenci v prostem času uporabljajo zelene površine na obrobju. Lahko bi rekli, da je socialni vidik prostora pomembnejši od njegove materialnosti.

Intervjuvanci so Oldenburg in njegove prebivalce opisali kot prijateljske, kot manj prijazne doživljajo le stike s starejšimi meščani. Avtorici z dobljenimi rezultati ne želita posploševati izkušenj mlajših odraslih priseljencev, temveč podati le bežen vpogled v njihove izkušnje z življenjem v srednje velikem mestu in z njimi prispevati k nadaljnjim raziskavam. Rezultati širše zasnovane študije bi lahko imeli številne praktične posledice, še zlasti bi z večjim upoštevanjem potreb mladih priseljencev lahko vplivali na krajevno politiko.

KITAJSKI MIGRANTI IN COVID-19: MOBILNOST IN IZKLJUČEVANJE MED PANDEMIJO

Martina BOFULIN¹

COBISS 1.01

IZVLEČEK

Kitajski migranti in covid-19: Mobilnost in izključevanje med pandemijo

Prispevek prinaša analizo mehanizmov izključevanja kitajskih migrantov med pandemijo covid-19. Avtorica najprej pokaže na značilnosti izključevanj in diskriminacije, s katerimi so se soočili kitajski migranti po izbruhu virusa tako v državah priselitve, v transnacionalni skupnosti in tudi ob povratku v državo izvora, kot tudi odzive na tovrstna dejanja med migranti. Avtorica ugotavlja, da so prav vsem oblikam izključevanja podložene specifične predstave o mobilnosti ter da je učinek tovrstnih izključevanj med drugim tudi reinterpretacija razmerja med dvojico »migrant – državljan«.

KLJUČNE BESEDE: kitajske migracije, covid-19, pandemija, diskriminacija, razizem

ABSTRACT

Chinese Migrants and COVID-19: Mobility and Exclusion in the Time of Pandemic

The article analyzes the practices of exclusion and discrimination against Chinese migrants in the time of the COVID-19 pandemic. It highlights the mechanisms of exclusion towards Chinese migrants in the countries of settlement, the country of origin and their transnational communities as well as the resistance to discrimination. The author connects these practices to specific sets of mobility imaginaries and speculates about the effects of such exclusions in rearranging the relationship between the conceptual pair "migrant–citizen".

KEYWORDS: Chinese migration, COVID-19, pandemic, discrimination, racism

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UVOD

Še pred razglasitvijo covid-19 za pandemijo 11. marca 2020 je nalezljiva bolezen zaustavila do tedaj običajni vsakdanjik. Globalna logistika ljudi in predmetov je skoraj čez noč zamrla v upanju, da bo zamrlo tudi širjenje virusa SARS-CoV-2. Nenadna in nepričakovana tišina, ki je nastala, je posledično izpostavila (ne)mobilnost kot enega nujnih elementov sodobnosti. Več kot desetletje star zapis priznanega raziskovalca mobilnosti Tima Cresswella se zdi skoraj preroški: »[...] mobilnost je arterija sodobnosti, kot tudi virus, ki grozi njenemu obstoju« (Cresswell 2006: 21). Pojasnil je, da je virus takrat uporabil kot metaforo za motnjo oz. turbulenco, kot jo je imenoval, obstoječim vsakodnevnim mobilnostim. Te so nam bile še do nedavnega samoumevne (Cresswell 2020). Z metaforo je želel ponazoriti, da naša življenja slonijo na samoumevni premisi, da je gibanje (ljudi, stvari, finančnih tokov itd.) vedno urejeno in predvidljivo. Kljub temu pa vsako gibanje vsebuje tudi potencial za motnjo, zaradi česar »turbulenca ni pokazatelj, da je sistem odpovedal, temveč da deluje« (ibid.).

V tem smislu je sedanja pandemična turbulenca priložnost za spoznavanje logike in delovanja poznokapitalističnih sistemov, kjer hipermobilnost ni (bila) nujna samo za delovanje globalnega ekonomskega sistema, temveč tudi glavno gonilo sanj in aspiracij po boljšem življenju. Raziskovalcem migracij trenutni »zapik« omogoča prav poseben vpogled tako v neenakosti, ki jih mobilnost poraja, kot tudi v kategorialni aparat, ki deluje kot osnova za razvrščanje mobilnih človeških usod. V članku tvorjenje in vzdrževanje neenakosti med pandemijo opazujem iz izkušenj kitajskih migrantov v treh različnih družbenih arenah: v državah priselitve, v njihovih transnacionalnih skupnostih in v izvorni državi. V zadnjih desetletjih so številni prebivalci Kitajske postali zelo mobilni in so vzpostavili veliko medregionalnih in medcelinskih povezav, hkrati pa se soočajo z različnimi izključevalnimi govori, med drugim o »prenašalcih virusa« (pred covidom-19 že med izbruhom virusa SARS), ki je v mnogočem že nešteta ponovitev diskurza o »rumeni nevarnosti«. Ker naj bi virus SARS-CoV-2 izbruhnil v kitajskem mestu Vuhan¹ ob koncu leta 2019,² pa so bili tokrat postavljeni ne samo v samo središče razvoja pandemije, temveč tudi v središče govora o njej. Kot opozarja Cresswell (2020), so tako v preteklosti kot danes krivdo za bolezen pripisali ljudem od drugod, ki so jih že pred tem povezovali z različnimi negativnimi lastnostmi. Ti diskurzi z zelo realnimi učinki ne ogrožajo samo ekonomskega preživetja skupin in posameznikov, temveč pogosto tudi njihovo fizično varnost: v zadnjih mesecih so bili posamezniki, na različnih delih sveta prepoznani kot »Kitajci«, tudi žrtve fizičnih napadov (Cheung, Feng, Deng 2020; Stolton 2020). Kitajski migranti se ne soočajo zgolj z izključevanjem v okoljih priselitve, kjer to običajno temelji na

1 V članku za transliteracijo kitajskih besed uporabljam mednarodno uveljavljeni sistem zapisa *pinyin*, razen v primerih, ko sta beseda ali poimenovanje poslovenjena (npr. mesto Vuhan, ki se v *pinyinu* zapisuje Wuhan).

2 Podatek o mestu in času izbruha SARS-CoV-2 povzeman po uradni razlagi Svetovne zdravstvene organizacije z dne 1. 5. 2020.

rasizmu, temveč tudi v svojih skupnostih in ob povratku »domov«, v izvorno državo, kjer pa je izključevanje drugače formirano. V članku analiziram načine izključevanja, ki so med pandemijo še zlasti očitni, in se sprašujem o povezavi med izključevanjem in predstavami o mobilnosti v celotnem migracijskem procesu.

Kitajski migranti, ki jih vzpostavljam kot enoto analize, so zbirna kategorija za raznolike skupine ljudi, ki izhajajo iz Ljudske republike Kitajske. Med njimi se številne ločnice vzpostavljajo ob robu državljanstva (naturalizacija ali ohranitev izvornega državljanstva), načina migracije, finančnih zmožnosti oz. pripadnosti družbenemu razredu, lokaciji izvora na Kitajskem in življenjskem stilu. Smiselni je premislek o upravičenosti oz. celo smislu izbora tako neenotne enote analize, še zlasti glede na pozive o preseganju metodološkega nacionalizma (Wimmer, Glick Schiller 2002), ki najpogosteje »domuje« prav v izpostavljanju določene skupine migrantov in omejitvi družbenih svetov subjektov na lastno skupino ali meje države priselitve. V tem primeru nam osredičenje na kitajske migrante omogoča vpogled v številne, čeprav različne mehanizme izključevanja na vseh relevantnih »lokacijah« migracijskega procesa – v državi izselitve, državi priselitve kot tudi v transnacionalnih družbenih prostorih – ki so v veliki meri postali tako očitni prav zaradi izbruha virusa na Kitajskem.

Metodološko članek temelji predvsem na podatkih, ki sem jih pridobila po elektronskih medijih – med januarjem in aprilom 2020 sem spremljala razprave in objave na kitajskih socialnih omrežjih (Wechat) in drugih medijih (mikroblogovska platforma Weibo, kitajski in nekitajski spletni portali in časniki). Po socialnih omrežjih sem zaradi ukrepov prepovedi gibanja za zajezitev covid-19 v Sloveniji stopila v stik s sogovorniki iz predhodnih raziskav. K pisanju članka me je spodbudila vest, da je marca 2020 zaradi covid-19 preminil sogovornik iz preteklih raziskav, ki mi je nudil namestitev na Kitajskem med enim izmed mojih raziskovalnih obiskov. Ta zapis zato posvečam njemu in številnim drugim migrantom, ki jim je pandemija covid-19 na tak ali drugačen način posegla v njihova življenja.

»JAZ NISEM VIRUS, SEM OSEBA« – DISKRIMINIRANI KITAJSKI PRISELJENCI

Kmalu po prvih informacijah o širjenju skrivnostnega virusa v provinci Hubei na Kitajskem januarja 2020 so se pojavila poročila iz različnih delov sveta o primerih rasizma in ksenofobije, usmerjenih proti osebam kitajskega izvora oz. s kitajskim ozadjem. Previdni odzivi v obliki fizičnega oddaljevanja, za katerega se je med pandemijo uveljavilo poimenovanje »družbeno oddaljevanje«, od posameznikov, zaznanih kot »Kitajci«, in verbalni napadi nanje so kmalu prerasli v fizično agresijo. V grobem bi dejanja lahko razvrstili v tista, ki ogrožajo ekonomsko dejavnost priseljencev, in tista, ki ogrožajo njihovo fizično varnost.

V prvo skupino sodi prenehanje obiskovanja kitajskih restavracij in trgovin, saj se nanje gleda kot na žarišča prenosa virusa. O praznih restavracijah, izginotju vrst pred vhodom in upadu rezervacij so še pred uveljavitvijo ukrepov za preprečevanje

širjenja virusa poročali tako v Evropi, Avstraliji kot ZDA (glej raziskavo vedenja potrošnikov Ipsos Mori 2020), čeprav je obseg upada števila gostov in zaslužka težko oceniti. Raziskava, ki jo je v ZDA izvedel Wompy, ameriški ponudnik programske opreme za majhna podjetja, je odkrila povezavo med »odkritjem« prvega primera koronavirusa v ZDA in upadom obiska kitajskih restavracij, ne pa tudi drugih restavracij, zaradi česar je zaključila, da lahko govorimo bolj o ksenofobiji kot germofobiji (Wompy 2020). Poleg upada obiskov so se pojavili tudi aktivisti, ki so aktivno pozivali k blokadi kitajskih lokalov. V severni Italiji na primer so se na kitajskih trgovinah čez noč pojavili plakati z logom ekstremistične skupine Forza Nuova: »Koronavirus? Kupujte italijansko. To je naša moralna dolžnost« (Liu 2020).

Med izključevalnim vedenjem je bilo opazno izogibanje osebam, zaznamim kot »Kitajci«, mdr. v zdravniških ordinacijah, javnem prometu ter v šolah, tako v Evropi kot tudi ZDA in Avstraliji (Campbell 2020; Govan 2020). Prav tako so bili (kitajski) pri seljenci tarča številnih verbalnih napadov tako v vsakdanjem življenju kot na svetovnem spletu in socialnih omrežjih (Macquire 2020). Diskriminatorni in rasistični pozivi pa se niso pojavljali zgolj med »nepoučeno množico«, temveč so jih razširjali tudi predstavniki oblasti. Mednje se na primer uvršča zapis župana severnoitalijanskega kraja Solto Collina Maurizia Estija: »Ti j***** Kitajci, oni jedo vse. Netopirje, kače, pse in insekte, oni bi morali biti edini, ki bodo umrli v tej epidemiji« (Puente 2020). Vsaj v Italiji ta kritika ni bila osamljena. Tudi zaradi tovrstnega govora predstavnikov oblasti se napadi niso ustavili le pri žaljivkah, temveč so ponekod prerasli v fizično nasilje.

Dejanja, naperjena proti »prenašalcem virusa«, niso bila usmerjena zgolj proti Kitajcem, temveč kar proti vsem osebam s sorodnim fenotipom; med žrtvami so bili Japonci, Filipinci, Tajci, Korejci, seveda pa tudi Italijani, Angleži, Nemci in pripadniki drugih narodnosti s predniki iz Azije. Storilcev tudi ni zanimalo, ali so bili ti ljudje sploh v tujini ali imeli stike z nedomačini. Skladno s klasičnim pojmovanjem rasizma je že »vidna razlika« akterja zadoščala za pripis tujosti in posledično nevarnosti. Tako so v bližini Milana napadli Filipinko, za katero so menili, da je Kitajka (CNNPhilippines), vandalizirane so bile japonske restavracije (The Straits Time), v Londonu je moral, da ne bi prestrašil obiskovalcev, odstopiti vietnamski kustos umetniškega sejma (Busby 2020), če omenim le nekaj primerov. Tak odziv je samo okrepljena različica odnosa do ljudi azijskega porekla med letoma 2003 in 2004, ko se je svet spopadal z epidemijo virusa SARS (Hung 2004; Leung 2008) ali bubonske kuge na Havajih in v ZDA na prelomu stoletja (Kalisch 1972). Tudi takrat je bilo mogoče opaziti presenetljivo podobne odzive večinske družbe do oseb kitajskega / azijskega videza. Tovrstna izključevanja se tudi danes v veliki meri okoriščajo z elementi rasističnega diskurza o »rumeni nevarnosti«, prisotnem v družbah t. i. Zahoda že vsaj 150 let.

Kot odziv na tovrstne napade je vzniknila kampanja »Jaz nisem virus«. V Italiji je Massimiliano Martigli Jiang, ki se je v Italijo kot sedemletni otrok priselil iz province Zhejiang na vzhodu Kitajske, na socialnih omrežjih začel objavljati kratke posnetke. V njih pred različnimi turističnimi znamenitostmi Firenc z masko in s prevezo čez oči stoji ob dvojezičnem napisu »Jaz nisem virus, sem človek. Osvobodite se

predsodkov.« (*Io non sono un virus, sono un essere umano. Liberami dal pregiudizio. / Wo bu shi bingdu, wo shi renlei. Bu yao dui wo you qishi.*) Objave so dosegle širok krog uporabnikov spleta in socialnih omrežij ter sprožile spontano javno podporo proti nadaljnji diskriminaciji (Chen 2020). Podobno so mladi Francozi azijskega porekla začeli kampanjo *#JeNeSuisPasUnVirus*, da bi opozorili tako na javne diskurze kot tudi vsakodnevne izkušnje ksenofobije do oseb azijskega videza v francoski družbi (Coste 2020). Odzivi na pandemijo tako nadaljujejo prizadevanja priseljencev iz Kitajske in drugih delov Azije ter njihovih potomcev za enakovreden položaj v evropskih družbah priselitve.

Poleg aktivističnega boja proti diskriminaciji pa so odzivi kitajskih priseljenjskih populacij v Evropi zaznamovani tudi s skrbjo pred širjenjem nadaljnje okužbe in previdnostjo. Ker je izbruh virusa na Kitajskem časovno sovpadel s prazniki ob lunarnem novem letu, ko so mnogi obiskali svoje sorodnike na Kitajskem, so bili ob povratku v Evropo zelo zaskrbljeni zaradi manjka ukrepov za zaježitev širjenja virusa. V Italiji naj bi se po poročanju medijev številni takoj po prihodu iz Kitajske zaprli v strogo samoizolacijo, otroci pa so prenehali obiskovati šole že tedne pred njihovim uradnim zaprtjem (Ceccagno, Salvati 2020). Zato naj bi npr. mesto Prato, kjer živi največje število kitajskih priseljencev v Italiji, ne imel niti ene same okužbe s covidom-19 (Ognibene 2020).

Podobno je bilo opaziti tudi v Sloveniji. V več primerih so kitajski priseljenci, ki so se februarja vrnil iz Kitajske, poskušali stopiti v stik z odgovornimi na Letališču Jožeta Pučnika ali pa s Kliniko za infekcijska obolenja. Ker v tistem času še ni bilo ukrepov za zaježitev covid-19, so ostali prepuščeni sami sebi. Po platformi Airbnb so najeli stanovanja in se za 14 dni zaprli v samoizolacijo, medtem ko so jim domači zgolj prinašali hrano, in to tako, da z njimi niso prihajali v stik. Mnogi izmed kitajskih priseljencev tudi v času ukrepov za zaježitev virusa niso zapuščali svojih bivališč niti za odhod v trgovino ali na sprehod.³ Kitajski migranti v Sloveniji in tudi drugje so torej prakticirali fizično oddaljenost in izolacijo kot zaščito zase in za sredine, v katerih prebivajo, še preden je to postal eden pglavitnih ukrepov številnih držav proti širjenju virusa. Kljub temu je bila tovrstna »družbena odgovornost« povečini spregledana, še več, nakupovanje in nošenje zaščitnih mask sta bila pogosto tolmačena ravno obratno; prvo kot špekuliranje za poznejšo prodajo, drugo kot priznanje, da so virus širili prav oni (Weale 2020).

Kljub temu da nekateri kitajski migranti in njihovi potomci že desetletja prebivajo v državah priselitve, so pridobili državljanstvo in se počutijo kot domačini ali pa so se v teh državah celo rodili in odrasli, so čez noč postali tisti, ki se jih je treba izogibati in bati. Rasizem se je silovito dvignil nad tiste, ki jih večinsko prebivalstvo na podlagi zunanjšega videza uvršča v skupino »od drugod« in jim zato pripisuje mobilnost in s tem tudi večjo bližino virusa.

3 Podatki so bili v neformalnih pogovorih s sogovorniki v Sloveniji pridobljeni februarja, marca in aprila 2020.

»ČE NE ZMORETE SOČUSTVOVATI ALI POMAGATI, VSAJ NE POVZROČAJTE ŠE VEČ GORJA« – IZKLJUČEVANJE ZNOTRAJ SKUPNOSTI

Poročanja o ksenofobiji in rasizmu, s katerimi so se morali med pandemijo soočiti kitajski priseljenci v državah naselitve, so po množičnih medijih dosegla širok spekter javnosti tako v državah priselitve kot tudi na Kitajskem. O procesih v priseljenskih skupnostih, kjer so posamezniki ali družine lahko zaradi suma o kužnosti ali prisotnosti koronavirusa prav tako izključeni, pa vemo bistveno manj. Morda so to najboljčutljivejše oblike izključevanj, ki posežejo globoko v posameznikovo intimno sfero in njegovo najožjo družbeno mrežo. To niso dejanja verbalnega in fizičnega nasilja, temveč »tiho izključevanje«, predvsem v obliki govoric, ki se širijo ne samo v kraju priselitve, temveč tudi v kraju izvora in v celotnem transnacionalnem prostoru, ki ga določena skupnost vzdržuje. Kot menita Ron Barrett in Peter Brown (2008), je stigma zato več kot le negativen sopojav določenih bolezni, saj deluje kot posebna vrsta bolezni in ima lahko tudi podobne smrtonosne učinke kot »fizična« bolezen, zaradi katere se je pojavila. V nadaljevanju navajam primer, ki je močno odmeval na različnih lokacijah transnacionalnega prostora Qingtiancev, številčne skupine kitajskih migrantov v Evropi, s katero jih povezuje več kot stoletna migracijska zgodovina.

Marca 2020 je po kitajskem socialnem omrežju Wechat zaokrožila fotografija urejenega starejšega para, fotografranega pred neimenovano fontano. Na fotografiji je bilo v kitajskem jeziku zapisano ime moškega s podatki, koliko let je preživel v Evropi in da je pred nekaj dnevi v bolnišnici v velikem evropskem mestu preminil kot »prva žrtev covid-19 med kitajskimi priseljenci v Evropi«. Obširni intervju s hčerka para, objavljen na straneh uradne skupine Weicheng na Wechatu, namenjene kitajskim priseljencem v Evropi, ne pojasnjuje samo okoliščin njegove bolezni, temveč tudi odzive skupnosti na prisotnost covid-19 med njenimi člani (Weicheng 2020).

Par se je sredi februarja 2020 udeležil dvotedenskega križarjenja po Mediteranu. Že ob odhodu naj bi gospod trpel za bronhitisom, njegovo stanje se je nekaj dni po prihodu na ladjo izboljšalo. Pred koncem križarjenja pa je zopet začel kašljati. Dobil je vročino, za katero so mu na ladji priporočili protivročinska zdravila. Ker se je v tem času o izbruhu virusa veliko govorilo tudi v Evropi, jima je hčerka po posvetu z družino in s poslovnimi partnerji predlagala, da gresta po vrnitvi domov v strogo samoizolacijo. Po njenem pričanju starši sicer niso sumili, da so okuženi, vendar so se strinjali s predlaganim ukrepom. V ta namen je hčerka najela nadstropje v hiši na obrobju kraja prebivanja in pripravila potrebno hrano, razkužila in druge stvari za njuno izolacijo. Po izkrcanju se je par s skupnim večurnim avtobusnim prevozom vrnil na izhodiščno točko ter se s taksijem pripeljal do najetega stanovanja. Oba sta se v naslednjih dneh počutila vse slabše, zato je hčerka poklicala rešilca. Odvzeli so jima vzorce za test o prisotnosti virusa SARS-CoV-2; pri obeh je bil izvid pozitiven. Odpeljali so ju v bolnišnico, kjer je on že čez nekaj dni umrl. Že takoj po njuni hospitalizaciji se je novica o njuni bolezni bliskovito razširila po spletu, predvsem po različnih skupinah na socialnem omrežju Wechat in predvsem med člani qingtianskega transnacionalnega prostora.

Po poročanju omenjenega medija so se začele vrstiti obtožbe na njun račun, češ da sta se na poti nazaj ustavila pri prijateljih v manjšem mestu in tudi tam morebiti okužila ljudi, da sta se po vrnitvi družila s prijatelji, da sta obiskala tržnico, predvsem pa, da sta bila v stiku z družinskimi člani in sta še naprej delala v družinskem podjetju. Hči je vse obtožbe zavrnila in novinarju pokazala dopisovanje s starši, ki naj bi dokazalo, da se je, čeprav ji je bilo zelo težko, stiku z njima izogibala:

Medtem ko sem sedela v svojem avtu, sem videla svoja starša, kako bleda in tresoča le s težavo nosita prtljago do hiše. Jaz pa sem ju lahko le gledala od daleč! [...] Nihče ne more razumeti, kako grozno sem se počutila in kako sem si želela, da bi jima prihitela pomagat! Zelo, zelo sem trpela, vendar sem se zadržala. Vedela sem, da bi bilo potem vse to zaman! (Weicheng 2020)

Hči je zatrdila, da starša nista bila v stiku z nikomer, predvsem zato, ker sta hotela »ohraniti obraz« (tj. ohraniti čast in dobro ime) ter se ne izpostaviti z morebitno prisotnostjo virusa. Najbolj pa naj bi jo prizadele zlobne misli posameznikov, ki so na medmrežju na primer zapisali: »Da v tem času odideš na križarjenje! Če sta že morala oditi, zakaj nista raje kar tam umrla in se ne vračala ...« Kot je povedala novinarju, je bila zaradi takšnih zlobnih govoric popolnoma obupana. Po njenem mnenju bi take male skupnosti morale v času preizkušenj stopiti skupaj, predvsem pa upati, da pacienti okrevajo, ne pa sprožati novih govoric in prizadejati še več bolečine. Prav tako je izrazila veliko zaskrbljenost, da bodo za vse prihodnje okužbe v mestu okrivili njena starša. Svojo pripoved je končala z besedami:

kljub temu da smo upoštevali zaščitne ukrepe, smo tudi mi sedaj nesrečne žrtve, ki jih želijo vsi kaznovati. Ne strinjam se s tem, da je bila moja družina zaradi diagnoze osramočena. Sedaj se počutim le žalostno in obupano. Ne samo, da sem prizadeta jaz, moja družina in vsi okoli mene so prizadeti! [...] V tem trenutku bi vsakdo moral krepiti svojo imunost in paziti nase, ne pa razmišljati o tem, kako bo prizadel druge. Če ne morete sočustvovati ali pomagati, vsaj ne povzročajte še več gorja. (Ibid.)

Kot je bilo zapisano v uvodu internetnega članka, je namen intervjuja »pojasniti dejstva« okoli pojavljajočih se govoric. Hkrati je obsežen del poročanja namenjen prikazovanju pravilnega vedenja ob srečanju z virusom. Ta prikaz med drugim kritizira lokalno prebivalstvo, vključno z zdravstvenim osebjem, ker niso nosili mask in druge zaščitne opreme in niso bili pripravljene na ravnanje s pacienti, obolelimi za virusom. Hkrati zapis tudi sporoča, da ne par in ne njuna družina nista v ničemer ogrozila drugih pripadnikov skupnosti ali sokrajanov. Še več, glede na poročanje bi z zelo strogimi ukrepi, ki so jih samoiniciativno izvedli, lahko bili tudi zgled za soočanje z virusom, ki svojih žrtev ne izbira.

Pritisk članov skupnosti in posledična stigma sta presenetljiva le na prvi pogled. Kot je zapisal že sociolog Erving Goffman (v Pescosolido, Martin 2015), žrtve

stigmatizacijo vedno občutijo v konkretnih družbenih odnosih, sama stigma pa je kontekstualna, vezana na specifični prostor in čas ter arbitrarna, razkriva pa prelome, ki se pojavljajo v določeni družbeni skupini. Zaradi tega skupnosti za svoje člane niso vedno varen pristan, temveč polje številnih in kompleksnih iger moči. Poleg tega na migrantske skupnosti vpliva tudi marginalen in podrejen status v večji družbeni enoti (npr. državi priselitve), kjer pripadniki Drugega dobro vedo, da so vedno opazovani ter da so njihova dejanja vedno pod drobnogledom. Takšna razmerja moči med krizo, kot je pandemija, postanejo še izrazitejša. Gre za nasilje, ki rodi nasilje, take skupnosti namreč pogosto stigmo, ki so jo deležne »od zunaj«, tj. od večinske družbe, usmerijo »navznoter«, tj. proti svojim članom.

»VELIKI OTROCI« – KITAJSKI IZSELJENCI SE VRAČAJO DOMOV

Potem ko je kitajska vlada 18. marca 2020 objavila, da v državi ni več lokalnega prenosa okužbe virusa SARS-CoV-2 (Reuters), se je država kmalu soočila z domnevnim naraščanjem t. i. »uvoženih« primerov. Virus naj bi namreč prenašali ljudje, ki so se na Kitajsko vračali iz tujine. Med temi bi lahko razločili tri skupine. Največ je bilo študentov, ki so se na Kitajsko iz tujine vračali po prekinitvi študijskega procesa ali pa so se morda morali izseliti iz študentskih namestitev, morda pa se v državah študija niso počutili varne (npr. zaradi diskriminacije ali preveč milih ukrepov za zajezitev virusa; Weale 2020). V drugi skupini so bili kitajski izseljenci, ki so se vrnili predvsem zato, ker so v tujini zaradi protikoronskih ukrepov izgubili službo ali zaradi družinskih obveznosti. V tretji, najmanjši skupini so tuji državljani nekitajskega porekla, ki bivajo ali delajo na Kitajskem. Ukrepi za preprečevanje širjenja virusa, ki so naslavljali povratnike, so bili sprva precej ohlapni, vendar pa je zaradi naraščanja »uvoženih« primerov in izogibanja prostovoljni karanteni država hitro napovedala dosti strožje ukrepe in tudi javno poudarila odgovornost povratnikov v boju proti virusu (Qiu, Yue 2020).

V istem času so se na spletu in socialnih omrežjih pojavili posnetki posameznih povratnikov, ki se ukrepov proti širjenju virusa bodisi niso držali bodisi so bili do njih kritični. Teh nekaj primerov, ki so preplavili medijsko krajino, je povzročilo histeričen odziv uporabnikov socialnih omrežij in mikroblogovskih platform. Srd t. i. kitajskih netizenov je na Kitajskem močno orodje javnega mnenja, ki ga ne more spregledati niti oblast (Zhou 2011). Najmočnejši odziv sta povzročila posnetka mlajših povratnikov iz Italije. Na prvem moški v kitajskem jeziku s qingtianskim naglasom pokaže razmere na letališču ob vrnitvi v državo, kjer je zaradi testiranja prišlo do gneče in večurnega čakanja v (pre)tesnih prostorih. Na posnetku komentira: »Poglejte [...] Nas, ki smo se vrnili iz Evrope, tako tretirajo ... (Kankan [...] *Women cong Ouzhou huilaide daiyu shi zheyangde* ...) (Youtube 2020a). Na drugem posnetku je mlajša ženska, ki je, glede na posnetek, po vrnitvi iz Italije v karanteni in prosi varnostnike, če bi ji lahko prinesli ustekleničeno vodo. Pogovor prerase v prepir, ko jo varnostniki podučijo, da

je v karanteni in ne v hotelu, ona pa odgovori, da ima kljub temu (človekove) pravice (Youtube 2020b). Spletni uporabniki jeze niso usmerili le na ta dva posameznika, temveč kar na vse izseljence in študente na študiju v tujini, jih proglasili za vzvišene in jih poimenovali 'veliki otroci' (*juying*);⁴ nevhvaležno naj bi se obnašali do domovine, ki jih je sprejela (Wang, Leng 2020). Na mikroblogovski platformi Weibo sta v trenutku veliko število komentarjev pritegnili temi »Kitajska ne bo skrbela za velikanske otroke« (*Zhongguo bu yang juying*; Weibo 2020a) in »Nas iz Evrope tako tretirajo« (*Cong Ouzhou huilaide jiu shi zhege daiyu*; Weibo 2020a). Številne objave pod temama izražajo jezo do izseljencev in jih pozivajo, naj se vrnejo tja, od koder so prišli (*cong na er lai hui na er qu*): »Ko so zaradi epidemije doma razmere resne, zbežite v tujino. Ko se vrnete, pa ne sodelujete z oblastmi, imate izbruhe in zahtevate privilegije. Ali ne bi bilo bolje, da greste nazaj?« (Weibo 2020b) Tak diskurz so pograbili tudi mediji, kjer je na primer časnik *Renmin Ribao*, pogosto v zvezi z izseljenci, omenjal krilatico »Pri izgradnji države ne sodelujejo, škodujejo pa že od daleč« (*Jianshe jiaxiang ni bu xing, qianli toudu di yi ming*).

Vsaj deloma je tak odziv spodbudila odločitev države, da morajo povratniki, ki niso vključeni v kitajski socialni sistem, sami kriti stroške nastanitve v karanteni, po poročanju okoli 70 USD na dan, po potrebi pa tudi zdravljenje (Wang, Leng 2020). Na tak način je sporočala, da so povratniki breme – tako zdravstvenemu sistemu kot tudi ugledu Kitajske, ki poskuša obvladati virus. Prav tako so jih državni organi in organizacije, odgovorni za stike z izseljenci (npr. kitajska veleposlaništva in Zveza izseljencev povratnikov), pozivali, da ostanejo v državah naselitve in se ne vračajo na Kitajsko (Zhu 2020), kar pa pogosto ni zaleglo.

Ko se je sovražni govor tako do izseljencev kot tudi drugih tujcev, predvsem na Kitajskem živečih Afričanov, zelo razbohotil, so državne institucije začele pozivati k večji toleranci (Wan 2020; Wang, Leng 2020). Glavni mediji v državi so začeli poudarjati nesprejemljivost »ksenofobije« in pozivali k bolj »racionalnemu« naslavljanju težave naraščanja uvoženih primerov covid-19. Predvsem so spomnili, da imajo te osebe kot državljani Kitajske pravico do vrnitve, da pa morajo spoštovati mukotrpan odredkanja domačih prebivalcev, ki so uspeli zajeziti širjenje virusa (*Chinadaily Online*). Tudi nekateri izseljenci in študenti so na socialnih omrežjih izrazili svoje nezadovoljstvo z obravnavo, ki so je bili deležni po povratku:

[...] Zato stojimo za pravico, da se vrnemo v svojo državo. Kot prvo, delati ali študirati v tujini ne pomeni, da se odrekaš kitajskemu državljanstvu. Morda netizeni ne razumejo, da si še vedno kitajski državljan, ne glede na to, koliko let študiraš v tujini. Naše družine in prijatelji so na Kitajskem in naš potni list je kitajski. Zaradi tega

4 Izraz temelji na delu *Država velikih otrok* avtorja Zhihong Wuja, ki v knjigi meni, da se številni Kitajci danes ne razvijajo v avtonomne osebe. Ostanejo na ravni majhnih otrok, ki zahtevajo, da vsi sledijo njihovim željam in svet razumejo zgolj v ekstremih »dobro – slabo«. V spletnem slengu se je poimenovanje »veliki otroci« uveljavilo kot sinonim za zahtevne, vase zaverovane ljudi.

imamo enake pravice in dolžnosti kot vsak Kitajec. In če se želiš vrniti, ne potrebuješ dovoljenja netizenov. (Liu xuesheng ribao 2020)

Izključevalni govor, naperjen proti mobilnim prebivalcem Kitajske, je sicer v določeni meri podoben obtoževanju notranjih migrantov za prenašanje virusa SARS leta 2003 (Xiang 2003), vendar pa je tako negativen odnos do izseljencev nov pojav. Po uveljavitvi ekonomskih in družbenih reform v sedemdesetih letih prejšnjega stoletja so namreč izseljenci aktivno sodelovali pri projektu izgradnje nove Kitajske. Nanje so gledali kot na domoljube, ki prispevajo k modernizaciji in razvoju svoje države. (Nyiri 2005) Še zlasti v zadnjem desetletju so številni izmed njih podpirali diplomatska prizadevanja Kitajske v državah priselitve, kitajska država pa jih tudi vse bolj aktivno vključuje v državne in paradržavne strukture (glej Thunø 2018). V nasprotju s prvimi desetletji po reformah, ko je izseljevanje potekalo predvsem z zelo revnega severa ali s tradicionalno izseljenskih območij na jugu in vzhodu Kitajske (npr. v provincah Guangdong, Fujian, Zhejiang), pa je izseljevanje danes vse bolj v domeni družin srednjega razreda, ki si študij ali »zlato vizo« v tujini lahko privoščijo. Geografska mobilnost tako ni vse bolj povezana s tistimi, ki si želijo doseči socialno mobilnost, temveč s tistimi, ki so jo že dosegli (prim. Liu Farrer 2016). Morda je prav v tem treba iskati vzrok za neizmeren srd do kozmopolitskih mobilnežev z diskurzom o pravicah, ki ga je pandemična turbulenca sedaj samo še bolj spodbudila in do konca razkrila.

»KITAJSKA JE IGRALA PRVI POLČAS, SVET DRUGI, KITAJSKI MIGRANTI PA IGRAMO ŽE CELOTNO IGRO⁵ – DRUŽBENO IZKLJUČEVANJE IN PARTICIPACIJA MED PANDEMIJO

Raziskave diskriminacije in izključevanja migrantov se v veliki meri osredotočajo na razmere v državah priselitve in odzive tamkajšnje družbe. Vendar pa so študije mobilnosti in transnacionalizma prepričljivo pokazale, da so migracije kompleksen proces, ki poleg življenja v novi družbi zajema še kraj in državo izvora ter transnacionalne družbene prostore. Procesi izključevanja na teh lokacijah migracijskega procesa so manj znani in raziskani, vendar ključni za razumevanje mehanizmov, ki povezujejo izključevanje z mobilnostjo. Zgodovina kitajskih migracij je neločljivo povezana tako z diskriminacijo, marginalizacijo in getoizacijo kitajskih mobilnih subjektov, in to ne zgolj v državah priselitve, temveč tudi v državi izvora (npr. preganjanje izseljencev pred in med kulturno revolucijo; glej Peterson 2012). Čeprav so ti primeri pogosto potisnjeni v preteklost, pa je pandemija covid-19 razkrila, da so tovrstni mehanizmi

5 Rek »Kitajska je igrala prvi polčas, svet drugi, kitajski migranti pa celotno igro« (*Guonei da shang banchan, guowai da xia banchang, haiwai huarenda quanchang*) se je začel pojavljati na kitajskih izseljenskih spletnih medijih aprila 2020 in se je razširil tudi na druge kitajske medije. Nanaša se tako na pomoč, ki so jo izseljenci nudili svojim izvornim skupnostnim priselitve, kot tudi na diskriminacijo, ki so je bili v različnih okoljih prav tako deležni.

še vedno bistveni del migracijske izkušnje kitajskih državljanov. Po izbruhu virusa SARS-CoV-2 so se kitajski migranti soočili z diskriminacijo in napadi v vseh družbenih prostorih, ki jim pripadajo. Če je izključevanje v državah priselitve potekalo na temelju rasizma, tj. pripisa kvazibiološke kategorije rase na podlagi vidnih značilnosti, pa je izključevanje v skupnostih drugače formirano; glede na sedaj znane podatke se zdi, da prvo središči okoli prisotnosti virusa samega, torej kužnosti, kot tudi tveganja za ugled oz. položaj migrantske skupine v družbi države naselitve, medtem ko bi lahko za izključevanje v državi izvora poudarili pripadnost družbenemu razredu v povezavi z mobilnostjo. Lahko bi tudi trdili, da je nujna sestavina za vsa tovrstna izključevanja prav zaznana in ne vedno dejanska mobilnost, saj postane med širjenjem virusa sumljiva tudi vsaka druga oblika mobilnosti.

Delo raziskovalca mobilnosti Noela Salazarja je osvetlilo pomembnost imaginarijev, tj. »historično podloženih, kulturno pogojenih in družbeno sporočenih reprezentacijskih skupkov« (Salazar 2012) pri ustvarjanju režimov mobilnosti (Glick Schiller, Salazar 2012). Ti omogočajo, reproducirajo in osmišljajo izkušnjo mobilnosti. Imaginariji o mobilnih ljudeh, bodisi migrantih, beguncih ali pa popotnikih, so tesno povezani z videnjem teh kot nosilcev obolenj tako v dobesednem kot tudi metaforičnem pomenu (Markel, Stern 2012). Takšna videnja neredko kulminirajo v predsodku o »kužnih migrantih« (Lipovec Čebtron 2010), ki jih je treba odriniti na ekonomsko in družbeno margino. Pandemična turbulenca, ki jo omenja Cresswell (2020), je še posebno ugodna za razrast tovrstnih predsodkov, saj strah pred invazijo virusov organizira družbeno življenje. Režimi mobilnosti se zato vse bolj intenzivno premikajo v smeri ukinjanja mobilnosti in prikazovanja mobilnosti kot ogrožajoče, ali pa se različne oblike mobilnosti prikazujejo kot bolj ali manj upravičene in zaželenne glede na dejavnike, kot so etnična ali »kulturna« pripadnost, posedovanje specifičnih veščin na trgu dela, spol itn. (Knežević Hočevar, Cukut Krilić 2019).

Odnos do mobilnosti med pandemijo tako kaže na kompleksno razmerje med dvojico »državljan – migrant«. Kot sledi iz novejšega prispevka Bridget Anderson (2019), je v središču razumevanja mobilnosti konflikt med ukoreninjenimi domačini in neumeščenimi tujci. Obravnava tega dihomičnega razmerja zakriva, da (meddržavna) mobilnost, tj. migracija, ni »naravni« vidik procesa razlikovanja. Zabriše namreč mehanizme, ki jih uporablja država pri kategoriziranju različnih mobilnih skupin, ter prikrije podobnosti in sorodnosti med izključevanjem znotraj državljanstva in izključevanjem na podlagi državljanstva. Kot ugotavlja Mégret (2020), lahko med pandemijo opazujemo, kako država poskuša na novo interpretirati državljanstvo tako, da na novo vzpostavlja razlike med kategorijami državljanov, kar se npr. zrcali v odnosu do dvojnih državljanov ali t. i. državljanov z manjšinsko pripadnostjo. Primer kitajskih migrantov kaže na precejšnjo kompleksnost tovrstnih reinterpretacij. Tako kitajski državljani kot naturalizirani državljani kitajskega porekla so razumljeni kot potencialni prenašalci virusa v državah priselitve, medtem pa tudi kitajski državljani povratniki na Kitajskem postanejo drugorazredni državljani in so prav tako skupaj z nedržavljanji proglašeni za potencialne »uvožene primere virusa«. Kot pravi Mégret

(2020), so diaspore tako dvojno ranljive, sama pa dodajam, da so najverjetneje kar večkratno, saj tudi članstvo v transnacionalni skupini, kot sem pokazala, ne nudi nujno zavetja pred izključevanjem.

Kljub temu odzivi skupin kitajskih migrantov kažejo na aktivno in aktivistično soočenje z nastalim položajem; od civilnih gibanj, ki naslavljajo in razkrivajo diskriminacijo, do vsakodnevnih dejanj, ki ščitijo svoje nove in stare skupnosti. V tem smislu lahko govorimo o 'državljskih dejanjih' (*acts of citizenship*) (Isin 2008), kjer aktivna, kreativna in inovativna dejanja ter prakse posameznikov in skupin s posegi v vsakdanjem življenju izzovejo obstoječi družbeni in politični red tudi s tem, da presežejo obstoječe meje držav in družbenega življenja. Ne glede na to, kako države interpretirajo in reinterpretirajo državljanstvo, je pandemija priložnost, da se tako kitajski mobilni subjekti kot tudi drugi s tovrstnimi dejanji vzpostavijo kot resnični demokratični državljani, ki želijo in zahtevajo biti slišani in lahko spodbudijo javno razpravo o temah mobilnosti in pripadanja v sodobnih družbah.

SKLEP

Preučevanje kitajskih migracij med pandemijo razkriva povezave med mobilnostjo in delovanjem mehanizmov izključevanja, rasizma, diskriminacije in stigme. Te družbene pojave lahko opazujemo na različnih lokacijah migracijskega procesa in ne le na eni (npr. državi priselitve), kar je kljub pozivom po večprizoriščni etnografiji in transnacionalni in mobilnostni analitični opni še vedno precej »običajna« metoda migracijskih študij. Kot sledi iz članka, so v samem središču različnih vrst izključevanj mobilnost in z njo kulturno, historično in družbeno pogojeni imaginariji, ki tako kitajske kot tudi druge mobilne posameznike in skupine nenehno vzpostavljajo kot drugačne in »neumeščene«, v času izrednih obdobj, kot je na primer pandemija, pa tudi ogrožajoče. Tovrstno izključevanje sicer na različnih delih migracijskega procesa prevzema različne oblike – v državah izselitve se pojavlja kot diskriminacija na temelju pripisane »rase«, med pripadniki transnacionalne skupnosti kot stigma zaradi bolezni, v izvorni državi kot diskriminacija, ki izhaja iz pripisane kozmopolitskosti in pripadnosti privilegiranemu družbenemu razredu. V vseh teh procesih pa se v pandemiji mobilnost vzpostavi kot poglobilni marker, ki tovrstne konstrukcije osmišlja v dani socialni situaciji. Posledice so za migrante tako neposredne kot posredne. Med neposrednimi opisujem številne oblike izključevanj, od fizičnega in družbenega distanciranja do različnih oblik napadov. Med posrednimi pa je treba poudariti reinterpretacijo odnosa med državljani in nedržavljan, kjer so določene (mobilne) skupine državljanov tarča enakih oblik izključevanj, ki so bile v preteklosti usmerjene proti nedržavljanom (predvsem migrantom). Oblike odpora proti tem oblikam izključevanj so zato hkrati odpor proti zoževanju mobilnosti kot družbene prakse, kot tudi nasprotovanje kategoriziranju zaželenih in manj zaželenih državljanov in soproblematičev. Obravnava kitajskih migrantov v pandemiji covid-19 razkriva, da je mobilnost,

čprav ključna lastnost sodobnosti, še vedno dojeta kot tako ali drugače ogrožajoča, takšno razumevanje pa presega nacionalne meje in dihotomijo med izvorno državo in državo priselitve in ga je, tako kot virus, le težka zaustaviti.

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SUMMARY

CHINESE MIGRANTS AND COVID-19: MOBILITY AND EXCLUSION IN THE TIME OF PANDEMIC

Martina BOFULIN

The article analyzes the practices of exclusion and discrimination against Chinese migrants in the time of the COVID-19 pandemic. Because the COVID-19 outbreak originated in the People's Republic of China, Chinese migrants have been in the center of discourses on the pandemic in all critical locations of the migration process: in the countries of settlement, the country of origin as well as in their transnational communities.

In the countries of settlement, Chinese migrants faced various forms of exclusion based on racism that have thus targeted all people whose phenotype has been deemed as "Chinese". For this reason, many Japanese, Filipinos, and Koreans became targets of discrimination as well. These acts included online bullying, distancing, and awkward behavior, the decline of visits to Chinese restaurants and shops as well as physical attacks. Some Chinese groups and communities sought to push back against this treatment by starting online and offline campaigns against racism and prejudice (e.g., *#JeNeSuisPasUnVirus*).

On the other hand, the people who contracted the virus were also targets within their transnational communities. While information on these forms of exclusion is scarce, the author recounts one such case where death by COVID-19 prompted intense pressure in the form of rumors, online commenting and bullying from the community towards the victim's family. To defend against the claims of reckless behavior, the family resorted to a public rebuttal through social media.

Lastly, the article investigates the cases of the strong exclusionary discourse against Chinese migrants who returned to China on the eve of the purported victory over the virus transmission, thus becoming the suspects of virus importation. The exclusionary discourse that ensued was led by online users, so-called netizens, who can exert a strong influence on the lives of their targets. There was a weak resistance against these attacks by migrant returnees, but eventually, the Chinese mainstream media addressed the dangerous discourse, calling for more tolerance.

By highlighting the mechanisms of exclusion towards Chinese migrants along the entire migration process as well as the resistance to exclusion, the author reveals how exclusion is part and parcel of Chinese migration, which becomes only more evident in the time of the pandemic. She argues that while the exclusions experienced at various "locations" along the migration process are differently structured, they nonetheless all rest on the mobility imaginaries that various groups hold about Chinese migrants. She also speculates that the effects of these acts of exclusion are reinterpretations of the dichotomic relationship in the conceptual pair "migrant-citizen". In contrast, the resistance against such exclusions by Chinese migrants gives hope that such "acts of citizenship" (Isin 2008) can trigger much needed public debate on the connection between exclusion and mobility.

BEG MOŽGANOV OD KONCA PETDESETIH DO ZAČETKA DEVETDESETIH LET 20. STOLETJA S POUČENJEM NA SLOVENIJI

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COBISS 1.02

IZVLEČEK

Beg možganov od konca petdesetih do začetka devetdesetih let 20. stoletja s poudarkom na Sloveniji

Namen prispevka je osvežiti spomin na čas intenzivnega (globalnega) pojava bega možganov, na njegove tematizacije v izbranih raziskavah in na položaj v Sloveniji v obdobju od konca petdesetih let do začetka devetdesetih let 20. stoletja, to je do slovenske osamosvojitve. V prvem delu prispevka avtorica teoretsko tematizira različne pojme in njihove opredelitve, v drugem delu pa prikaz samega pojava osvetli s preglednimi podatki, ki kažejo vpetost Slovenije v takratno širšo svetovno dinamiko. V zaključku poudari, da je za razumevanje pojava v vseh njegovih razsežnostih ključno razumevanje širšega konteksta.

KLJUČNE BESEDE: beg možganov, odliv veččin, migracija visokokvalificiranih in usposobljenih kadrov, migracija

ABSTRACT

Brain Drain from the End of the 1950s to the Beginning of the 1990s with an Emphasis on Slovenia

This article refreshes our memory about the time of the intensive (global) brain drain, looking at the way it is dealt with in selected studies as well as the position of Slovenia from the end of the 1950s to the beginning of the 1990s, that is, when Slovenia became independent. In the first part, the author considers the various theoretical concepts and their definitions. Then, in the second part, she illuminates the phenomenon using clear data to reveal Slovenia's integral role in the broader world currents of that time. She asserts that understanding the wider context is the key to understanding the phenomenon in all its dimensions.

KEYWORDS: brain drain, skill drain, highly skilled migration, migration

¹ Dr. sociologije, redna profesorica; Univerza v Novi Gorici, znanstvena svetnica; Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; luksic@zrc-sazu.si — Prispevek je nastal v okviru raziskovalnih projektov »Omilitve posledic bega možganov in krepitev mehanizma kroženja možganov« (V5-1928) in »Socialna, gospodarska in kulturna zgodovina slovenskega izseljenstva 1945–2015« (J5-8246) ter programske skupine »Narodna in kulturna identiteta slovenskega izseljenstva v kontekstu raziskovanja migracij« (P5-0070), ki sta jih financirala ARRS in Ministrstvo RS za izobraževanje, znanost in šport.

UVOD

V zadnjih letih se v Sloveniji vse več govori o begu možganov oziroma odhajanju najbolj izobraženega kadra, predvsem znanstvenikov, v tujino. Razprave so povezane s statistično izkazanem negativnim saldovom pri terciarno izobraženih emigrantih v letih 2012–2017. Čeprav je znanost internacionalno profesionalno področje, pa je v določenih kontekstih potreben razmislek o posledicah odhajanja, večja intenzivnost namreč lahko negativno učinkuje na domače gospodarsko in družbeno življenje. Današnje razprave potekajo na način, kot da se v preteklosti s sorodnim problemom še nismo soočali. Navidezno nov pojav je v zgodovini migracijske dinamike našega in tudi širšega prostora že znan. Predvsem v obdobju od šestdesetih do osemdesetih let 20. stoletja je zaradi položaja slovenskega (jugoslovanskega) gospodarstva v globalnih političnoekonomskih razmerjih moči prihajalo do občutnega večletnega odliva ali bega možganov v zahodnoevropske države in ZDA. Pojav je bil značilnost globalnih gospodarskih razmerij in ni zajel le našega prostora.

Namen prispevka je osvežiti spomin na čas intenzivnega (globalnega) pojava bega možganov, na njegove tematizacije v izbranih raziskavah in na položaj v Sloveniji v času od konca petdesetih let do začetka devetdesetih let 20. stoletja, to je do slovenske osamosvojitve. Dogajanje v slovenskem prostoru je (bilo) vpeto v okoliščine ukleščeni slovenskega gospodarstva in družbe v globalna razmerja družbenih, ekonomskih in političnih moči. To je pomembno vplivalo na pojav bega/odliva možganov in individualne odločitve posameznikov, ki so ali odšli ali ostali. V razpravi se v prvem delu osredotočam na sam pojem *brain drain*, ki se ga je največkrat malo ponesrečeno slovenilo v 'beg možganov'. Razprave iz izbranega obdobja navajajo številne pomembno različne izraze za izseljevanje visoko izobraženega in usposobljenega kadra, zato v prispevku teoretsko tematiziram različne pojme in njihovo jasno opredelitev. V drugem delu se osredotočam na sam pojav in ga osvetljuje s preglednimi podatki, ki kažejo vpetost Slovenije v takratno širšo svetovno dinamiko. Za resnično razumevanje vseh razsežnosti obravnavanega pojma in iskanje morebitnih alternativnih aktivnosti, ki bi imele pozitivne učinke na razmere v izvornem okolju, npr. slovenskem, je ključno razumevanje širšega konteksta. Pri tem uporabljam izbrano, pogosto citirano mednarodno literaturo in redke študije, ki so o izbranem obdobju nastale v Sloveniji. Kot je leta 1993 poudaril tudi Mali (1993: 658), so v Sloveniji proučevanja bega možganov do začetka devetdesetih let 20. stoletja oziroma do osamosvojitve Slovenije le redka.

RAZLIČNA RAZUMEVANJA POJMA *BRAIN DRAIN* OZIROMA 'BEGA MOŽGANOV', KOT SE GA JE V PRETEKLOSTI NAJPOGOSTEJE SLOVENILO

Po drugi svetovni vojni so gospodarsko najrazvitejše države zaradi potreb gospodarskega razvoja načrtno, sistemsko dvigovale stopnjo izobraženosti celotne populacije. Naraščanje potreb po strokovnjakih je spremljal tudi sistemsko načrtovan razvoj

šolstva. Vse bolj se je krepilo srednje-, višje- in visokošolsko izobraževanje ter izobraževanje oziroma usposabljanje odraslih. V gospodarsko najrazvitejših državah, npr. v ZDA, kljub temu niso mogli zadostiti celotnemu povpraševanju po strokovnjakih, zato je sledilo sistematično, aktivno mednarodno rekrutiranje visoko izobraženih in usposobljenih kadrov (*brain gain*). To je v gospodarsko manj razvitih državah ali državah v razvoju povzročilo izseljevanje specifičnega kadra (*brain drain*). (Pirher 1985: 19, 26–27) V to dinamiko je bila vključena tudi Jugoslavija in kot ena od njenih republik tudi Slovenija. Intenzivnost opisane mednarodne dinamike je sprožila zanimanje za proučevanje specifičnega migracijskega pojava, za katerega se je ustalil izraz *brain drain*, pri nas 'beg ali odliv možganov' (Šter 1974: 1074; Oommen 1989: 411–413; Ong, Cheng, Evans 1992: 543–544).

Odmevno in še danes večkrat povzeto definicijo pojma *brain drain* je postavil Adams. Pravi, da *brain drain*, ki se ga je v slovenski jezik najpogosteje prevajalo (in se ga še vedno) kot 'beg možganov' ali redkeje kot 'odtekanje možganov', semantično sugerira izgubo človeškega kapitala brez vsakršne kompenzacije. Človeški kapital odteka kot strateški ekonomski akter, ki bi lahko prispeval k domačemu razvoju in blagostanju. Iz domače, izvorne družbe oziroma države odteka v države in ekonomije sprejema, ki so globalno že tako najbolj razvite in dobro preskrbljene z visoko izobraženim (znanstvenim) in usposobljenim kadrom. (1968: 1–7) Tej definiciji se pri nas pridružujejo Klinar in nekateri drugi avtorji, ki kot pomembno dejstvo dodatno poudarjajo, da se ljudje iz gospodarsko manj razvitih držav v najrazvitejše države selijo zaradi boljših materialnih pogojev in delovnih razmer. Beg možganov je torej emigracija visoko strokovne delovne sile iz industrijsko manj razvitih držav ali držav v razvoju v razvite države. Emigracija je posledica velikih in pomembnih razlik v višini dohodka, širših možnostih za znanstveno in profesionalno usposabljanje, večjih možnostih za afirmacijo družbenega pomena znanosti in visoke profesionalizacije. Vse to posameznikom omogoča hitrejše napredovanje, dodatno izobraževanje, mednarodno projektno sodelovanje itd. Emigracija visoko izobražene in usposobljene delovne sile v najrazvitejše dele sveta je posebna oblika (globalne) eksploatacije nerazvitega sveta in sveta v razvoju s strani že tako ekonomsko najbolj razvitih držav. Že sama definicija bega (odtekanja) možganov govori o enosmernosti pretoka intelektualnih zmožnosti. (Klinar 1976: 48; Mali 1990: 18–20; Mali 1993: 656)

V tem smislu se je od šestdesetih do osemdesetih let 20. stoletja beg možganov problematiziral tudi v OZN in njenih specializiranih organizacijah. UNCTAD-ove študije so o begu možganov govorile kot o transferju nepovratnih produktivnih sredstev iz držav v razvoju v najrazvitejše države. Hkrati so opozarjale, da je »vrednost« bega možganov v šestdesetih in sedemdesetih letih že postala protiteuž in je pogosto ne le finančno izravnala, temveč tudi preseгла t. i. znanstveno-tehnološke pomoči državam v razvoju s strani gospodarsko najrazvitejših držav (Pirher 1985: 21); »tako se pogosto dogaja, da dajejo nerazvite dežele mnogo več strokovnjakov razvitim, kot pa jo te v nerazvite pošljejo v obliki tehnične pomoči« (Šter 1974: 1075). Ne preseneča, da je razumevanje termina beg možganov, kot opozarjajo nekateri,

obremenjen tudi z emotivnimi konotacijami. Pojav je vrednoten predvsem z vidika posledic, ki jih povzroči v ekonomsko nerazvitih državah in v državah v razvoju – hkrati pa so pri tem spregledane specifične profesionalne migracijske dinamike, do katerih prihaja med ekonomsko razvitimi državami. (Pirher 1985: 8–9)

V preteklosti (pa tudi danes) ni bilo poenotene definicije pojma *brain drain* oziroma 'bega/odtekanja možganov'. Različni avtorji poudarjajo, da lahko govorimo vsaj o dveh skupinah, to je o ožjih in širših opredelitvah. Ožje opredelitve kot pomembno poudarjajo smer preseljevanja oziroma enosmernost selitev iz nerazvitih držav tretjega sveta ali držav v razvoju drugega sveta v najrazvitejše države prvega sveta. Pri tem gre ali za enosmerne selitve ali za prevladovanje izselitev nad priselitvami. Ožja opredelitev izključuje kontekste, v katerih kadri prehajajo med razvitimi državami. Širše opredelitve bega možganov pa poudarjajo mednarodno preseljevanje visoko usposobljene in izobražene delovne sile v različne smeri. Govorijo o visoko usposobljenem kadru, ki odhaja ali iz nerazvitih držav t. i. tretjega sveta in držav v razvoju drugega sveta v najrazvitejše države prvega sveta, ali o kadru, ki prehaja med samimi razvitimi državami oziroma širše med državami z relativno primerljivim položajem znotraj globalnih razmerij¹ političnoekonomskih moči. (Pirher 1985: 7–8; Ong, Cheng, Evans 1992: 543–546; Castles, Miller 1998: 93, 156–157; Mali 1990: 18) Druge, širše definicije zajamejo številnejše pojave, ki jih prve izpustijo, po drugi strani pa izgubijo pomemben poudarek na razlikah v razvoju posameznih gospodarstev in globalni eksploataciji med njimi. Iz tega razloga so številni avtorji uporabljali ožji pomen pojma *brain drain*, za širši pomen pa so definirali druge, nove kategorije. Pri tem se je za mednarodne selitve visoko izobraženih in usposobljenih kadrov, ki so potekale v bolj enakovrednih mednarodnih ekonomskih relacijah in konstelacijah moči med državo izvora in državo sprejema, iskalo izraze, ki so bili najboljši pojmovno semantično/pomenski približki relacijam v praksi, ko se je ocenjevalo, da so te relacije inherentne samemu pojmu.

Tako se npr. konec sedemdesetih let poleg o begu možganov govori še o izvozu in prelivanju možganov. Z izvozom se razume primere, ko država izvora od »izseljenih možganov« dobiva v zameno stalne povratne denarne pošiljke, t. i. *remittances*, ali druge oblike povratnih pozitivnih vplivov. S prelivanjem možganov pa se govori o kontekstih, ko odide tisti del visoko izobraženih in usposobljenih, ki so doma suficitaren kader in profesionalni višek delovne sile. Zaradi nezaposljivosti njihov odhod ekonomsko razvojno ni oziroma ne more biti problematičen. V tem primeru bi lahko celo rekli, da je bilo tako z ekonomsko razvojnega vidika države in družbe kot z individualnega vidika poklicnega napredovanja in osebne kariere celo dobro, da so odšli. V konkretnem primeru Slovenije je prišlo do tega, da se je *brain drain* prevajal vsaj kot 'beg možganov' in 'odliv(anje) možganov'. Ob tem pa se srečamo še s pojmi 'poplava možganov', 'odtekanje (slovenske) pameti', 'beg pameti', 'beg človeškega kapitala', 'odliv človeškega kapitala', 'izseljevanje izobraženih kadrov', če omenim le

1 Več o tem glej v Wallerstein (1974) in Lukšič Hacin (2018b).

nekatero. Kot posebnega navajam še 'prelivanje možganov' (*brain overflow*), ki se lahko nanaša tudi na nujno mednarodno gibljivost znanstvenikov in jedrni internacionalni značaj znanosti, čeprav ga je včasih težko povsem razmejiti od bega možganov. (Pirher 1985: 8; Mali 1993: 658)

V razpravah se pogosto pojavi tudi pojem *brain gain*.² Pojem poudarjam, ker moramo biti pri njegovi rabi previdni in teoretsko korektni. Pogosto se ga uporablja kot samostojno kategorijo, podobno kot pojem *brain drain*, čeprav sta konceptualno povezana in teoretsko soodvisna ter ju je treba uporabljati skupaj. Konceptualno sta namreč povezana z Leejevo (1966) metodo analize migracijske dinamike skozi *push-pull* kriterije, pri čemer je *brain drain* na strani potisnih faktorjev, *brain gain* pa na strani faktorjev privlačnosti.³ Za *brain gain* avtorji poudarjajo, da se okoliščine zanj ne vzpostavijo same od sebe, temveč jih države sprejema skrbno načrtujejo in spodbujajo. ZDA, Kanada, Avstralija in Velika Britanija so npr. vodile aktivno, intenzivno mednarodno (selektivno) migracijsko politiko privlačnosti za znanstvenike, zdravnike, inženirje in druge visokokvalificirane kadre. Konec osemdesetih let je Velika Britanija kar 85 odstotkov vseh delovnih dovoljenj izdala strokovnjakom in menedžerjem. (Mesić 2002: 121) Cilj aktivne *brain gain* politike je mednarodna (monopolna) rekrutacija zelene delovne sile, kar po drugi strani v državah izvora, poleg drugih dejavnikov, aktivno pripomore k ustvarjanju razmer za *brain drain*. Načrtna *brain gain* politika kreira (nad)odlične delovne razmere in s tem povečuje razkorak med razmerami v državi sprejema in drugih izvornih državah. Te zaradi svoje gospodarske šibkosti ne morejo slediti ponudbam, ki se načrtovano pojavljajo v gospodarsko najrazvitejših državah sprejema.

V razpravi o pojmu *brain drain* je treba poudariti tudi sintagmo »obrnjeni transfer tehnologije« kot sinonim za beg možganov. Obrnjeni transfer tehnologije implicira dodatni vidik eksploatacije manj razvitih s strani razvitih, ko – poenostavljeno rečeno – gospodarsko nerazvite države znanje v obliki visoko usposobljene delovne sile izvažajo brez plačila, nato pa tuje znanje, v obliki tehnologije, zopet kupujejo. (Pirher 1985: 21; Mali 1990: 19) Pri razumevanju pojma *brain drain* oziroma 'beg/odliv možganov' prihaja še do ene pomembne dileme, ki jo poudarjajo avtorji, ko opozarjajo, da pomen pojma ni absoluten, objektiven in ahistoričen, ampak relativen, kontekstualen in zgodovinsko pogojen. Ne smemo ga povezovati le z visoko izobraženimi (doktorji znanosti) in usposobljenimi, ampak moramo razumeti njegovo relativnost, ko v določenih družbenih okoliščinah skupino najbolj izobraženih predstavljajo srednje- in višješolsko izobražene ter kvalificirane osebe. To je povezano ali s povprečno izobrazbeno stopnjo domačega prebivalstva ali s položajem deficitarnih poklicev ali z obema. Zato predlagata, da bi se izraz *brain drain* ali 'beg/odliv možganov' nadomestil s pojmom *skill drain* ali 'beg/odliv veščin'. (Pirher 1985: 9; Heršak 1998: 174; Lukšič 2002: 187) Konec devetdesetih let 20. stoletja na podoben

2 Pojma *brain gain* se ni slovenilo.

3 Več o modelu in teorijah glej v Lukšič Hacin 2010.

način o visoko izobraženih in usposobljenih razmišljata Castles in Miller, ko uporabita termin *highly skilled migrants*. Pojem opredelita kot nadpomenko, ki vključuje tudi pojav *brain drain*, ko se nanaša na posebno migrantsko (pod)populacijo univerzitetno izobraženih, ki se selijo iz gospodarsko manj razvite v bolj razvite države.

Castles in Miller navajata primere bolnišnic v Veliki Britaniji, kjer je veliko zdravnikov in medicinskih sester iz Afrike in Azije. Poudarjata, da je *brain drain* lahko resna izguba za gospodarsko nerazvite države, po drugi strani pa ima pojav v posameznih primerih lahko tudi pozitiven učinek: 1) v določenih situacijah, ko pride do pomembnega visokega povratnega toka denarja (*remittances*), ki razvojno pomaga gospodarstvu in družbeni dinamiki izvirnega okolja,⁴ in 2) v primerih, ko posamezniki, ki doma niso našli zaposlitve in bi bili nezaposleni, na ta način lahko zgradijo osebno kariero.⁵ Poleg pojma *brain drain* pri nadpomenki *highly skilled migrants* poudarita še številne druge dinamike in migracijske (pod)populacije, ki jih drugače poimenujeta in obravnavata. Npr. specifično (pod)populacijo *professional transients* oziroma 'profesionalnih tranzitnežev', ki se pojavi, ko multinacionalne korporacije pošiljajo svoje strokovnjake po podjetjih s sedeži v različnih državah. Gre za zelo dinamično mednarodno profesionalno mobilnost. V ta tip migracije uvrščata tudi začasno mednarodno migracijo za usposabljanje, ko nekatere gospodarsko manj razvite države načrtno in sistemsko podpirajo mednarodne migracije svojih kadrov in jo razumejo kot prednost; z vrnitvijo kadra v izvirno državo dobijo nova znanja. *Highly skilled migration* je skokovito naraščala v osemdesetih in devetdesetih letih 20. stoletja in je ključni dejavnik globalizacije. Po ocenah ILO so leta 1986 multinacionalne korporacije zaposlovale 65 milijonov delavcev, med njimi jih je bilo cca 2,2 milijona poslanih iz izvorne države v različne države sprejema. Del med njimi so bili profesionalni tranzitneži, ki so krožili med državami po mrežah multinacionalnih korporacij (Castles, Miller 1998: 91–93, 156–157; Mesić 2002: 121–122). Pri nas se je kot prevod za *professional transients* ustalil izraz 'mednarodna poklicna mobilnost'.⁶

Danes večina avtorjev poudarja, da moramo za selitev visoko izobraženih in usposobljenih kadrov uporabljati različne pojme, in to zelo natančno in v povezavi s kontekstualnimi značilnostmi pojavov. Tako se pojem *brain drain* nanaša na situacije, v katerih v izvorni državi prihaja do izrazito značilne izgube visoko izobraženega in usposobljenega kadra, temu pa sledijo pomembne (negativne) posledice za domače gospodarstvo in celotno družbo. V analizah, ki ugotavljajo, ali gre v konkretnem primeru res za *brain drain*, je treba poleg potencialnih izgub zaradi odhoda upoštevati tudi morebitne pridobitve; te se kot vračilo pojavljajo s posrednim ali neposrednim

4 V pomenu pojma 'izvoz možganov'.

5 V pomenu pojma 'prelivanje možganov'.

6 Če izhajamo iz dejstva, da diskurz pomembno konstituira družbeno realnost, ima ta pristop tudi pomanjkljivosti. Kot posledica različnih poimenovanj za različne skupine migrantov se lahko ustvari razumevanje, da te skupine nimajo ničesar več skupnega. Skrajne posledice se lahko pojavijo v njihovih različnih političnih obravnavah in pravnopolitičnih statusih, ki so jim dodeljeni v državah sprejema. Več o tem v Lukšič Hacin 2018b.

sodelovanjem tega kadra z izvorno državo z namenom stimuliranja rasti in razvoja domače ekonomije. (Lowell 2003: 1) Hkrati moramo upoštevati, da je opredelitev pojma *brain drain* povezana s pojmom *brain gain*. Oba pojma sta medsebojno povezana z diadno logiko modela *push-pull*, v katerem sta bila razvita za analizo specifične populacije visoko izobraženih in usposobljenih migrantov. V nadaljevanju Lowell za drugačne (globalne političnoekonomske) kontekste definira druge kategorije: *high skilled mobility* – gibanje visoko usposobljenih oseb, običajno višje- in visoko, včasih tudi srednješolsko izobraženih; *brain waste* – nezaposlenost visoko izobraženega in usposobljenega kadra v državi sprejema ali državi izvora; *brain circulation* – 'kroženje možganov', začasni odhod kadra v tujino in pozneje njegovo vračanje v izvorno državo; *brain exchange* – odhod visokokvalificiranega in usposobljenega kadra v tujino, ki je nadomeščen s priselitvijo primerljivega kadra iz drugih držav; *brain globalization* – globalna profesionalna mobilnost visoko izobraženega in usposobljenega kadra znotraj globalne ekonomije in multinacionalnih korporacij; *brain export* – aktivna politika izvorne države, ki načrtno izobražuje kader z namenom zaposlitve v tujini in ekonomskega povračila, npr. v obliki *remittances*. (2003: 2)

Po drugi svetovni vojni se je do devetdesetih let 20. stoletja pri nas v sicer maloštevilnih raziskavah pojavljal pojem *brain drain*, slovenjen predvsem kot 'beg možganov'. Ker se pričujoča razprava nanaša na to obdobje, v nadaljevanju pojem 'beg možganov' – čeprav so ga različni avtorji različno opredeljevali in razumeli – uporabljam v njegovem ožjem pomenu. Bolj pomembno pa je dejstvo, da je bil sam kontekst, v katerega je bilo vpeto slovensko gospodarstvo tako v Jugoslaviji kot v globalnih političnoekonomskih odnosih in razmerjih sil, zelo blizu razmeram, v katerih se je odvijal »klasični« odliv/beg možganov, vendar brez opaznih in pomembnih dolgoročnih pozitivnih povratnih učinkov na izvorno okolje. Iz tega razloga v nadaljevanju na kratko orišem svetovne razmere in vanje pregledno umeščam jugoslovansko in znotraj tega slovensko gospodarsko-migracijsko situacijo, ki je krojila objektivne okoliščine za individualne odločitve izobraženih in visoko usposobljenih posameznikov za odhod v tujino.

ZGODOVINSKA TEMATIZACIJA POJAVA *BRAIN DRAIN* OZIROMA 'BEGA MOŽGANOV'

Takoj po drugi svetovni vojni in v začetku petdesetih let 20. stoletja pojav bega možganov globalno še ni bil tako intenziven. Razlog za to tiči tudi v rasističnih (i)migrantskih politikah gospodarsko najbolj razvitih držav, ki so onemogočale priseljevanje ljudi iz rasno in etnično nezaželenih skupnosti. Tako je npr. v Avstraliji do leta 1958 veljala politika *whites only*. Podoben kvotni sistem je veljal v Kanadi in ZDA. Do prvih sprememb je v Avstraliji prišlo leta 1958 (dodatno leta 1966), v ZDA leta 1965, v Kanadi leta 1967 in v Veliki Britaniji leta 1962 (dodatno leta 1965). V omenjenih letih se je kvotni sistem na rasni in etnični osnovi končal, v imigrantskih politikah omenjenih

držav pa je še naprej ostal prikrit kvotni sistem, ki je temeljil na izobraženosti prišlekov – prednost so imeli predvsem visoko izobraženi in usposobljeni imigranti ali imigranti s poklici, ki so bili deficitarni v državi sprejema. (Oommen 1989: 411–412) Migracija visoko izobraženega in usposobljenega kadra iz gospodarsko manj razvitih držav v najrazvitejšo je dobila širši razmah v šestdesetih letih 20. stoletja. Po statističnih podatkih je največje število kadra odšlo v ZDA. Med letoma 1947 in 1965 se je v ZDA priselilo 2,2 milijona ljudi, od tega 16,9 odstotka visoko strokovno usposobljenih. Leta 1965 je bilo med 130.811 priseljenci v ZDA kar 22 odstotkov visoko strokovno usposobljenih. (*Sociološki leksikon* 1982: 24). Število je z leti skokovito naraščalo, leta 1947 se je npr. priselilo 2.382, leta 1970 pa že 16.492 strokovnjakov – od 700.000 raziskovalcev v tem letu je bilo 15 odstotkov priseljenih (Šter 1974: 1074). V celotni imigraciji v ZDA med letoma 1961 in 1965 je bilo prišlekov iz nerazvitih držav 37 odstotkov, do srede sedemdesetih let pa se je delež dvignil na 70 do 80 odstotkov. Med njimi samimi, v populaciji priseljencev, se je hkrati delež strokovnjakov povečal za več kot 200 odstotkov. (Pirher 1985: 8) Do leta 1961 so ZDA v kemijskih in fizikalnih znanostih dobile 40 Nobelovih nagrad, od tega je bilo 37 odstotkov nagrajencev rojenih zunaj ZDA (Šter 1974: 1074). Še leta 1964 je bilo 51,8 odstotka strokovne imigracije v ZDA po poreklu iz Evrope. Pozneje je vse bolj naraščal delež iz neevropskih delov sveta, ki je v letih 1971 in 1972 predstavljal tretjino letnega povečanja strokovnega osebja v ZDA (Pirher 1985: 28, 42).

Intenzivnost mednarodne e/imigracije visoko izobraženega in usposobljenega kadra je od konca petdesetih do srede sedemdesetih let skokovito naraščala. Višek priseljevanja je bil po različnih državah sprejema različen. Kar 75 odstotkov bega možganov iz vseh držav izvora po svetu je bil usmerjen v štiri države sprejema: Avstralijo, Kanado, Veliko Britanijo in ZDA (Pirher 1985: 25; Oommen 1989: 411–412; Ong, Cheng, Evans 1992: 543–544). Med njimi edino ZDA niso poznale izseljevanja tovrstnega kadra, druge tri države pa so bile hkrati države sprejema in države izvora, slednje sicer v majhnem deležu, in to za tiste kadre, ki so odšli v tujino, največkrat v ZDA (Pirher 1985: 28).

Za zgled bi lahko vzeli beg možganov iz Velike Britanije. Britanija je znanstveno in tehnološko visoko razvita država. Kljub temu je bila v šestdesetih letih zanjo značilna visoka stopnja znanstvene emigracije (zlasti v ZDA), in to celo med hitrim naraščanjem izdatkov za raziskovanje in razvoj. [...] Vse to je bila posledica dejstva, da je bila takrat deležna močne podpore predstava o potrebnosti znanstvenega izpopolnjevanja v tujini za kasnejšo uspešno znanstveno kariero doma. (Mali 1993: 658)

V preteklosti so strokovnjaki v manj razvite države prihajali tudi iz gospodarsko najbolj razvitih držav, vendar statistike za ta obdobja kažejo, da so nerazvite države dajale mnogo več strokovnjakov razvitim, kot pa so jih ti kot »tehnično pomoč« pošiljali v nerazvite države (Šter 1974: 1075).

T. i. migracija možganov z juga proti severu in med gospodarsko razvitimi državami je do srede sedemdesetih let 20. stoletja dosegla izreden obseg in po razpoložljivih podatkih zajela okrog 900.000 oseb. ZDA so se v konkurenčnem boju za kadre s Kanado in z Veliko Britanijo izkazale za nepremagljivo zmagovalko. (Pirher 1985: 34, 66). Preostale države Zahodne Evrope v pojav bega možganov niso bile tako močno vključene kot ZDA, Kanada in Velika Britanija. Kljub temu pa je prihajalo do bega možganov, in to v isti smeri kot migracije začasnih/tujih delavcev, z juga proti severu oziroma iz južnoevropskih držav: iz Grčije, Portugalske, Italije, Španije, Turčije in Jugoslavije. Najpogostejša ciljna država je bila ZR Nemčija. Po uradnih podatkih je ZR Nemčija do leta 1971 dovolila naselitev 19.330 strokovnjakov, kar je bilo občutno več kot v drugih evropskih državah, ko je Švica dovolila naselitev 2.219, Avstrija 1.958, Belgija 155 in Francija 3.270 strokovnjakov. (Pirher 1985: 31)

Po naftni krizi⁷ (1973) so evropske države omejevale priseljevanje, in to ne le takoj po krizi, omejevanje se je nadaljevalo v osemdeseta in devetdeseta leta. Za pozitivno selekcionirane migrante, ki niso bili prisiljeni v vrnitev v izvirne države, je sledilo obdobje integracijske politike in v sklopu integracijskih strategij obdobje dovoljenega priseljevanja v okviru t. i. politike združevanja družin. Pirher dokazuje, da je po naftni krizi hkrati prišlo tudi do omejevanja bega možganov, tako da se je v Evropi ustvaril občutek, da je ta preteklost (1985: 25, 35), vendar ne povsem, saj se je nadaljevalo dovoljeno selektivno in kontrolirano (kvotno) priseljevanje strokovnjakov z deficitarnih območij, če omenimo le vrhunske znanstvenike in specialiste, računalniške in medicinske strokovnjake. Poleg selektivno reguliranega rekrutiranja se je pri pridobivanju »tujih možganov« pojavil nov pristop. Pirher navaja, da se je kapital selil v izvirne, gospodarsko manj razvite države, in sicer s kupovanjem tehnološko, znanstveno, razvojno zanimivih organizacij. Te so v izvorni državi prešle v last tujega kapitala, ki je pri tem uporabljal znanje izvirne države. Z relokacijo se je monopolni kapital približal ceneni delovni sili. Po avtorjevem mnenju bi to lahko imenovali prikriti beg možganov. (1985: 36–39) Iz tega sistema omejevanja in kontroliranega rekrutiranja je bilo izključeno kroženje možganov med državami članicami EGS, ki so v skupnosti že sprejele dogovor o prostem pretoku kapitala, blaga, dela in storitev.

Kje je bilo mesto Jugoslavije oziroma Slovenije v tej globalni dinamiki? V šestdesetih in sedemdesetih letih 20. stoletja, v času intenzivnega izseljevanja iz Jugoslavije na t. i. začasno delo v tujino, ki ga je z aktivno politiko in bilateralnimi pogodbami

7 V drugi polovici sedemdesetih let so se pojavile nove ciljne države, države članice OPEC-a (naftne dežele na Srednjem vzhodu, v Iranu, Iraku, Venezueli, Nigeriji idr.), ki so pridobile strokovnjake s celega sveta. Sredi sedemdesetih let so začele z intenzivnimi naložbami v gospodarsko infra- in suprastrukturo, kar je porodilo velike potrebe po visoko usposobljenih kadrih. Doma jih ni bilo dovolj, zato so jih začele iskati globalno. Konec leta 1980 je bilo v osmih najpomembnejših državah skupno zaposlenih že 2,7 milijona tujih delavcev. Samo v Libiji je leta 1977 delalo 500.000 tujcev. V začetku zelo liberalna priseljska politika se je tudi tu v osemdesetih letih spremenila v popolno regulacijo. Uvedli so sistem rotacije, t. i. *project-tied migrants (workers)*, ko so najeta tuja izvajalska podjetja s seboj pripeljala delavce (Pirher 1985: 32). To so bili detaširani oziroma napoteni delavci, kot jih v okviru prostega pretoka kapitala, blaga, dela in storitev znotraj EU imenujemo danes. (Lukšič Hacin 2018a)

spodbujala tudi država, se je iz Jugoslavije izselilo največ zdravnikov, stomatologov, inženirjev in tehnologov različnih strok, fizikov, matematikov, medicinskih tehnikov pa tudi družboslovcev. Največ jih je odšlo v države Zahodne Evrope, nekaj pa tudi v ZDA, kamor se je med letoma 1963 in 1973 odselilo okoli 1.370 strokovnjakov. (Pirher 1985: 43) Popis prebivalstva leta 1971 je pokazal, da je bilo na začasnem delu v tujini 7.000 Jugoslovanov z visokošolsko izobrazbo (Šter 1974: 1075). Isto leto se je v raziskavi ugotovilo, da je bila kvalifikacijska struktura jugoslovanskih delavcev na začasnem delu v tujini ugodnejša kot med zaposlenimi doma. Leta 1972 je bilo v tujini 150.000 delavcev s končano šolo, med njimi 30.000 z višjo ali visoko izobrazbo. Iz popisa prebivalstva 1981 vidimo, da je bilo na začasnem delu v tujini okrog 157.000 Jugoslovanov s srednjo, višjo in visoko izobrazbo (Pirher 1985: 43), kar pomeni, da je v desetih letih število naraslo le še za 7.000 oseb, razlog za to pa je povezan z zgoraj opisanimi posledicami naftne krize, ki je povzročila, da gospodarsko najrazvitejše države sprejema niso več dovoljevale priseljevanja oziroma so ga dovoljevale izjemoma in selektivno.

Iz Slovenije so strokovnjaki odhajali že v petdesetih in šestdesetih letih, le da v tem času še ni bilo selitvene statistike oziroma pozneje podatki niso bili obdelani na način, da bi bili uporabni za analizo bega možganov. Izjemi sta bili leti 1960 in 1965, ko iz podatkov lahko razberemo, da je bilo v odhajajoči populaciji od dva do tri odstotke visoko izobraženih oseb. (Šter 1974: 1075) Primerjalno s stanjem po drugih jugoslovanskih republikah lahko vidimo, da je največ strokovnjakov odšlo iz Slovenije. Leta 1972 je bilo v tujini 1.200 strokovnjakov iz Slovenije, od tega vsaj 64 doktorjev znanosti. (Pirher 1985: 43) Po oceni iz leta 1970 je bilo takrat v tujini 1.500 akademsko izobraženih, okrog 1.000 z višješolsko izobrazbo in preko 2.000 srednješolsko izobraženih. Pri tem niso upoštevani tisti, ki so izobrazbo pridobili v tujini. (Stare 1977: 41) Po popisu prebivalstva 1971 naj bi bilo 2,9 odstotka prebivalcev Slovenije na začasnem delu v tujini. Strokovnjaki, umetniki in vodilno osebje so predstavljali štiri odstotke vseh v tujini začasno zaposlenih. V strukturi prebivalstva Slovenije je bil po popisu leta 1971 delež z višjo in visoko izobrazbo⁸ 5,7-odstoten, v strukturi zdomcev pa 1,9-odstoten. Zaradi nepopolnih podatkov se ocenjuje, da je bilo takrat v populaciji, ki je bila v tujini, dva do tri odstotke visoko izobraženih in usposobljenih strokovnjakov. Zanimivo je, da je bila večina med njimi pred odhodom zaposlena v kulturi in sociali (187), manj pa v industriji in rudarstvu (111). Težava analize za ta čas so bili nepopolni podatki. Ocene so se zelo razlikovale, od tega, da je v tujini le 500 do 1.000 Slovencev z visoko izobrazbo, do druge skrajnosti, da je v tujini več tisoč slovenskih inženirjev in znanstvenikov. (Šter 1974: 1075–1076)

Iz pregledanih podatkov letnih poročil za obdobje 1965–1975, ki so bili dostopni na Republiškem zavodu za zaposlovanje, ki, kot vemo, niso popolni, saj je velik del

8 Po planu 1971–1974 naj bi bilo ob njegovem izteku v SR Sloveniji med zaposlenimi le še 53 odstotkov delavcev brez strokovne usposobljenosti. To ni bilo doseženo (bilo jih je 58,5 odstotka), saj so v gospodarstvu povpraševali po NKV delovni sili, kar je bilo povezano s stopnjo modernizacije gospodarstva, ki je očitno zaostajala za plani (Stare 1977: 98–100).

Ljudi odhajal v tujino neregistrirano, se vidi, da so v tem času glede na izobrazbo zabeleženi naslednji odhodi: z visoko šolo 698 (ali 1,2 odstotka od vseh, ki so odšli), 825 z višjo šolo (ali 1,5 odstotka od vseh, ki so odšli) in 942 s srednjo šolo (ali 1,7 odstotka vseh, ki so odšli). Skupaj z višjo in visoko šolo jih je bilo 1.523 (2,7 odstotka). Drugi, ki so odšli, so bili nepriučeni, priučeni ali s poklicno šolo. Med delavci z višjo in visoko izobrazbo so prevladovali gradbinci, zdravniki in projektanti. Njihov odhod je bil posledica občutnega zmanjšanja domačega povpraševanja po gradbenih storitvah. Gradbeni sektor je znake oživljanja začel kazati šele po letu 1971. (Stare 1977: 42, 57, 61)

Iz popisa prebivalstva 1981 razberemo, da je bilo na začasnem delu v tujini okrog 157.000 Jugoslovanov s srednjo, z višjo in visoko izobrazbo. Med njimi jih je bilo 3.246 iz Slovenije; imeli so najmanj fakultetno diplomu. (Pirher 1985: 43) Po statističnih podatkih se je v osemdesetih letih iz Republike Slovenije izselilo skupaj 46.648 oseb, letno povprečno 5.183. Večina med njimi se je razselila v druge jugoslovanske republike, največ v Hrvaško (34,32 odstotka) ter Bosno in Hercegovino (31,66 odstotka), 24,22 odstotka po preostalih republikah. Drugih 9,8 odstotka jih je odšlo v tujino, največ v Nemčijo (1,85 odstotka, kar je 863 oseb) in Avstrijo (1,13 odstotka, kar je 527 oseb) (Bevc, Zupančič, Lukšič 2004: 46). Bevc ocenjuje, da je v obdobju 1981–1991 na delo v tujino odšlo okrog 2.700 stalnih prebivalcev Slovenije z višjo ali visoko izobrazbo. Po ocenah naj bi bila med vsemi stalnimi prebivalci Slovenije, ki so odšli na delo v tujino v obdobju 1981–1991, ena tretjina z višjo ali visoko izobrazbo. Med vsemi osebami, ki so bile na začasnem delu v tujini, je bilo 33 odstotkov bega možganov (Bevc 1993: 693–694).

Na podlagi popisa prebivalstva leta 1991 je bilo iz Slovenije v tujini »začasno« 2,7 odstotka stalnih prebivalcev. V primerjavi z letom 1981 je prišlo do rahlega zmanjšanja, se je pa med njimi zvišala stopnja izobrazbe, in to bolj, kot je narasla povprečna izobrazbena stopnja domačega prebivalstva. V povprečju so bili najbolj izobraženi v Veliki Britaniji, najmanj pa v Nemčiji in Avstriji. Delež visoko izobraženih v populaciji na začasnem delu v tujini se je z 2,5 odstotka povečal na tri odstotke (Bevc 1995: 96, 98).

Kaj sta bila vzrok in motiv bega možganov? Slednje se je, ne le pri nas, ampak tudi po svetu, raziskovalo na različne načine. V različnih, a sorodnih pristopih so prišli do dopolnjujočih se ugotovitev. Medtem ko so nekateri avtorji ostali zgolj na ravni posameznikovih odločitev, so drugi upoštevali vpetost *brain draina* oziroma 'bega možganov' v globalne razsežnosti odnosov med gospodarsko manj razvitimi državami, državami v razvoju in najrazvitejšimi državami. V nadaljevanju so odločitve posameznikov kontekstualizirali v zanje objektivne okoliščine, ki so jih določali (globalni) statusi njihovih izvornih držav. Slednje pomembno vpliva na možnosti, ki se odpirajo v življenju posameznika, saj so te odvisne od okoliščin in možnosti, ki jih ponujata konkretna družba in država s svojim gospodarstvom.

Že konec šestdesetih let Adams beg možganov pojasnjuje z uporabo *push-pull* modela in diado *brain drain-brain gain*. Kot glavne motive in razloge za pojav bega

možganov poudari razlike v višini osebnih dohodkov; profesionalne možnosti za poklicno napredovanje; pomanjkanje pripravljenosti za spremembe in inovacije v izvornih državah, kar se pogosto povezuje z birokratizmom in s togo hierarhično strukturo organizacije dela; razvrednoten družbeni položaj znanosti v družbi in državi, kjer je znanost marginalna in ni cenjena; nezaposlenost intelektualcev; izobraževanje v tujini, ki daje študentom za izvorno državo nerelevantno znanje in tako postanejo doma nezaposljivi, če omenim le nekatere. (Adams 1968: 6–8) Šter vzroke in motive bega možganov deli v štiri skupine dejavnikov: razlike v dohodkih med državami; razlika v dohodkih strokovnjakov v odnosu do drugih zaposlenih; razlike v družbeni obravnavi strokovnjakov; druge razlike. Razlike v dohodkih so kompleksne, za vrhunske strokovnjake so zelo pomembne tudi profesionalne možnosti za delo (raziskovalna oprema, dostop do strokovne literature, možnosti mednarodnega timskega dela, korektni odnosi na delovnem mestu), včasih celo bolj kot sam dohodek. Pomembne so tudi življenjske razmere, od možnosti reševanja eksistenčnih problemov do političnih svoboščin. Za Slovenijo se temu dodaja še razloge socialno-psihološke narave, saj se kot najpomembnejši pokažejo odnosi in konflikti v kolektivu. Če se strne očno o vzrokih za odtekanje slovenskih možganov v šestdesetih in sedemdesetih, so najpomembnejši vzroki organizacijske slabosti. Sledijo medčloveški odnosi oziroma konflikti v delovnih organizacijah (nemožnost poklicnega napredovanja, konflikti v kolektivu, v tujini so važne sposobnosti in ne formalnosti, v tujini je večja možnost strokovnega izpopolnjevanja itn.). V tretji skupini so materialni vzroki, torej boljši absolutni in relativni osebni dohodek. Na koncu so še drugi vzroki, kot so npr. brezposelnost, poroke in stanovanjsko vprašanje (Šter 1974: 1082–1086; Pirher 1985: 49–51).

Ko je govora o možnih aktivnejših politikah za preusmeritve negativnih procesov bega možganov v Sloveniji, se je treba najprej zavedati, da so bili vzrok za naš beg možganov v bolj ali manj oddaljeni preteklosti vsi klasični dejavniki, ki jih sodobne migracijske teorije označujejo kot *pull* in *push* faktorje. (Mali 1993: 657)

To pritrjuje tudi raziskava iz leta 2004, ko se je v intervjujih izkazalo, da so bili za 37 sogovornikov glavni motivi za začasni ali trajni odhod naslednji: možnosti za napredovanje v tedanji poklicni dejavnosti, možnosti za razvoj kariere, možnosti za (mednarodno) projektno delo, možnosti (do)izobraževanja in dodatnega usposabljanja, boljši zaslužek, boljše možnosti za delo in strokovni razvoj. (Bevc, Zupančič, Lukšič 2004: 155)

Kljub nekaterim razlikam med avtorji so v analizi vzrokov in motivov pa tudi migracijske dinamike relativno primerljivi in prihajajo do podobnih rezultatov. V nadaljevanju pa med njimi prihaja do razlik, nekateri raziskovalci na tej stopnji analizo končajo, drugi pa razmislek o razlogih za beg možganov in prihodnjih strategijah zanj kontekstualizirajo v globalne relacije političnoekonomske moči in upoštevajo pozicijo konkretne proučevane države. Če pojma *brain drain* oziroma 'beg možganov' ne razumemo le kot odhod posameznega visoko usposobljenega strokovnjaka

v tujino, ampak tudi kot dogodek skupnosti, s katerim gospodarsko nerazvita država izvora zaradi selitve izgubi njegov potencial. V razmislek moramo kot posledico bega možganov dodati še razmerja asimetrične globalne razvitosti, ko se izkaže, da beg možganov le še povečuje obstoječo asimetrijo, ki se na koncu izkaže tudi v delitvi na revni in bogati svet. Na tem mestu pa je nujno treba spregovoriti o zgodovinsko nastalih predpostavkah, pogojih, kontekstih znotraj globalnih politično-ekonomsko konstruiranih razmerjih moči, odnosov, statusov in pozicij posameznih držav izvora in sprejema. (Lukšič Hacin 2018b) V tem pristopu se lahko skriva tudi odgovor na vprašanje, kaj se Slovenija lahko o begu možganov iz preteklosti nauči za svojo prihodnost.

Zgleda, da Slovenija v sodobnosti ne more preprečiti bega možganov in zato ji ne preostane drugega, kot da kombinira dva modela reševanja tega velikega problema. Iz kozmopolitskega modela kaže prevzemati takšne razmere, uveljavljene v razvitem svetu, ki zagotavljajo možnosti uspešnega delovanja strokovnjakov v domačem izvornem okolju, hkrati pa razvijati različne oblike sodelovanja s strokovnjaki slovenskega rodu po svetu. Težnje po razvijanju profesionalnih razmer, ki omogočajo delovanje strokovnjakov v domačem okolju, pa istočasno pomenijo uveljavljanje nacionalnega modela, ki zadeva beg možganov. (Klinar 1989: 1064)

ZAKLJUČEK

Za selitveno dinamiko visoko izobraženih in usposobljenih ljudi se uporabljajo različni pojmi, ki se nanašajo na podobne, a pomembno različne selitvene prakse. Na individualni ravni so si analize o posameznikovih razlogih in motivih zelo podobne, razlike med njimi pa se pokažejo, ko/če analizo nadaljujemo na drugih ravneh, vse do vprašanja o globalnih relacijah med državami izvora in sprejema ter prihodnjih razvojnih učinkih za obe strani. V različnih praksah je ena od možnosti *brain drain* ali 'beg/odtekanje možganov', pojem, ki je definiran kot pojav izgube človeškega kapitala brez vsakršne kompenzacije za gospodarsko manj razvito državo izvora. Človeški kapital odteka kot strateški ekonomski akter, ki bi lahko prispeval k domačemu razvoju in blagostanju. Iz domače, izvorne države odteka v države in ekonomije sprejema, ki so globalno že tako najrazvitejše in dobro preskrbljene z visoko izobraženim (znanstvenim) in usposobljenim kadrom, s čimer se v izvornih državah izgublja tudi inovacijski potencial. Govorimo o organizirani in selekcionirani migraciji, pri kateri so poglobitveni regulacijski mehanizmi v domeni držav sprejema (*brain gain*), zaradi asimetričnih globalnih političnoekonomskih razmerij moči pa države izvora nanje lahko le delno (ali sploh ne) vplivajo. S tem se povečujejo že tako velike razlike med gospodarsko razvitostjo, povzročajo izgube večletnih investicij izobraževanja kadra, izgublja se razvojni potencial izobraženih kadrov, ker se ta z njihovim odhodom brezplačno seli v razvitejša gospodarstva.

Za slovenski prostor v času SFR Jugoslavije lahko rečemo, da je bilo odhajanje visoko izobraženih in usposobljenih ljudi v tujino tipičen primer bega možganov tako zaradi jugoslovanskega gospodarskega (polperifernega) položaja v globalnih razmerjih moči kot tudi zaradi dejstva, da se večina tistih, ki so odšli, ni vrnila. Med bivanjem v tujini tudi niso sodelovali s slovenskim okoljem na način, da bi mu vračali vanje »vloženi kapital« – kapital se ni vračal v izvorni prostor. Razlogi nesodelovanja so lahko na obeh straneh: na strani tistih, ki so odšli, ali na strani okolja izvora, ki sodelovanja ni omogočalo. Šter navaja, da skoraj polovica Slovencev, ki je delala v tujini, ni imela nikakršnih strokovnih stikov niti z organizacijami niti s posamezniki v Sloveniji. Nekateri med njimi so se strokovno povezovali le s posamezniki. Le majhen del se je z dolgoročnejšim profesionalnim ali projektnim sodelovanjem povezoval z organizacijami ali s posameznimi strokovnjaki. Po drugi strani je bila večina pripravljena na sodelovanje (92,3 odstotka), le zelo majhen delež na sodelovanje ni bil pripravljen (7,7 odstotka), ena šestina med njimi zaradi konkurenčne klavzule v delovni pogodbi. Razlogi za opisano stanje so bili različni, naj omenim le neorganiziranost in nezainteresiranost na »slovenski strani«. (Šter 1974: 1087–1088) S tem je poudarjena odgovornost slovenske politike (in države), ki ni aktivno vzpostavljala možnosti za mednarodno sodelovanje s tistimi, ki so odšli, na način, da bi se s svojim potencialom lahko aktivno vključili v naše okolje.

Mali omenja, da je v obravnavanem času nekaj predlogov izhajalo iz dejstva, da stanje razvitemu svetu ustreza in da bo do sprememb prišlo le, če se bodo za to zavzele države izvora. Upoštevali so, da se v razvitih zahodnih družbah še dolgo ne bodo branili dotoka visoko usposobljenih strokovnjakov, vrhunskih znanstvenikov in podjetnikov s kapitalom. Možnosti za globalno mednarodno migracijsko politiko so bile (in so še) šibke zaradi statusno globalne pozicije nemoči držav izvora. Prav tako so (bila) nerealistična pričakovanja po spontani reemigraciji strokovnjakov. Iz vsega sledi, da je edina možnost držav izvora aktivna politika povezovanja in vključevanja v tujini profesionalno delujočih znanstvenikov in strokovnjakov v reševanje domačih razvojnih vprašanj. Slovenija je v začetku devetdesetih let zanimivo idejo o tretji slovenski univerzi razvijala v povezavi z idejo o skupnem slovenskem kulturnem prostoru, izdelan je bil kompleksen program, ki so ga podpirali številni slovenski znanstveniki doma in v tujini (Klinar 1989; Mali 1990, 1993; Mali, Sorčan 1990), a žal ni bil uspešno implementiran. Za prihodnjo raziskavo se tako odpira vprašanje, kaj se je zgodilo, da projekt ni bil uspešno realiziral oziroma, še huje, da je postopno utonil v pozabo.

To je toliko pomembneje, ker je program ena od redkih realnih možnosti, ki jih ima Slovenija za spopad s posledicami bega možganov. Danes ima Slovenija, čeprav je članica Evropske unije, polperiferni gospodarski položaj in je zato izpostavljena aktivni *brain gain* rekrutacijski politiki, ki jo za visoko izobraženo in usposobljeno delovno silo izvajajo gospodarsko razvitejše države članice EU in predvsem ZDA. V odličnih razmerah za ponovitev bega možganov je največ, kar lahko naredimo, vzpostavitve aktivne politike povezovanja in vključevanja slovenskih, v tujini profesionalno

delujočih znanstvenikov in strokovnjakov v reševanje razvojnih domačih vprašanj.⁹ Druga, še pomembnejša možnost za spremembo je povezana s finančno podhranjenim, z družbeno razvrednotenim in s politično marginaliziranim položajem znanosti v Sloveniji. Tu so škarje in platno povsem v rokah vsakokratne slovenske vlade, globalna razmerja moči nikakor ne morejo biti izgovor za neodgovorna odločanja o položaju znanosti, katerih negativne posledice za slovensko državo se bodo pokazale šele v prihodnosti. In če ne bo nič drugače, bodo visoko izobraženi in usposobljeni ljudje ponovno odhajali.

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SUMMARY

BRAIN DRAIN FROM THE END OF THE 1950S TO THE BEGINNING OF THE 1990S WITH AN EMPHASIS ON SLOVENIA

Marina LUKŠIČ HACIN

In recent years in Slovenia, there is ever more talk of brain drain, that is, the departure of the most highly educated workforce, especially scientists, to countries abroad. Although science is an international professional field, in certain contexts, it demands deliberation about the consequences of such departures, since a greater intensity of them can negatively affect the national economy and social life. Today's discussions take place as if similar problems have not existed in the past. Seemingly new, this phenomenon is already known in the history of the migration dynamics of Slovenia and elsewhere, especially from the 1960s to the 1980s. At that time, in light of the position that the Slovenian (Yugoslav) economy held in the global political-economic power relations, there was a considerable multi-year outflow of professionals or brain drain especially to the countries of Western Europe and the USA. The phenomenon not only affected the Slovenian space but was characteristic of global economic relations.

The article aims to refresh our memory about the time of the intensive (global) brain drain, by looking at the way it is dealt with in selected studies as well as the position of Slovenia from the end of the 1950s to the beginning of the 1990s, that is, until the time of Slovenian independence. The situation in the Slovenian space is (and was) integrated into the circumstances of the stranglehold of the Slovenian economy and society in the global relations of the social, economic and political powers. It not only significantly influenced the brain drain phenomenon in Slovenia, but also the individual decisions of persons who left or stayed.

In the first part of the article, the author focuses on the concept of brain drain, which in Slovenian language translates as "*beg ali odtekanje možganov*". The discussions from the selected time use a considerable number of different expressions for the migration of highly trained and educated professionals. The article considers the various concepts and their definitions from a theoretical perspective. Then, in the second part, the author focuses on the phenomenon itself and illuminates it using clear data which reveal Slovenia's integral role in the broader world currents of that time. The author emphasizes that for a true understanding of all the dimensions of the treated phenomenon and the search for possible alternative activities which would positively affect on the relations in the original – that is, Slovenian – environment, an understanding of the wider context is key.

»NE SRBI NE SLOVENCİ, NE KATOLIČANI IN NE PRAVOSLAVCI, PA TUDI NE ITALIJANSKI IN NAŠI DRŽAVLJANI«: SLOVENSKO ČASOPISJE O SLOVENSKI KOLONIJI V BISTRENICI V LETIH 1930–1940

Jernej MLEKUŽ¹

COBISS 1.02

IZVLEČEK

»Ne Srbi ne Slovenci, ne katoličani in ne pravoslavci, pa tudi ne italijanski in naši državljani«: Slovensko časopisje o slovenski koloniji v Bistrenici v letih 1930–1940
Avtor v besedilu odgovarja na vprašanje, kako je o slovenski koloniji v makedonski Bistrenici pisalo slovensko časopisje v letih 1930–1940, v času, ko je bilo narodno vprašanje eno osrednjih vprašanj slovenske politike in kulture, kar se je odražalo tudi v pisanju ideološko polariziranega časopisja. Liberalnemu taboru naklonjeno časopisje, ki je vztrajalo pri jugoslovanstvu in centralizmu, je o koloniji večinoma pisalo naklonjeno, katoliškemu taboru naklonjeno časopisje, ki je zagovarjalo avtonomistično stališče, pa je bilo do kolonije bolj zadržano ali celo nenaklonjeno. V tridesetih letih so se pojavili tudi časopisi novih političnih in ideoloških gibanj, ki so v pisanje o koloniji vnesli drugačen ton.

KLJUČNE BESEDE: kolonialisti, časopisje, Kraljevina Jugoslavija, Bistrenica, narodnost

ABSTRACT

“Not Serbs, not Slovenes, not Catholics or Orthodox, not even Italian and our Citizens”: How the Slovenian Newspapers Reported on the Slovenian Colony in Bistrenica (Macedonia) 1930–1940

In the paper, the author addresses how Slovenian newspapers reported on the Slovenian colony in Bistrenica (Macedonia) in the period from 1930–1940. In this period, the national question stood at the center of Slovenian politics and culture. This question is also visible in the concurrent ideologically-torn newspapers that reported about the colony. The liberal press, steadfast in their support of centralism and Yugoslavdom, mostly wrote positively about the colony. Conversely, the press on the side of the Catholic camp, writing in favor of the autonomic stance and speaking out against Yugoslavdom in this cultural war, remained lukewarm or even unsupportive of the colony. In the 1930s, several other newspapers began to appear, becoming the center of political and ideological movements and offering different writing on the colony.

KEYWORDS: colonists, newspapers, Kingdom of Yugoslavia, Bistrenica, nationality

¹ Dr. znanosti, znanstveni sodelavec; Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, Novi trg 2, SI-1000 Ljubljana, mlekuz@zrc-sazu.si – Članek je nastal v okviru projektov »Nadzor nad migracijami na Slovenskem od Avstro-Ogrske do samostojne Slovenije« in »Made in YU: Kako so neljudje gor spravili Jugoslavijo« (ARRS, N5-0134) ter raziskovalnega programa »Narodna in kulturna identiteta slovenskega izseljenstva v kontekstu raziskovanja migracij« (ARRS, P5-0070).

UVOD

Pisanje zgodovine zgolj z listanjem časopisja je vprašljivo početje. Časopisje je pisalo le o nekaterih pojavih in dogodkih, o drugih pa je – hote ali nehote – molčalo. In tudi ko je pisalo o izbranih dogodkih in pojavih, je pisalo na izbran način – torej tako in ne drugače. A vendarle, ukvarjanje s takšno selektivno, iz časopisja iztisnjeno zgodovino ni neproduktivno početje. Pokaže nam, katere ideje, vrednote, prepričanja so bili v tem ali onem času na trgu idejne ponudbe in povpraševanja. In kar je bržkone še pomembneje – kako so te ideje delovale in se obnašale v (časopisni) praksi, ko so se bile prisiljene prilagajati takšni ali drugačni stvarnosti vsemogočih pojavov in dogodkov. Ob tem velja še dodati, da je bil časopis v obravnavanem času eden od najvplivnejših ideoloških in informacijskih aparatov, ki je dnevno zasipal slovensko beroče občinstvo z ideološkim in informacijskim blagom in tako vsakodnevno reproduciral obstoj naroda oziroma njegovo zamišljanje (cf. Anderson 2007).¹ In če naredimo še konkretniji korak v zgodovino: časopisje je »odpiralo prostor političnemu delovanju, ko je Jugoslavijo dušila diktatura kralja Aleksandra in so iz sveta pritiskali tokovi velike gospodarske krize tridesetih let [...]« (Amon 1996: 152).²

V članku odgovarjam na vprašanje, kako je slovensko časopisje pisalo o slovenski koloniji v Bistrenici (danes na jugovzhodu Republike Severne Makedonije, v nadaljevanju Makedonija) v letih 1930–1940, torej v času, ko je država ostajala trdno v primežu dinastije Karađorđevićev in ko sta kot politično vodilo režima ostajala centralizem in unitarizem. Oblikovanje in življenje slovenske naselbine ob Vardarju je že bilo predmet znanstvenih razprav (Rusić, Novak 1973; Drnovšek, Kalc 2014) kot tudi širšega zanimanja (Makuc 1986; Zupanič 2003), ki pa se ni dotaknilo časopisnega poročanja o tej največji in najbolj znani »slovenski koloniji« na jugovzhodu novonastale države. Naseljevanje slovenskih oziroma primorskih beguncev v obvardarsko vas pa je v časopisnem obtoku pogrevalo tudi eno od »osrednjih vprašanj slovenske politike in kulture« takratnega časa – t. i. »narodno vprašanje« (Amon 1996: 152; Perovšek 2005: 449; 2014: 235; Vodopivec 2006: 222). Kako torej misliti slovensko narodnost v novi jugoslovanski stvarnosti oziroma kaj z njo početi? Jo utopiti v novi, obsežnejši a nedoločnejši jugoslovanski »narodnosti« ali se taki narodni usodi upreti in se tako boriti za pravico do svojega jezika, kulture in celo lastne državnosti?

1 Veliko informacij je v obravnavanem času še vedno krožilo ustno. Govorice, pogovori v gostilnah, nagovori cerkvenih in drugih avtoritet so bili, kot pričajo literarna in druga dela iz obravnavanega časa, izjemno vpliven informacijski vir, ki je bil v primerjavi s časopisjem veliko bolj razpršen in je tudi bistveno težje ulovljiv in zato spregledan zgodovinski vir.

2 Pisanje zgodovine zgolj ali predvsem s časopisjem kot virom ni nobena novost. A je bila to največkrat vendarle nekakšna alternativa, ko je primanjkovalo drugih, predvsem arhivskih virov. Metod Mikuž (1965), ki je skoraj izključno s pomočjo časopisja spisal »zgodovino Slovencev v stari Jugoslaviji«, poudarja, da časopis, »skrbno prebran po dnevih, mesecih in letih [more] le nuditi neko razvojno podobo. Če na primer prebiramo sijajno urejevani nekdanji klerikalni dnevnik *Slovenec* ali staro socialnodemokratsko glasilo *Naprej*, dobimo dokaj točno podobo o razvoju, delu, politiki, taktiki itd. dveh slovenskih političnih strank.« (Mikuž 1965: 6)

Časopisna besedila o slovenski koloniji v Bistrenici ne prinašajo debat iz idejnih središč, idej v svoji prečiščeni obliki, temveč ideje na robovih, ko te postajajo kapilarne, se povezujejo z drugimi idejami, dogodki, pojavi in zaživijo v (časopisni) praksi. Zato takšno početje ni neplodno, saj nam na konkretnih primerih oziroma konkretnem primeru (oblikovanja in življenja slovenske kolonije) oriše delovanje idej, nazorov, prepričanj v (časopisni) praksi, ko se morajo ti udejanjiti v takšnem ali drugačnem časopisnem poročanju. S Foucaultovimi besedami (2001: 28): »Vsak moment diskurza moramo biti pripravljeni sprejeti v eruptivnosti dogodka.« V našem primeru bomo dodali: časopisnega dogodka. Ali, če zlorabim še Foucaultovo »izjavo«: Časopisna »[i]zjava je vedno dogodek, ki ga niti jezik niti pomen ne moreta nikoli povsem izčrpati« (Foucault 2001: 28). Z drugimi, manj »zlorabljenimi« besedami: iskal bom skladja, neskladja in robove med historično stvarnostjo in dominantnimi diskurzi, ki so bili na delu v tej historični stvarnosti.

Takšne zgodovine na robovih idej in njihovega povezovanja z vsemogočimi pojavi pa ne razumem kot tretjerazredne zgodovine, zgodovine, ki caplja za zgodovino velikih idej in dogodkov, kot zgodovino drobtinic velike zgodovine. Temveč prav nasprotno, kot zgodovino pisje, ki se skuša zgodovini oziroma historični stvarnosti kar najbolj približati. Perry Anderson (2012) pravi, da nam pri raziskovanju zgodovine več kot pravila povedo anomalije, saj te govorijo tudi o pravilih, medtem ko pravila govorijo le sama zase. Zgodovina anomalij pa se v tem besedilu ne nanaša le na zgodovino odstopajočih idej, idej na robovih, temveč tudi na sam pojav pod lupo raziskovanja. Mislim na izseljevanje, ki je v imaginariju naroda nekakšna amputacija dela narodnega telesa ali, če kirurški besednjak zamenjam z onkološkim, rak rana naroda (glej Drnovšek 2010; Kalc 2019).

KOLONIJA BISTRENICA

Naseljevanje primorskih beguncev v Bistrenico je treba razumeti v luči notranje kolonizacije in politike, ki jo je jugoslovanska država na tem področju vodila iz gospodarskih, socialnih in političnih razlogov, ter reševanja slovenskih in hrvaških beguncev iz Julijske krajine (Kalc 1996: 33; Drnovšek, Kalc 2014: 97–98). Slovenske naselebne, večina njihovih prebivalcev je bila primorskih beguncev, so tako že od začetka dvajsetih let 20. stoletja nastajale na različnih koncih države: v Prekmurju (Ravnik 2002: 55), v Bosni in Hercegovini (Papež Adamič 2009: 25), v Makedoniji in na Kosovu.³ Gospodarska kriza ob koncu dvajsetih let in povečanje nezaposlenosti ter povratniškega toka iz tujine so okrepili naseljevanje predvsem južnih delov države. Za kolonializacijo in

3 Številni begunci, med njimi so bili tudi izobraženci, so se naseljevali tudi po mestih, kjer v nasprotju s t. i. »slovenskimi naselebinami« seveda niso tvorili teritorialno homogenih narodnostnih skupnosti. V Kraljevu je bilo med svetovnimi vojnami preko 600 katoličanov, večinoma Slovencev iz Julijske krajine, ki so leta 1933 zgradili katoliško cerkev (Krejakovič, Strle 2011).

agrarno reformo pa niso stali samo gospodarski in socialni vzroki, temveč tudi nacionalni in verski, saj je ta bila usmerjena predvsem na med vojno in po njej izpraznjena območja, kjer so pred tem živele neslovanske skupnosti. Notranja kolonizacija je v času prve Jugoslavije postala tudi pomemben del izseljenske nacionalne politike – nekakšna pozitivna alternativa izseljevanju v tujino, tako pri vprašanju uravnavanja družbenoekonomskih ravnovesij kot tudi pri »narodnoobrambnih« in »bioloških« vprašanjih (več o tem, kako je Jugoslavija oblikovala migracijsko politiko v skladu s promoviranjem naseljevanja pripadnikov konstitutivnega naroda glej Brunnbauer 2012; več o nadzoru nad migracijami v tem času glej Kalc 2016). Migracije med obema vojnoma namreč postanejo zelo pomemben del nacionalnih politik oziroma t. i. narodnega vprašanja posameznih držav. Kljub temu pa je bila kolonializacija v prvi Jugoslaviji slabo organizirana, spremljale so jo številne težave in nezmožnost slediti povpraševanju (Drnovšek, Kalc 2014: 97–102).⁴

Kolonija Bistrenica je na začetku leta 1931 nastala na pobudo nekdanjega tržaškega, nato beograjskega advokata dr. Ivana Marije Čoka, ki je pri jugoslovanski vladi zastopal primorske Slovence in je odigral vidno vlogo kot pospeševalec kolonizacije Južne Srbije⁵ (več o Čoku glej Kalc 1993). Pri nastanku kolonije je imel pomembno vlogo tudi nekdanji uradni upravnik v Trstu, pozneje ljubljanski odvetnik dr. Vilko Baltič, ki je v dvajsetih letih nadaljeval uspešno kariero javnega funkcionarja, sprva kot predsednik slovenske deželne vlade, nato pa kot veliki župan ljubljanske, užiške in beograjske oblasti. Čok in Baltič sta se leta 1929 kot »predstavnik skupine izseljencev iz Julijske krajine« obrnila na Zvezo agrarnih zadrug v Skopju (Savez agrarnih zajednic v Skopju), ki je začela odkupovati zemljo od izseljujočih se Turkov in od prejšnjih kolonistov v Bistrenici. Čok je januarja 1931 na javnem predavanju v Ljubljani predstavil območje in praktične vidike kolonizacije. Že pred tem je o Čokovem načrtu poročalo tudi slovensko časopisje. Po tem poročanju naj bi se za kolonijo zanimalo okoli 500 interesentov, poleg beguncev iz Julijske krajine tudi nekateri iz Dravske banovine.

Januarja 1931 se je prva skupina kolonialistov v družbi Čoka in učitelja Janka Furlana odpravila v Makedonijo, kjer so ustanovili Skupnost beguncev iz Julijske krajine (Zajednica izbeglica iz Julijske krajine), ki je od Zveze agrarnih skupnosti v Skopju odkupila 400 hektarov zemljišča v Bistrenici, najela posojilo za gradnjo hiš, nakup opreme in ureditev vsega, kar so potrebovali za naselitev. Kolonija pa se ni razvijala po pričakovanjih – novih naseljencev je bilo malo, mnogi so jo tudi hitro zapustili. Tako je v koloniji poleti 1932 živelo le 32 ljudi, konec leta 68, do takrat jo je zapustilo že 180 oseb. Leta 1934 je kolonija štela 200 ljudi, med katerimi so bile družine (47)

4 Vprašanje notranje kolonizacije je urejala uredba o naseljevanju novih južnih pokrajin iz leta 1920 in nato uredba in zakon o naseljevanju novih južnih krajin iz leta 1929 oziroma 1931. Država je določila zemljišča, namenjena kolonialistom: prosta državna zemljišča vseh vrst (ki so se dodeljevala po načelih zakona o agrarni reformi), presežna občinska in vaška zemljišča, trajno opuščena zasebna zemljišča in odmetniška posestva (Drnovšek, Kalc 2014: 100).

5 Izraz Južna Srbija je v času med obema svetovnima vojnoma zajemal teritorij današnje Makedonije, Kosova in skrajnega južnega dela Srbije.

in posamezniki, med njimi predvsem kmetje pa tudi kamnarji, zidarji in drugi poklici. Nekateri so posedovali lastne kmetije (zemlja je bila razdeljena tako, da je vsaka kmetija razpolagala z zemljišči različne kakovosti), drugi so bili mezdni delavci na zadružnih zemljiščih.

Kolonija se je soočala s številnimi težavami: z neurejenim lastništvom zasebnih zemljišč oziroma nerazdeljenimi in neobdelanimi zemljišči (ki jih pristojni organi niso izmerili), nepoznavanjem terena, načinov obdelave, kultur (poleg žitaric, krompirja in vrtnin so gojili tudi tipične lokalne kulture, kot so tobak, mak in sezam, pozneje pa so uvajali tudi nove, kot npr. lubenice in beluše), s slabimi prometnimi povezavami, pomanjkanjem denarja za nakup živine in s tem neizkoriščenimi pašniškimi površinami, z zadolženostjo in s slabim vodenjem zadruge (zadruga je imela v lasti stroje, ki so se uporabljali za obdelovanje zadružne zemlje), slabimi stanovanjskimi razmerami (ki jih je še poslabšal potres marca 1931), z malaričnimi obolelostmi, s težkimi klimatskimi razmerami, z medsebojnimi trenji idr. Začetek druge svetovne vojne oziroma bolgarska zasedba Makedonije sta pomenila tudi konec kolonije. Vojska je kolonialistom pobrala zemljo, vozove in živino, večina ljudi se je izselila ali končala v izgnanstvu ali partizanih. Do leta 1948 so Bistrenico zapustili še skoraj vsi preostali slovenski kolonialisti in njihovi potomci (Rusić, Novak 1973; Makuc 1986; Drnovšek, Kalc 2014: 102–105).

OPIS IN ANALIZA POROČANJA

Nabor člankov o slovenski naselbini Bistrenica, ki mi ga je uspelo zbrati s pomočjo iskanja z geslom »Bistrenica« v Digitalni knjižnici Slovenije (DLIB) in z dodatnim iskanjem v časopisju omenjenih člankov, obsega 31 enot.⁶ Številka 31 pa zahteva pojasnilo. Dva članka se (skoraj) v identični obliki, toda pod drugimi naslovi pojavita večkrat (eden šestkrat in drugi trikrat), tako da je »izvirnih« oziroma neponavljajočih se besedil (seveda z drugimi naslovi) 24. Med temi članki pa so tudi taki, ki Bistrenico le na kratko omenijo ali je neposredno sploh ne omenijo, je pa iz besedila razvidno, da pišejo o slovenski koloniji ob Vardarju.

Vsi članki z izjemo treh so bili objavljeni med oktobrom 1930 in koncem leta 1934, nekaj v času diktature, predvsem pa v letih »oktroirane« ali vsiljene ustave, s katero je bila Jugoslavija znova ustavno opredeljena kot dedna kraljevina z dinastijo Karađorđević na čelu. Diktatura kralja Aleksandra Karađorđevića, razglašena 6. januarja 1929, ki je razveljavila Vidovdansko ustavo, je z Zakonom o zaščiti javne varnosti in reda v državi prepovedala vse politične stranke; te so svoje delovanje nadaljevale v različnih društvih in organizacijah. Smo torej v specifičnem političnem času, ki se je, kot vidimo v nadaljevanju, odražal tudi v časopisju.

Nabor člankov je pokazal, da gre v večini primerov za nekakšne grozde vsebinsko ali tematsko med seboj povezanih člankov, ki jih aktivira neki dogodek ali »problem«

6 V DLIB-u sem z geslom iskal maja 2019.

in ki se pojavijo v relativno omejenem časovnem obdobju (glej seznam na koncu besedila). V nadaljevanju opisujem časovni potek poročanja in se nekoliko dlje ustavim ob grozdih člankov, kjer pridejo na dan različni pogledi na t. i. narodno vprašanje.

Začetek časopisnega poročanja o slovenski naselitvi Bisternice je kratka novica, v kateri pa se skriva tudi ali predvsem »oglasno sporočilo«. Ta novica – oglas je bil sprva objavljen v *Slovenskem narodu* (6. 10. 1930, »Emigrantom iz Julijske krajine, ki se želijo naseliti v Južni Srbiji«, rubrika »Dnevne vesti«), dan pozneje (7. 10. 1930) v *Slovincu* (»Primorski Slovenci v Južno Srbijo«), *Jutru* (»Emigrantom iz Julijske krajine, ki se želijo naseliti v Južni Srbiji«, rubrika »Domače vesti«) in *Jugoslovanu* (»Emigrantom iz Julijske krajine«, rubrika »Dnevne vesti«), še dan pozneje v *Kmetiskem listu* (8. 10. 1930, brez naslova) in slab mesec pozneje v ameriški *Novi dobi* (5. 11. 1930, brez samostojnega naslova, rubrika »Glasovi iz rodne grude«). Gre za skoraj identično besedilo, v katerem beremo, da

Savez agrarnih zajednic v Skoplju nudi Primorcem, priseljenim v Jugoslavijo, priliko za naselitev v Južni Srbiji, zlasti v bližini Skoplja, v srezu negotinskem ob reki Vardaru in ob glavni železniški progi in cesti Beograd–Solun. V selu Bistrenici ob Vardaru leže lepa polja, brda, pašniki in nekaj prav mičnih skoro novih pritličnih hiš, pripravnih za koloniste, ki bi se bavili s kmetijskimi panogami, vinogradništvom, sadjarstvom, vrtarstvom, živinorejo, perutninarstvom in drugim. Zemlja je prvovrstna. Voda izvirna. Podnebje milo, z redkimi in izginjajočimi slučaji malarije. Savez agrarnih zajednic odstopa zemljišče proti takojšnjem u odplačilu ene petine kupne cene (ki je prav nizka), ostalo na amortizacijo v desetih letih. Za kolonijo Bistrenica se je prijavilo že lepo število reflektantov [...]

Besedilo nadalje vabi »[p]oštene, delazmožne družine, naj se takoj prijavijo z navedbo članov družine in drugih okolnosti, ki so važne [...]« na naslov Informativnega biroja v Beogradu.

Konec istega meseca (oktober 1930) so sledili štirje članki o kolonizaciji v Južni Srbiji, ki Bistrenice večinoma ne omenjajo z imenom, a ta nastopa kot predmet časopisnega poročanja. To pa so tudi besedila, ki v pisanje vnašajo bolj angažiran ton, besedila, ki ne le informirajo, temveč stik z naslovnikom vzpostavljajo z vplivanjskimi, apelnimi in vrednotilnimi sredstvi, torej tudi vrednotijo in prepričujejo (glej Košir 1988: 63; Korošec 1998: 12; Kalin Golob 1999). Sprva je *Slovenec* objavil kratek anonimni dopis iz Južne Srbije, najverjetneje slovenskega naseljence v teh krajih (»Kolonizacija v Južni Srbiji«, 23. 10. 1930). Ta se sklicuje na »reklamni oklic informacijskega biroja iz Beograda« in odsvetuje naseljevanje v Vardarski dolini oziroma Bistrenici, kjer vlada »najhujše in najnevarnejše poletje« in je »najhujše leglo malarije«. Sviri pred »politiko Saveza agr. zajednic«, ki »ima mogoče svojo upravičenost s splošno državnih vidikov«, ne strinja pa se, »da se naši begunci porabljaajo ... [za kaj, ni napisano, ker sledi cenzurirana, torej prazna vrstica]«. Pisec predlaga naseljevanje v Metohiji in na Kosovu, kjer je zemlje dovolj in »klima je ista kakor pri nas«. »Ravno ti kraji so pa

izven interesne sfere ›Saveza«. Organizacijam, »ki se bavijo s kolonizacijo beguncev iz Julijske Benečije«, svetuje, da »se obvestijo podrobno o vseh delih južne Srbije in ne hodijo po svoje informacije samo v ›Savez‹ in da se pri svoji akciji osamosvoje, če nočejo doživeti velikega razočaranja«.

Sledi članek v *Jutru* (26. 10. 1930) z naslovom »Kolonizacija v Južni Srbiji« in s podnaslovom »Nekaj praktičnih miglajev za vse, bi se radi ustanovili na Jugu države«. Članek, ki sicer ne omenja posebej Bistrenice (članek primerja razmere in pogoje »v dolini Črne reke v jugovzhodni Makedoniji« in »ob strugi Vardarja«), večinoma pri naša to, kar napoveduje v podnaslovu: informacije o razpoložljivosti in ceni posestev, kvaliteti prsti, piše o pomanjkanju gozdov, nevarnosti malarije, pitni vodi, ki ni povsod dostopna, na koncu pa tudi o »ogromni razliki« »v načinu življenja naših krajev in južne Srbije«. Med drugim tudi zapiše: »Naši ljudje, ki se kanijo naseliti v Južni Srbiji, veljajo za kras kulture in smoternega dela. Gotovo jih bo doletela zelo častna naloga, da kraje, v katerih se bodo naselili, kulturno in gospodarsko dvignejo.«

Članku sledi (takoj na isti strani) nepodpisano besedilo z naslovom »Naše notranje naseljevanje« in s podnaslovom »Veliko zanimanje za naselitev v Povardarju – oglašajo se škodljivci«. Besedilo, ki bi ga lahko razumeli tudi kot poglavje prejšnjega članka, posredno ne omenja Bistrenice, se pa na začetku sklicuje na »poziv [ki ga tudi podrobno povzame], s katerim so se vabili interesenti, da se obrnejo za tozadevna pojasnila na informacijski urad v Beogradu«, ki je že dobil »celo vrsto pismenih in ustmenih vprašanj in ponudb iz raznih krajev naše države, pa tudi od naših izseljencev, ki se živo zanimajo za to kolonizacijo in so pripravljeni, da takoj zapuste inozemstvo in se naselijo tam doli ob Vardarju in še tembolj, ko so pogoji za nakup zemljišča tako ugodni in se naseljencem obeta tako lepa bodočnost.« Besedilo nadaljuje v pozitivnem, navdušujočem tonu:

Sodeč po teh mnogoštevilnih vprašanjih, bo to prvo kolonizacijsko področje daleč pretesno, da bi se moglo ugoditi ako že ne vsem, pač pa vsaj večjemu številu priglancev in bo treba že takoj sedaj skrbeti za drug tak kolonizacijski kraj. Stvar ne bo postala gotovo še nujnejša v par letih, ko se pokažejo prvi dejanski uspehi kolonizacije, ko se pokaže, kaj vse in v kaki odlični kakovosti more dajati ta zemlja svojemu obdelovalcu, ki jo hoče in zna obdelovati.

Nato se anonimni avtor obrne na in obregne ob *Slovenčev* članek, razgrne navdušujoč pogled na kolonializacijo in ob tem sicer implicitno servira tudi svoj širši odnos do narodnega vprašanja v jugoslovanski stvarnosti:

Njim [naslavlja »škodljivce« iz podnaslova članka – bržkone dopis iz *Slovenca* in poročanje beneškega *Il Gazzettina* iz Zagreba] ne gre v glavo, da bi si mogel in smel n. pr. Slovenec ustvariti nov dom med Srbi, da bi se Hrvat z zapadne državne meje ne mogel naseliti tam doli ob Vardarju, kakor da si nismo vsi bratje in kakor da bi se morali večno prepirati in biti med seboj, sebi v škodo, tujcu pa v korist. Tako so ti naši

prijatelji tudi v tem primeru hitro našli dlako v jajcu, da bi ustrašili z njo naše ljudi, ki se žele naseliti v vardarski banovini. In ker gre sedaj za prvo tako akcijo v večjem obsegu, ki bi naj bila vzor vsem naslednjim, so se še tembolj podvizali, češ, če se pokvari ta prva akcija, ji druge sploh ne bodo sledile in notranja kolonizacija, ki naj bi bila obenem dokaz našega notranjega pomirjenja in močan prispevek h gospodarski povzdigi naše države, bi propadla za nedogleden čas. Tako so pač računali in udarili na veliki boben, češ da hočemo zlorabljeni primorske begunce za to, da bi nam obdelovali malarično ozemlje. [...] Jasno je, da gre pri tem hujskanju le za to, da bi se naši ljudje, pa naj so s te ali one strani meje, odvrnili od naselitve v krajih, kjer se jim obeta najlepša bodočnost, vse drugačna kot je bila njihova – minulost, kjer bodo v miru, redu in pokoju lahko uživali plodove svojega dela. Malaria jim je le pretveza, ko je vendar splošno znano, da je ravno v naši državi in prav v teh krajih protimalarična zdravstvena služba urejena tako dobro, da si jo celo velesile jemljejo za vzor in pošiljajo k nam svoje zdravniške misije, da jo proučujejo. In z malarijo je pač tako, da tam, kjer z umnim delom zavladata snaga in red, izgine ta bolezen. [...] Nekdanja turška nesnaga in nemarnost se je z bivšimi lastniki vred izselila in z njo tudi malaria. Kak posamezni slučaj se pač res še pojavi, toda tudi to bo izginilo, ko z novimi ljudmi zaveje nov duh po teh krajih. Naši ljudje, ki so si ogledali te kraje, so se prepričali z lastnimi očmi, da bi bilo težko najti kaj primernejšega za naselitev. To bo pač več veljalo, kot bevskanje tistih, ki nam nikdar niso želeli dobro, temveč vedno le najhujše.

Pet dni pozneje (31. 10. 1930) v *Jutru* sledi še en nepodpisan članek z naslovom »Resnica o kolonizaciji v Povardarju«. Besedilo sprva povzame pisanje obeh prejšnjih člankov in nato razgrne svoj namen: »Ni naš namen, da bi se pričekali s ›Slovenčevim‹ dopisnikom iz Južne Srbije«, niti da bi osporavali nekatera navajanja M. H. [članek »Kolonizacija v Južni Srbiji: Nekaj praktičnih migljajev za vse, bi se radi ustanovili na Jugu države«], »temveč hočemo v kratkem pojasniti vsem in vsakomur, kaj in kako je s kolonizacijsko akcijo v Povardarju, v Bistrenici v negotinskem srezu, kar bo obenem tudi najboljši odgovor vsem tistim, ki bi hoteli odvrniti naše ljudi od naselitve v tem kraju.« Besedilo nato našteva vrsto ugodnosti, kot je pitna voda, lahko rešljiv problem malarije (po *Slovenčevem* dopisniku najhujše leglo malarije), vmes pohvali delovanje »Saveza zdravstvenih zadrug« (»Američani z navdušenjem govore o naših zdravstvenih ustanovah in so jih sami začeli posnemati in take zadruge delujejo poleg državnih ustanov tudi v Povardarju«), nato podrobno govori o zemlji, ki se je »pred leti [...] lepo obdelovala« in da vsak »kolonist dobi nekaj zemlje v ravnini, nekaj pa v bregu, prikladnem za vinograd«, »občinskem zemljišču«, kjer »sme vsak kolonist pasti do 50 ovac«, razpoložljivosti drv, stanovanj, gradbenega materiala, vprežne živine, orodja, ceni zemljišč, pogojih plačila, delovanju zadruge, legi Bisternice in njeni prometni dostopnosti, oddaljenosti šole, zdravnika, (Katoliške) cerkve. Pomanjkljivosti anonimni pisec ne omenja in besedilo optimistično konča:

Da pa se bo v to kolonizacijo vloženi denar bogato obrestoval, pa jamči izredno rodovitna zemlja, milo podnebje, ki omogoča vse panoge poljedelstva, in ugodna lega za razpečavanje pridelkov. Da bi kdo silil koga, da se tu naseli, je popolnoma izključeno. Komur pa je všeč, kar si je strokovnjaško oko temeljito ogledalo in je primorska pamet po tehtnem preudarku spoznala za najprimernejše, pa naj se da točno poučiti o stvari ali pa naj si ogleda kraj sam, pa naj potem stori, kakor misli. Po našem trdnem prepričanju bomo v kratkem imeli v Bistrenici–Dubljanih primorsko kolonijo, ki bo v nekaj letih pravi biser Povardarja in vzor vsej naši notranji kolonizaciji.

Čeprav sta bila anonimna pisca obeh besedil bržkone tesno vpeta v kolonizacijo in sta imela (tudi) zelo osebne razloge za različno opisovanje razmer v Bistrenici, različen pogled na naseljevanje slovenskih kolonialistov v Bistrenico v *Slovencu* in *Jutru* najverjetneje ni povsem naključen in sloni tudi na razlikah v razumevanju t. i. narodnega vprašanja v času prve Jugoslavije. Razumevanje narodnosti, postavljeno v presečišču med slovenstvom in jugoslovanstvom, je namreč slovensko politiko v prvi Jugoslaviji razdelilo na dve ostro ločeni strani. Prva, katere najvidnejši predstavnik je bila liberalna politika, je zagovarjala jugoslovansko unitaristično in centralistično stališče. Poudarjala je, da je z nastankom jugoslovanske države nastopil čas oblikovanja enotnega jugoslovanskega naroda, kar naj bi bil naraven in zgodovinsko utemeljen zaključek do tedaj nepovezanega razvoja posameznih južnoslovanskih etnij. Liberalni unitaristični narodnopolitični pogled je kljub posameznim zagotovilom o spoštovanju slovenske identitete težil k nadomeščanju te z jugoslovanstvom. (Perovšek 2005: 453; 2009: 166–171; 2013: 272; 2014: 235–237)

Tovrstno stališče se odraža tudi v pisanju takrat osrednjih dveh liberalnih časopisov na Slovenskem – *Jutru* in *Slovenskem narodu*. Večinski del slovenskega naroda in slovenske politike je zagovarjal avtonomistično-federalistično stališče ter je na podlagi zagovarjanja slovenske narodne individualnosti zahteval federativno preoblikovanje jugoslovanske države in vzpostavitev upravno enotne avtonomne Slovenije (v praksi je bil precej pragmatičen in oportunističen). Tudi avtonomistično-federalistično stališče so zagovarjale različne politične struje. Najvplivnejša predstavnička tega tabora je bila najmočnejša slovenska stranka – katoliška Slovenska ljudska stranka (SLS), ki je svoj narodnopolitični program v različnih oblikah in z različno intenzivnostjo zagovarjala do leta 1941 (Perovšek 2005: 449–452; 2009: 172–179; 2014: 237–242) in je svoja stališča izražala tudi ali predvsem s pomočjo *Slovenca* – vodilnega časnika političnega katolicizma na Slovenskem (za različne poglede na narodno vprašanje v času prve Jugoslavije glej Mikuž 1965; Perovšek 2005, 2009, 2014; Vodopivec 2006; za umestitev časopisja v politični in ideološki okvir glej Mikuž 1965; Amon 1996; oziroma za kritiko tega pogleda Nežmah 2013: 9). Čeprav v pisanju *Jutra* ni mogoče zaznati kakšnega jasnega priseganja na unitarizem in v dopisu *Slovenca* ni nič »avtonomističnega«, pozitivno pisanje *Jutra* in previdno ali celo kritično pisanje *Slovenca* o kolonizaciji bržkone ni povsem naključno in odraža različne poglede na slovensko narodno vprašanje v jugoslovanski državi.

Sledijo trije članki, ki so nastali na podlagi predavanja Ivana Marije Čoka v organizaciji ljubljanskega izseljenskega društva Soča v »nabito polni« dvorani pri Levu. *Slovenec* (»Kolonizacija Južne Srbije«, 20. 1. 1931) dogodek povzema informativno, le konča ga z »dobrimi željami«: »V prepričanju, da bodo slovenski kolonisti v Južni Srbiji vršili veliko ekonomsko, kulturno in nacionalno misijo, jim želimo čim več uspehov.« *Jutro* (»Dr. Čok o kolonizaciji v Južni Srbiji«, 20. 1. 1931) je prav tako večinoma informativno, a mestoma ne skopari tudi z vrednotenjem oziroma navdušenjem: »Za naselitev se je prijaviło že nad 500 interesentov, pričakovati pa je še novih prijav in za vse te interesente bo še treba najti zemljo v Macedoniji, da si tam osnujejo svoje nove domačije ter z vzglednim gospodarjenjem pretvorijo vso Južno Srbijo v najbogatejšo pokrajino Jugoslavije.« Klerikalni, toda režimski *Jugoslovan* (»V Južni Srbiji se osnuje prva primorska naselbina«, 20. 1. 1931; več o dnevniku *Jugoslovan* v letih 1930–1931 glej v Pleterski 1999), ki nakazuje na to, da zgornja delitev na klerikalno-avtonomistični in liberalno-unitaristični pol ni bila vseobsegajoča, prav tako povzema Čokovo predavanje in se nad njegovo »kolonizacijsko akcijo« tudi navdušuje. V besedilo vnese tudi pogled na (slovensko) nacionalno vprašanje v Jugoslaviji:

Čez nekaj desetletij bo Macedonija z umnim gospodarstvom naših ljudi lahko postala najbogatejša pokrajina naše države. Tudi v nacionalnem oziru bo kolonizacijska akcija Primorcev nedvomno vodila do krasnih rezultatov. Pričakovati je, da bodo prekvalificirali tamošnje prebivalstvo, ki nam je zelo blizu po svojem macedonskem dialektu in da bo pričela prodirati jugoslovanska ideja od juga navzgor proti severu.

Sledijo štirje članki o potresu, ki je prizadel »Južno Srbijo« 7. marca 1931. *Jutro* sprva stanje v »slovenski koloniji« na kratko opiše v poglavju daljšega članka o potresu (»Naši kraji in ljudje. Ko se ruši zemlja in odpira nebo ...«, 15. 3. 1931), nato *Slovenec* (»Slovenski naseljenci o potresnem ozemlju. Poročilo o slovenskih naseljencih v južni Srbiji«), *Jutro* (»Naši kraji in ljudje. Po potresu pri naših kolonistih«) in *Jugoslovan* (»Iz drugih Banovin. Dr. Čok o koloniji Bistrenici po potresu«, vsi 19. 3. 1931) objavijo identični dopis Ivana Marije Čoka, ki je obiskal popotresno Bistrenico in se razpisal tudi o popotresni »morali« kolonije: »Morala, ki je bila že pred potresom v naselbini najboljša, je ostala po potresu nespremenjena; če mogoče jo je potres še bolj utrdil, ker se vsi naseljenci čutijo še bolj navezani drug na drugega.«

Dodatno dimenzijo v to dotedanje relativno majhno časopisno razhajanje v pisanju o slovenski koloniji v Bistrenici vnesejo članki o prestopu dela slovenskih kolonialistov v pravoslavno vero, delno pa tudi članki o »verski oskrbi« Slovencev v Bistrenici in drugih delih »Južne Srbije«. O tem dogodku prvič beremo v kratki novici o »selu Bistrenica« v »skrbno urejevanem« katoliškem tedniku *Domoljub* v rubriki »Iz naše prestolnice« (16. 3. 1932), ki se konča z informacijo, da »[z]a Slovence, ki so prestopili v pravoslavno vero, se bo zidala tudi cerkev za 4 milijone dinarjev«.

Oktobra istega leta *Slovenec* (7. 10. 1932) pod naslovom »Iz življenja Slovencev ob Vardarju« objavi brez komentarja in v navednicah (torej dobesedno, bržkone le

v prevodu) dopis »Glasnika srpske pravoslavne patriarhije«. Besedilo govori o tem, kako so »Begunci iz naše Istre, naseljeni v vasi Bistrenici [...] izrazili takoj po prihodu v te kraje [...] željo, da bi radi prestopili s svojimi družinami v pravoslavje«, o gradnji in posvetitvi pravoslavne cerkve v vasi, o »obredu »prestopa rimsko-katoliških vernikov v pravoslavno cerkev«, ki se je zgodil »prostovoljno in z ljubeznijo v sveto pravoslavno cerkev«, o »odličnih gostih, ki so »prisostvovali tem svečanostim« ...

Na *Slovenčevo* »poročilo brez pripombe« se je odzval nacionalsocialistični, jugoslovanski *Pohod* (več o časopisu in gibanju okoli časopisa glej Mikuž 1965: 424; Amon 1996: 171–172.) Tradicionalna slovenska delitev na katoliški in liberalni tabor ni več omogočala izražanja novih političnih in svetovnonazorskih stališč, zato so se v tridesetih letih pojavili novi časopisi, okrog katerih so se organizirala politična in ideološka gibanja (Amon 1965: 151). Med njimi je bilo tudi gibanje okoli glasila *Pohod*, ki je videlo »rešilno pot v nacionalnem pogledu na desno, v socialnem pa na levo«, se navduševalo nad Hitlerjevo Nemčijo, apeliralo k nakupovanju domačega blaga ... [...] in strmelo k imperiju – Jugoslaviji, balkanski velesili od Tilmonta do Črnega morja (Mikuž 1965: 424). *Pohodov* članek »Film naše Zemlje. Iz življenja Slovencev ob Vardarju« (15. 10. 1932) je sprva objavil celotni *Slovenčev* dopis in nato serviral še svoj komentar:

»Slovenec« je priobčil poročilo brez pripombe. Mi razumemo ta debeli tisk in ta molk. »Slovenec« je hotel, da bi to poročilo čitali v Rimu – saj tam ta list gotovo čitajo – in je vse tako podčrtal, da bi v Vatikanu česa ne prezrli, in ni dodal nikake opazke, ker si je mislil, da bodo v Rimu itak dobro razumeli, kaj je hotel s tem povedati, namreč: kako se mora naš narod izseljevati iz Istre in Primorja, ker nima na svoji zemlji pravice mirno živeti, kako si je moral poiskati nov dom ob Vardarju, in ker je izkusil, da niti v svoji cerkvi v Istri in Primorju ni smel več Boga moliti v svojem jeziku in katoliška cerkev ni hotela – ali pa vkljub svoji vesoljnosti – ni mogla pomagati preganjanemu narodu – zato je prestopil v bratsko slovansko pravoslavno cerkev, kjer se časti in slavi isti Bog in ima narodni jezik vse pravice. »Slovenec« je hotel gotovo opozoriti Vatikan, kam vodi tako postopanje v našem Primorju in je gotovo hotel reči, da je nevarno, da bodo še drugi sledili temu zgledu, da naj torej pazi Rim, da ne bo katoliška cerkev škode trpela ...

K tej kritiki Katoliške cerkve stisne še nekaj cinizma:

V isti številki čitamo, da bodo zamorčki peli slovenske pesmi. Pomislite, kakšna pridobitev! Ne po besedilu seveda, ampak samo po napevu. Misijonski brat Kolenc iz Južne Afrike namreč piše, da je tam neki nemški misijonar, ki so mu vseč naše pesmi (posebno cerkvene), zato prosi, naj mu pošljemo »Pesmarico« ali »Sv. Cecilijo«, da bo učil zamorčke po naših napevih peti. (Nekako tako, kakor je to delal Prešernov »Orgljar« s ptičkii!) Tako bodo torej zamorčki peli slovenske napeve in se bodo s tem vsaj malo oddolžili za ves denar, kar so ga Slovenci že zanje nabrali. (Pa bo za nas menda

tudi edini uspeh našega »misijonskega dela«.) Pa tudi to bo zanimivo, da zdaj, ko hodi Evropa v Afriko in v druge divje kraje po razne melodije za jazz, pesem in ples, bo Afrika za revanžo sprejela naše slovenske napeve, na kar smo res lahko ponosni. Tako bo poskrbljeno, da bomo pri zamorčkih, ki so važna skrb za slovenski narod, pridobili, kar smo izgubili z onimi ob Vardarju.

Prestop v pravoslavje pa s tem ni doživel svojega časopisnega konca. Mesece in leta pozneje se je tako ali drugače znašlo v vsemogočih novicah, »pismih«, reportažah in drugih časopisnih žanrih. V novici o verskem življenju v Bistrenici je *Izseljenski Vestnik* v rubriki »Kako se razvijajo naši po svetu? Na domačem jugu« (november 1933) predvsem poudaril potrebo po Katoliški cerkvi. Tako beremo: »Imajo pravoslavno cerkev, ker so nekateri prestopili v pravoslavje. Tudi svojega popa imajo. Žalostni so pa drugi, ki bi si pa radi postavili katoliško cerkev. Vse že imajo: denar in načrte, samo zemljišča jim ne da Zadruga. Vkljub težavam pa upamo, da bomo dobili tudi kat. cerkev.«

Potreba po Katoliški cerkvi med Slovenci se je v Bistrenici in na jugu države pogosto znašla v raznih »pismih« katoliških časopisov in publikacij. Tako v tristranskem »Pismu iz Južne Srbije« (*Koledar Družbe sv. Mohorja*, 1934) med drugim beremo: »Nekateri so prestopili v pravoslavje, na hribu so jim zgradili cerkvico, dobili so tudi svojega pravoslavnega popa. Katoliška cerkvica jim bo ustvarila šele pristno domače življenje.« V članku z naslovom »Iz Južne Srbije« pa Alojzij Turk iz Skopja (*Izseljenski Vestnik*, maj 1937) k tožbam o pomanjkanju cerkva in verske vzgoje v teh krajih doda tudi osebno zgodbo iz Bistrenice, ki jo zabeli z biblijskimi besedami:

Cerkev v Bistrenici je posvečena sv. Jožefu. Lansko leto smo tamkaj prvokrat imeli »žegnanje«, seveda ne tako živahno kakor je to v slovenskih župnijah. Zbrali smo se vsi v novi cerkvi in tudi skoro vsi navzoči so bili pri spovedi in sv. obhajilu. V svojih molitvah smo se prav posebej spominjali onih naših rojakov, ki so v tej naselbini odpadli od katoliške vere, seveda ne iz prepričanja ... Nekateri odpadniki so sicer prav nalašč, da bi dokazali svojo mržnjo do kat. vere in kat. rojakov, ki se niso hoteli prodati za Judeževe srebrnjake, delali težaška dela, orali, kopali ... V cerkvi sem govoril o izgubljenem sinu in usmiljenju božjem. Pa je pozneje pristopil na samem k meni odpadli možak in v solzah spregovoril: »Tudi jaz sem tak izgubljeni sin!« Pa sem ga vprašal, kako dolgo še misli izgubljen ostati, ko vendar ve, da ga oče nazaj želi in vabi. Žalosten je dejal, da se tu boji, in je zopet izginil ...

Takšnih tožb o pomanjkanju cerkva in verske vzgoje pa tudi jezika v nekatoliškem časopisju ni. So pa sem in tja izražene drugačne potrebe. »Pismo iz slovenske kolonije ob Vardarju« (*Jutro*, 27. 11. 1933) nepodpisanega naseljenca kolonije tako poudari potrebo po ustanovitvi sokolske čete.

A vendarle ta dogodek v katoliškem časopisju ne artikulira – ali vsaj ne bolj jasno – pogleda na narodno vprašanje v prvi Jugoslaviji. Ta se je jasneje oblikoval šele v ideološko zelo naelektrenem obdobju ob koncu tridesetih let, v času, ko je pisanje

o Bistrenici večinoma izginilo iz časopisja, v katoliškem dnevniku *Slovenski dom* (18. 11. 1939, »Predavanje vikarja g. Zakrajška o raztresenih otočkih slovenskega življa v Južni Srbiji«):

Pri naseljevanju so se ozirali na to, da bi pomešali najrazličnejše ljudi, ki naj bi naredili Jugoslovane. Zaradi raznih neprilik »Prečani« odhajajo v Banat in Slavonijo. Pa tudi naša naseljevalna politika je povsem založena. To nam kaže Bistrenica, kjer sta dr. Baltič in dr. Čok pred desetimi leti ustanovila bistreniško agrarno zadrugo naseljencev iz Julijske Krajine, kjer so se naselili neizkušeni slovenski fantje iz Goriške. Vse je padlo v vodo in letos bi se morala vršiti prodaja tega nesmotrnega in založenega gospodarstva. [...] Ti ljudje niso nobene narodnosti in še danes nimajo državljanstva.

Slovenčev članek ob tem predavanju (»Slovenci v južni Srbiji. Zanimive podrobnosti iz predavanja kapitularnega vikarja g. Viktorja Zakrajška o slovenskem življu v južni Srbiji«, *Slovenec*, 22. 11. 1939) pa je nekoliko manj kritičen do »naseljevalne politike« in tudi manj jasen glede »narodnega vprašanja«: »Žalostno je še to, da večina naseljencev v Bistrenici danes niso ne Srbi ne Slovenci, ne katoličani in ne pravoslavci, pa tudi ne italijanski in naši državljani.«

S tema dvema člankoma pa se (znano) časopisno poročanje tudi konča. In kar sledi, je le še ...

ZAKLJUČEK

Pisanje nekakšne »zgodovine idej v praksi« – ko se iz sterilnih višav spustijo na umažana tla vsakdana, kjer morajo sklepati takšna in drugačna zaveznitva z različnimi pojavi, dogodki in drugimi elementi historične stvarnosti – je v prvi vrsti deskriptivno in interpretativno početje. A kaj nam sploh lahko prinese to deskriptivno in interpretativno početje? Pomaga nam razumeti, kako so si v določenem času predstavljali družbeno realnost oziroma neki družbeni pojav in kako so ideje delovale v vsakdanji praksi. Kako so v našem primeru pisci časopisnih besedil, ki jih lahko v veliki meri razumemo kot nekakšne posrednike idej oziroma realizatorje idejnega v svet(u) časopisja, razumeli svet, v katerem so živeli, in kako so ga posredovali drugim (o vlogi in pomenu časnikarjev in piscev glej Amon 1996).

Slovenska kolonija v makedonski Bistrenici ni bila pomembna politična, družbena in tudi ne časopisna tema. Bila je relativno zelo minoren pojav, ki se je redko znašel na časopisnih straneh in ki praviloma ni aktiviral večjih ideoloških bojov in trenj. A vendarle je mogoče opaziti nekatera razhajanja, ki kažejo na to, kako je bila neka družbena stvarnost oziroma pojav posredovan beroči javnosti, kako in kaj se je o tem pisalo in o čem se ni pisalo. Govorimo o času, ko je bilo narodno vprašanje eno osrednjih vprašanj slovenske politike in kulture, kar se je odražalo tudi v pisanju ideološko polariziranega časopisja o slovenskih kolonialistih v Bistrenici. Čeprav je bilo to

vprašanje le redko jasno artikulirano preneseno na časopisni papir, se zdi, da je bilo gibalo pri pisanju o slovenski koloniji v Bistrenici. Liberalnemu taboru naklonjeno časopisje, ki je vztrajalo pri jugoslovanstvu in centralizmu, je o naseljevanju in koloniji pisalo večinoma naklonjeno, katoliškemu taboru naklonjeno časopisje, ki je zagovarjalo avtonomistično stališče in je v kulturnem boju nastopalo proti jugoslovanstvu, pa je bilo do naseljevanja in kolonije bolj zadržano ali mu je bilo celo nenaklonjeno. Zarisana razlika ni vseobsegajoča, pogosto ni jasna in jo je treba brati previdno in z distanco (cf. Nežmah 2013).

Trideseta leta 20. stoletja so bila namreč pri realiziranju idej v časopisno stvarnost posebna leta. Tradicionalna slovenska delitev na katoliški in liberalni tabor ni več omogočala izražanja novih političnih in svetovnonazorskih stališč, zato so se v tridesetih letih pojavili novi časopisi, okrog katerih so se organizirala politična in ideološka gibanja (Mikuž 1965: 422; Amon 1996: 151). Čeprav je večina člankov o slovenski koloniji v Bistrenici iz osrednjih slovenskih dnevnikov (*Slovenca*, *Jutra*, *Slovenskega naroda*), so o njej pisali tudi članki v časopisih novih političnih in ideoloških gibanj (*Pohod*, delno *Jugoslovan* in *Slovenski dom*). In prav ti prinašajo najbolj svojevrstno, angažirano in opredeljeno pisanje o slovenski vasi daleč na jugu države.

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SUMMARY

“NOT SERBS, NOT SLOVENES, NOT CATHOLICS OR ORTHODOX, NOT EVEN ITALIAN AND OUR CITIZENS”: HOW THE SLOVENIAN NEWSPAPERS REPORTED ON THE SLOVENIAN COLONY IN BISTRENICA (MACEDONIA) 1930–1940

Jernej MLEKUŽ

In the text, the author analyzes and answers how the Slovenian newspapers between 1930 and 1940 described the Slovenian colony in Macedonian Bistrenica. This south-Yugoslav colony, formed at the start of the 1930s on the initiative of the influential advocate Ivan Marija Čok, was not an important subject matter, neither politically nor socially nor journalistically. A relatively minor occurrence in newspapers, very rarely found in their pages, it generally never set off any intense ideological conflicts or disagreements in the otherwise ideologically quite heated period of the 1930s. Regardless, it is possible to see some discrepancies that show how particular social phenomena were presented to the reader, how and what was written, and what was left out. In this period, the national question stood at the center of Slovenian politics and culture. This question is also visible in the concurrent ideologically-torn newspapers that were writing about the Slovenian colonialists in Bistrenica. Although the subject of the Slovenian nation had only rarely ever been directly mentioned in the press, it seems that it was the primary motivation behind the writing on the Bistrenica colony. The liberal press, steadfast in their support of centralism and Yugoslavdom, mostly wrote positively about immigration and the colony. Conversely, the press on the side of the Catholic camp, writing in favor of the autonomic stance and speaking out against Yugoslavdom in this cultural war, remained lukewarm or even unsupportive of emigration and the colony. The differences outlined are not always applicable; they often stay blurred and thus need to be taken with caution and reservation.

The 1930s were a unique decade concerning the realization of these ideas in the pages of newspapers. The traditional Slovenian classification between the Catholic and liberal camps no longer proved adequate when describing the newer political and world views. For this reason, several other newspapers that became the center of political and ideological movements began to appear in the 1930s. Although the majority of articles on the Slovenian colony in Bistrenica come from the older, central Slovenian journals (*Slovenec*, *Jutro*, *Slovenski narod*), there were also articles from newspapers belonging to these “newer” political and ideological movements (*Pohod*, partly also *Jugoslovan* and *Slovenski dom*). Precisely the latter offers the most unique, socially engaged, and identified writing on the colony.

STALIŠČA (BODOČIH) PEDAGOŠKIH DELAVCEV KOT TEMELJ KAKOVOSTNEGA VKLJUČEVANJA OTROK PRISELJENCEV

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COBISS 1.01

IZVLEČEK

Stališča (bodočih) pedagoških delavcev kot temelj kakovostnega vključevanja otrok priseljencev

Glede na sodobne dokumente in smernice tako na nacionalni kot na ravni EU je treba razmišljati o udejanjanju koncepta inkluzivnosti kot transformacije šolskega sistema, ki vključuje tudi načelo medkulturnosti. Prispevek analizira stališča (bodočih) pedagoških delavcev do načinov vključevanja otrok priseljencev v šolski sistem. V raziskavi so študenti (n = 411) izražali manj negativna stališča do otrok priseljencev ter bolj pozitivna stališča do kulturne raznolikosti in pomoči otrokom priseljencem kot pedagoški delavci (n = 763). V članku so predstavljeni nekateri razlogi za dobljene ugotovitve in možnosti vplivanja na spremembo nekonstruktivnih stališč strokovnih delavcev v šolstvu.

KLJUČNE BESEDE: stališča, medkulturnost, otroci priseljenci, inkluzivnost

ABSTRACT

Attitudes of (Future) Educational Staff as a Basis for Quality Inclusion of Immigrant Children

Contemporary documents and guidelines, at both the national and EU levels, emphasize the importance of implementing the concept of inclusiveness, which also involves the principle of interculturalism. This paper provides insights into the attitudes of present and future teaching staff and towards intercultural education. The sample included 763 professional teachers and 411 students. Students expressed less negative attitudes toward immigrant children and more positive attitudes toward cultural diversity and helping immigrant children. The reasons for the negative attitudes and possible ways of promoting a change in the attitudes of the professional educational staff are discussed.

KEYWORDS: attitudes, intercultural education, immigrant children, inclusiveness

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UVOD

V Sloveniji sta se od osamosvojitve do danes priseljevanje in izseljevanje povečala za najmanj trikrat, povečala pa se je tudi raznolikost priseljencev (SURs 2019). V šolskem letu 2018/19 je bilo v osnovno šolo vpisanih približno 10.000 učencev, v vrtec pa 4.000 otrok, ki nimajo slovenskega državljanstva (prav tam). Večina teh otrok ne razume slovenskega jezika in zato težko sledi vrtčevskemu oz. šolskemu vsakdanu. Od pedagoških delavcev se pričakujejo dobro razvite veščine oz. zmožnosti prilaganja vzgojno-izobraževalnega (nadalje VI) dela otrokom priseljencem ter povezovanja in gradnje (razrednih) skupnosti, ki temeljijo na skupnih sodobnih civilizacijskih vrednotah. Da te zmožnosti (bodoči) pedagoški delavci lahko razvijejo, je najprej treba okrepiti njihova pozitivna stališča do različnosti in zrahljati predsodke.

Predsodki so stališča z izrazito (praviloma negativno) čustveno valenco. Kažejo se v nespoštljivem, netolerantnem ali prezirljivem odnosu npr. do pripadnikov drugih narodov, etničnih skupnosti, kultur, oseb z drugačnimi načini življenja ter religioznimi in spolnimi usmeritvami (Ule 2005). Od leta 2015 se v Sloveniji predsodki krepijo predvsem do muslimanov in beguncev (Vižintin 2017). V raziskavah na reprezentativnih vzorcih osnovnošolskih učiteljev se kaže ambivalenten odnos do poučevanja učencev iz drugih držav (Lesar 2007; Valenčič Zuljan idr. 2011).

Globalizacija, težnje po mednarodnem sodelovanju in povečano število selitev prinašajo družbene spremembe in zahteve po razvijanju zmožnosti spoštljivega sobivanja v večkulturni družbi. V Sloveniji šolski sistem žal še ne ponuja celovite podpore pri vključevanju otrok priseljencev v VI-zavode niti strokovnim delavcem v vzgoji in izobraževanju niti otrokom in njihovim staršem, ki so se priselili v Slovenijo.

Pedagoški delavci razpeti med formalno-strokovnimi zahtevami: Načelo inkluzivnosti vs. medkulturnosti

Največji del odgovornosti za navajanje na spoštljivo sobivanje v večkulturni družbi bi moral prevzemati VI-sistem oz. pedagoški delavci, saj gre za edini družbeni sistem, ki zaradi šoloobveznosti združuje vse otroke in mladostnike. Le v njem se odraščajoči lahko neposredno srečujejo s pripadniki različnih kultur, česar družine same ne zagotavljajo. Pedagoški delavci bi zato morali znati sprejemati in vzgajati spoštljivo sobivanje v raznolikosti, obenem pa skrbeti za pravično izobraževanje vseh udeleženi v procesu šolanja (ZOFVI 2017). V slovenskem VI-sistemu se na načelni ravni za delo z različnimi otroki in mladostniki omenja ideja inkluzije (npr. *Bela knjiga* 2011), pa vendar se na nacionalni ravni koncept še ni oblikoval.

Inkluzivnost je osrednji pojem tako v profesionalnem diskurzu kot tudi v splošni javnosti, med oblikovalci politik in starši (Zgaga 2019), čeprav so v njihovem pojmovanju zelo velike razlike (Lesar 2019). Koncept inkluzivnosti kot transformacije šolskega sistema (Opertti, Walker, Zhang 2014) zahteva upoštevanje vseh učencev – ne le tistih z različnimi primanjkljaji, motnjami in nezmožnostmi, ki se jih sicer v razpravah

o inkluzivnosti pri nas najpogosteje omenja – zlasti moramo imeti pred očmi vse tiste, ki so iz kateregakoli razloga družbeno marginalizirani in izključeni tudi v samem VI-procesu (Lesar 2019). V takšno pojmovanje inkluzivnosti lahko umestimo tudi načelo medkulturnosti v vzgoji in izobraževanju, katere temelji so odnos, sodelovanje in izmenjava, temelječi na odprtosti, sprejemanju in spoštovanju. Tudi v razvoju modelov medkulturnega izobraževanja (Seeberg idr. 1998, po Skubic Ermenc 2003: 104–106) je mogoče zaslediti t. i. inkluzivno multikulturno izobraževanje, ki promovira vrednost in moč kulturne raznolikosti ter človekovih pravic in spoštovanja tistih, ki so prepoznani kot drugačni. Čeprav je medkulturnost kot pojem oz. načelo rezervirana za pedagoško delo s pripadniki manjšinskih etničnih skupin, je model, ki se aktivno zavzema za odpravljanje zatiranja in nepravičnega družbenega *statusa quo*, namenjen vsem učencem.

V Sloveniji neposredna pedagoška praksa ureditev podpornih mehanizmov pri vključevanju otrok priseljencev pričakuje na sistemski ravni. Eden od pogojev za inkluzivno šolo je ustrezno izobražen in usposobljen pedagoški kader, ki ima do specifičnosti posameznikov pozitivna stališča in dovolj ustrezno širino metodično-didaktičnih znanj, da se zmore na te specifičnosti konstruktivno odzivati.

Stališča pedagoških delavcev kot pogoj udejanjanja medkulturnosti

Obstoječi modeli medkulturne vzgoje in izobraževanja v Sloveniji (npr. Sinjur 2016; Vižintin 2017) med drugim poudarjajo pomen ustrezno usposobljenih učiteljev oz. učiteljev z medkulturno zmožnostjo. Ključni so kakovostno izobraževanje in stališča, ki vplivajo na učiteljevo vedenje v razredu (Lesar 2007; Peček, Ermenc 2016; Mažgon, Jeznik, Ermenc 2018). Stališča predstavljajo pripravljenost posameznika za določeno ravnanje in usmerjajo njegove odnose in ravnanje v konkretnih učno-vzgojnih situacijah in so še zlasti pomembna pri odločanju, katero metodo ali postopek uporabiti, kadar postopki niso predpisani ali rutinski (Razdevšek Pučko 1990). Stališča učitelju omogočajo, da se v nestrukturiranih situacijah lažje znajde ter da pojave in dogodke kategorizira, čeprav jih ne pozna dobro; še več, čeprav o določeni stvari vemo zelo malo, smo lahko do nje zelo močno čustveno opredeljeni in pripravljeni za akcijo (Vižintin 2017).

V metaanalizi raziskav o dejavnikih, ki vplivajo na uveljavljanje inkluzivnosti v šolah, so ugotovili, da so učiteljeva (in ravnateljeva) stališča in vrednote celo bolj pomembna od (specialno) didaktično-metodične usposobljenosti (Dyson, Howes, Roberts 2002). Sonia Nieto (2013) ugotavlja, da se učitelji kljub boljši metodično-didaktični usposobljenosti še vedno ne čutijo pripravljene poučevati drugačnih učencev. Poznavanje raznolikih metod in oblik dela še ne zagotavlja ustreznega odzivanja na učenca, neučinkovitost določenih metod pri učencih pa učitelji neredko pripisujejo »problematičnemu« učencu in ne metodi sami oz. smiselnosti uporabljene metode v konkretnem kontekstu.

Ob tem se sprašujemo o uspešnosti spreminjanja bolj ali manj togih predstav o poučevanju in vzgajanju, ki so jih študenti, bodoči pedagoški delavci, pridobili med šolanjem, pa z vidika udejanjanja načel inkluzivnosti in medkulturnosti niso najbolj konstruktivne. Ustrezna zakonodaja in pravična ureditev na sistemski ravni, ki spodbujata inkluzivno naravnost, še ne zagotavljata premikov na individualni ravni. Ta vidik je treba v izobraževanju bodočih učiteljev bolj jasno poudarjati oz. se zavedati (ne)moči trenutno uveljavljenih načinov usposabljanja pri ozaveščanju in spreminjanju prevzetih stališč in predsodkov ter iskati učinkovitejše (Lesar 2007; Peček, Ermenc 2016).

Ni dovolj le, da se v študijskem procesu spreminjajo stališča, nujno je ta stališča utrjevati tudi z lastnimi izkušnjami in s pozitivnimi izkušnjami ob učiteljih mentorjih. Kot zlasti kritično Cveta Razdevšek Pučko poudari prav začetno obdobje poučevanja, ko se stališča učitelja začetnika največkrat ne skladajo ne z vedenjem večine učiteljev ne z njegovim lastnim, zato:

[...] mora pogosto reagirati drugače, predvsem manj demokratično, kot si je predstavljal ali kot naj bi po naučenih stališčih. V stanju kognitivnega konflikta, ko je njegovo vedenje disonantno s stališči, se odloča za pot, ki je najlažja: spremeni stališča, ki so tudi še dokaj šibka, zato ta sprememba ni posebej težka. Pri tej spremembi (v bistvu gre za nazadovanje) stališč ga okolje podpira, saj prevzema stališča, ki v skupini (v zbornici) prevladujejo. S to spremembo si tudi olajša vstop (sprejetje) v skupino. [...] Sprejemanje stališč referenčne skupine je v interakciji s procesom poistovetenja, ta olajša in pospeši oblikovanje ali spremembo stališč, ki imajo obenem tudi pomen skupinskih norm. Na drugi strani pa sprejetje stališč, ki so značilnost skupine, utrdi proces poistovetenja s skupino. (Razdevšek Pučko 1990: 27)

Iz tega razmišljanja lahko sklepamo, da bi za učinkovitejše spreminjanje stališč študentov morali pozornost nameniti tudi zaposlenim v VI-zavodih, kjer poteka pedagoška praksa, in premisliti o programih stalnega strokovnega izpopolnjevanja, ki bi bili namenjeni celotnemu kolektivu in ne samo tistim, ki bi se zanj odločili.

V študijskem procesu stroka ne sugerira zgolj poznavanja relevantnih pedagoških teorij in od družbe odvisnega položaja marginaliziranih skupin, marveč omogočanje in izvajanje procesov (npr. spremljanje konkretnih posameznikov v njihovem življenjskem kontekstu), ki bodo (bodoče) pedagoške delavce ob pomoči univerzitetnih profesorjev in asistentov usmerili v razmislek o lastnih prepričanjih, morebitnih predsodkih in diskriminirajoči praksi (npr. Peček, Ermenc 2016; Mažgon, Jeznik, Ermenc 2018; Lesar, Žveglič Mihelič 2019). V nasprotnem primeru lahko nevede zaidemo v liberalni ali pluralistični multikulturalizem (Lukšič Hacin 1999) ali pa v nedosledne koncepte in ideje. To lahko pripelje do občutka, da je vsaka situacija, ki vključuje priseljence, »medkulturna«, še zlasti, če gre za »modni« družbeni trend skupin ali posameznikov, da je vključevanje priseljencev obvladljivo zgolj s ponujenimi metodami in recepti (Portera 2011).

Poleg stroke in raziskovalcev pa slabšo usposobljenost na tem področju zaznavajo tudi učitelji sami. V raziskavi (Čančar, Drljič 2015) je v vzorcu 144 učiteljev slovenskih šol 76 odstotkov učiteljev poročalo, da se med študijem niso srečali z vsebinami, ki bi se nanašale na delo z učenci priseljenci, 57 odstotkov pa je poročalo, da vsebin medkulturne vzgoje in izobraževanja ne poznajo oz. jih poznajo slabo. To lahko podkrepimo z ugotovitvami, da le dobri dve petini pedagoških delavcev na univerzitetni ravni v svoje predmete vključuje teme o marginaliziranih družbenih skupinah. Med različnimi študijskimi smermi so velike razlike, saj te vsebine v programe za učitelje vključuje manj kot tretjina (29,6 odstotka) univerzitetnih pedagoških delavcev, v programih za predšolsko vzgojo dobra polovica (55 odstotkov), v programih za bodoče svetovalne delavce pa skoraj tri četrtine (71,4 odstotka) (Lesar, Žvegljč Mihelič 2019). Andreja Sinjur (2016) v svoji doktorski raziskavi ugotavlja, da se strokovni delavci tudi redko udeležijo izobraževanj na temo vključevanja otrok priseljencev, v več kot četrtini šol se takega seminarja, usposabljanja ali izpopolnjevanja še nikoli niso udeležili.

Ob zavedanju, da je treba pedagoške delavce v vzgoji in izobraževanju za medkulturnost posebej usposobiti, in sicer zlasti med študijem, se v pričujoči raziskavi sprašujemo, kakšna so trenutna stališča do vzgoje in izobraževanja učencev priseljencev tako pri študentih pedagoških smeri kot tudi pri pedagoških delavcih v VI-zavodih. Zanima nas, ali so med njimi razlike in na katerih področjih bo treba v procesu izobraževanja in usposabljanja kadrov vsebine prestrukturirati oz. dopolniti. Dejstvo je, da potrebujemo kadre s pozitivnimi stališči do drugačnosti, z lastno medkulturno zmožnostjo oz. zmožnostjo inkluzivnega delovanja; v nasprotnem primeru te pri otrocih ne morejo razviti.

METODA

V okviru evalvacijske študije projekta SIMS »Razvijamo medkulturnost kot novo obliko sobivanja«, ki si prizadeva za umestitev medkulturnosti v slovenske šole in vrtce ter ustvarja mehanizme za podporo vključevanja učencev priseljencev v slovenski VI-sistem, smo (bodočim) pedagoškim delavcem v anketi postavili tri sklope vprašanj in lestvic. Z njimi smo želeli opredeliti: a) stališča v zvezi z inkluzivnim poučevanjem in s kulturno raznolikostjo v VI- in lokalnih skupnostih; b) kompetence za inkluzivno poučevanje in krepitev vrednot medkulturnosti; c) različne osebne značilnosti anketiranih (med njimi tudi demografske podatke) in pedagoške izkušnje s priseljenimi. V tem prispevku pozornost namenjamo sklopoma a in c.

Vprašalnik

Pri razvoju Lestvice stališč v zvezi z inkluzivnim poučevanjem in s kulturno raznolikostjo v VI- in lokalnih skupnostih (v nadaljevanju Lestvica stališč) smo izhajali iz vsebine nekaterih tujih pripomočkov (glej npr. Danso, Sedlovskaya, Suanda 2007; Varela

idr. 2013). Končna verzija razvite lestvice je vključevala 35 postavk. Udeleženci so na 5-stopenjski Likertovi lestvici (1 – sploh se ne strinjam, 5 – povsem se strinjam) odgovarjali, kako zelo se strinjajo s posamezno trditvijo. Lestvici stališč smo pri strokovnih delavcih dodali nekaj vprašanj o značilnostih zaposlitve: število let delovne dobe v vzgoji in izobraževanju, kje in kaj poučujejo, vključenost šole v projekt SIMS, izkušnje s poučevanjem otrok priseljencev, poznavanje in upoštevanje dokumentov, ki se nanašajo na VI-delo z otroki priseljenci, pri samem delu z otroki priseljenci. Študente pa smo povprašali o: stopnji, letniku in smeri študija, številu ur strnjene praktičnega usposabljanja (t. i. študijske prakse) v VI-zavodih, morebitnih izkušnjah in obsegu dela (v urah) z otroki priseljenci.

Postopek

Zaposleni pedagoški delavci v VI-zavodih, tj. vrtcih, osnovnih in srednjih šolah, in multiplikatorji (v nadaljevanju strokovni delavci) so anketo med aprilom in junijem 2018 izpolnjevali v spletni obliki in anonimno, študenti pedagoških študijskih smeri pa med februarjem in junijem 2019.

Vzorca

Anketo je vsaj delno izpolnilo 763 strokovnih delavcev. Med njimi jih je bilo 64,9 odstotka zaposlenih v osnovni šoli (nadalje OŠ), 8,8 odstotka v srednji šoli (nadalje SŠ) in 26,3 odstotka v vrtcu. Po Hubermanovem modelu profesionalnega razvoja (Javrh 2011) je bila različna tudi njihova delovna doba: 8,1 odstotka jih je delalo med 0 in 3 leti, 6,9 odstotka med 4 in 6 let, 34,9 odstotka med 7 in 18 let, 26,6 odstotka med 19 in 30 let ter 23,5 odstotka več kot 30 let.

Vprašalnik so izpolnili učitelji (slovenščine in tujih) jezikov (13,3 odstotka), naravoslovnih predmetov in matematike (11 odstotkov), umetniških predmetov in športa (5,5 odstotka), družboslovnih predmetov (5,2 odstotka), strokovnih predmetov (3,3 odstotka) in drugi učitelji (24,9 odstotka), vzgojiteljice (10,9 odstotka), pomočnice vzgojiteljic (5,2 odstotka), vodstveni delavci v vrtcu (3 odstotki), zaposleni v svetovalnih službah v vrtcu (0,4 odstotka) in drugi delavci v vrtcu (0,5 odstotka).

V dejavnosti projekta SIMS je bilo vključenih 24 VI-zavodov: dva vrtca, 18 OŠ in štiri SŠ. V vzorcu je 61 odstotkov strokovnih delavcev iz vrtca poročalo, da je bil njihov vrtec vključen v projekt SIMS, 29 odstotkov, da njihov vrtec ni bil vključen v projekt, deset odstotkov pa jih ni vedelo, ali je bil njihov vrtec vključen v projekt ali ne. Večina osnovnošolskih (78 odstotkov) in srednješolskih učiteljev (75 odstotkov) je poročala, da je bila njihova šola vključena v projekt SIMS. Okoli desetina (10 odstotkov OŠ učiteljev in 8 odstotkov SŠ učiteljev) jih je poročalo, da ne, preostali (12 odstotkov OŠ učiteljev in 18 odstotkov SŠ učiteljev) pa tega niso vedeli.

Strokovne delavce v vrtcih, OŠ in SŠ smo primerjali po nekaterih spremenljivkah. V Tabeli 1 so prikazane frekvenčne porazdelitve izkušenj z delom z otroki priseljenci.

Izvedeni hi-kvadrat testi so pokazali, da so se primerjane skupine udeležencev med seboj statistično značilno razlikovale v količini izkušenj z delom s priseljenci – izstopala je nižja količina izkušenj z delom s priseljenci v vrtcih v primerjavi z drugima dvema skupinama udeležencev – in v upoštevanju *Smernic za izobraževanje otrok tujcev v vrtcih in šolah* (ZRSS 2012) – izstopal je višji delež upoštevanja smernic v OŠ v primerjavi z vrtcem in s SŠ. Večina udeležencev iz OŠ in SŠ je poročala, da prilagaja načine ocenjevanja učencem priseljencem. Približno polovica udeležencev iz OŠ in SŠ je poročala, da učence priseljence, ki so prvo leto v slovenski šoli, ob koncu šolskega leta oceni.

Tabela 1: Primerjava udeležencev, zaposlenih v vrtcu, OŠ in SŠ

Spremenljivka	Vrtec (n = 201)		OŠ (n = 495)		SŠ (n = 67)		Statistični test razlik med skupinami
	f	%	f	%	f	%	
Izkušnje z delom z otroki priseljenci							
nikoli	45	22	82	17	5	8	$\chi^2(6) = 21,54, p = ,001$
enkrat	23	11	45	9	4	6	
2- do 10-krat	97	48	211	43	33	49	
11- ali večkrat	36	18	157	32	25	37	
Upoštevanje smernic							
da	96	62	331	80	39	63	$\chi^2(4) = 28,15, p < ,001$
ne, čeprav jih pozna	10	6	8	2	5	8	
ne, jih ne pozna	50	32	73	18	18	29	
Prilagajanje načinov ocenjevanja							
da	--	--	397	96	58	94	Fisherjev eksaktni test $p = ,294^a$
ne	--	--	15	4	4	6	
Ocenjevanje ob koncu šolskega leta							
da	--	--	205	50	29	47	$\chi^2(1) = 0,09, p = ,763$
ne	--	--	207	50	33	53	

Opombe: Navedeni odstotki se nanašajo na število udeležencev znotraj posamezne skupine, ki so odgovorili na zastavljeno vprašanje.

^aKer so bile v več kot 20 odstotkih polj kontingenčne tabele pričakovane frekvence nižje od 5, smo izvedli Fisherjev eksaktni test namesto hi-kvadrat testa.

Anketo je vsaj delno izpolnilo 411 študentov, od tega 159 (39 odstotkov) s Filozofske fakultete, 33 (8 odstotkov) s Fakultete za socialno delo in 160 (39 odstotkov) s Pedagoške fakultete Univerze v Ljubljani, 34 (8 odstotkov) s Filozofske fakultete in 1 s Pedagoške fakultete Univerze v Mariboru ter 13 (3 odstotki) s FAMNIT, 3 (1 odstotek) s Fakultete za humanistične študije in 8 (2 odstotka) s Pedagoške fakultete Univerze na Primorskem. Večina je bila rednih študentov ($n = 403$), 258 (63 odstotkov) jih je študiralo na 1. stopnji, 151 (37 odstotkov) na drugi, dva pa sta bila študenta tretje stopnje.

Na vprašanje, koliko ur strnjenege praktičnega usposabljanja (študijske prakse) v VI-zavodih so že med študijem opravili v programu, na katerega so bili vpisani v času izpolnjevanja ankete, so 403 udeleženci v povprečju zapisali 187 ur (5-odstotna prirezana sredina = 46 ur, *Mdn* = 35 ur; 219 jih je zapisalo manj kot 40 ur, 93 med 41 in 80 urami, 91 pa več kot 80 ur).

Med udeleženci je imelo 156 (38 odstotkov) študentov že izkušnje z delom z otroki priseljenci, 255 (62 odstotkov) pa še ne. Prvi so v povprečju zapisali, da so z njimi delali 125 ur (prirezana sredina = 37 ur, *Mdn* = 25 ur; 105 jih je poročalo, da so z otroki priseljenci neposredno delali 40 ali manj ur in 50 več kot 40 ur).

Na koncu vprašalnika je med 87 študenti, ki so odgovarjali na vprašanje, ali so tudi sami priseljeni v Slovenijo, sedem študentov odgovorilo pritrdilo. Na vprašanje, ali so njihovi starši/skrbniki priseljeni v Slovenijo, jih je pritrdilno odgovorilo 14 od 91. Na vprašanje, ali imajo izkušnjo z daljšim bivanjem v tuji državi (več kot tri mesece, npr. AuPair, Erasmus), je pritrdilno odgovorilo 22 študentov od 92.

Na posamezne dele ankete in vprašanja je odgovorilo različno število udeležencev, zato je v nadaljevanju ponekod pri analizah *numerus* različen.

REZULTATI

Struktura uporabljene lestvice stališč v zvezi z inkluzivnim poučevanjem in s kulturno raznolikostjo v vzgojno-izobraževalnih in lokalnih skupnostih

Strukturo lestvice stališč smo pri podatkih, zbranih pri strokovnih delavcih, preiskali z eksploratorno faktorsko analizo, ki smo jo izvedli s statističnim orodjem R in paketom *psych* (Revelle 2019) s funkcijo *fa*. Na polihoričnih korelacijah, izračunanih na parno nemanjkajočih podatkih, smo po metodi minimalnih rezidualov (MINRES), ki ne predpostavlja normalne porazdelitve spremenljivk, z uporabo poševnokotne *oblmin* rotacije izločili štiri faktorje, ki so pojasnjevali 41-odstotne variance postavk, $RMSR = 0,04$, $RMSEA = 0,062$ (90-odstotni interval zaupanja za $RMSEA = 0,056-0,065$). Nekaj postavk, ki so bile nizko nasičene z izločenimi faktorji ali so bile nasičene z več faktorji, smo iz nadaljnjih analiz izločili. Natančnejši opis analize podatkov in dobljenih nasičenosti postavk s štirimi faktorji je prikazan v Poročilu o evalvaciji (Kocbek 2018). Pri podobno izvedeni analizi podatkov študentov smo ugotovili, da bi tudi strukturo podatkov študentov smiselno pojasnjevali enaki štirje faktorji.

Prvi faktor (F1) je nasičal deset postavk, ki izražajo negativno stališče do otrok oz. učencev priseljencev in prepričanje, da je delo z njimi težko, da se jim posveča preveč pozornosti, da bi se morali prilagoditi slovenskemu okolju ter govoriti slovenski jezik in sprejeti slovensko kulturo. (Primer postavke: »V šolah, kjer je preveč otrok priseljencev, je kakovost izobraževanja slabša.«) Faktor smo poimenovali negativna stališča do otrok priseljencev. Drugi faktor (F2) je vključeval osem postavk, ki izražajo naklonjenost priseljencem, pozitiven odnos do kulturne raznolikosti ter sprejemanje

izvirne kulture in maternega jezika priseljencev. (Primer postavke: »Kulturna raznolikost je pozitivna sila v razvoju slovenske družbe.«) Faktor smo poimenovali pozitivna stališča do kulturne raznolikosti. Tretji faktor (F3) je nasičal pet postavk, ki govorijo o enakih možnostih otrok in vzgoji otrok za spoštovanje sebe in drugih. (Primer postavke: »Otroci morajo imeti priložnost, da se naučijo spoštovati ljudi, ki so drugačni od njih.«) Faktor smo poimenovali pozitiven odnos do vzgoje odprtosti. Četrty faktor (F4) je nasičal štiri postavke, ki govorijo o podpori in pomoči otrokom priseljencem pri vključevanju v skupino in slovensko družbo. (Primer postavke: »Storiti moramo vse, kar lahko, da bi se priseljenci vključili v slovensko družbo.«) Faktor smo poimenovali pozitivna stališča do pomoči priseljencem.

V nadaljevanju smo dosežek udeležencev (tako strokovnih delavcev kot tudi študentov) na posamezni stališčni podlestvici izračunali kot povprečno vrednost odgovorov udeležencev na postavke podlestvice. Pregledali smo, kako so bili dosežki na štirih stališčnih podlestvicah povezani z različnimi drugimi spremenljivkami, ki smo jih spremljali. Ker so bile porazdelitve dosežkov na lestvici stališč izrazito asimetrične tudi v posameznih skupinah udeležencev, smo pri vseh primerjavah skupin izvedli neparametrične teste. Hipoteze smo testirali pri petodstotni ravni alfa napake. Za primerjavo sredin dveh skupin smo uporabili Wilcoxonov test vsote rangov. Za primerjavo sredin več kot dveh skupin smo uporabili Kruskal-Wallisov H test in v primeru statistično pomembne razlike med skupinami še *post hoc* test multiplih parnih primerjav, Dunnov test iz R paketa *dunn.test* (Dinno 2017) z uporabo Holm-Šidákovega popravka, ki nadzoruje skupno raven alfa napake. V nadaljevanju prikazujemo rezultate različnih primerjav. Ker smo na osnovi analize zanesljivosti ugotovili, da sta imela dosežka na F3 in F4 pri študentih nezadovoljivo zanesljivost (Cronbachova koeficienta alfa sta znašala ,57 in ,58), moramo rezultate analiz, povezane z njimi, interpretirati z rezervo.

Primerjava dosežkov na stališčnih lestvicah med različnimi skupinami udeležencev

Najprej smo se osredotočili na primerjavo stališčnih dosežkov v štirih skupinah udeležencev: strokovnih delavcih v vrtcu, v OŠ, v SŠ in pri študentih. V Tabeli 2 so navedene opisne statistike lestvičnih dosežkov v štirih skupinah udeležencev, rezultati Kruskal-Wallisovega testa in tiste parne razlike med skupinami, ki so se izkazale za statistično značilne. Nevtralen odnos označuje vrednost 3 na odgovorni lestvici 1–5. Udeleženci v našem vzorcu so v povprečju na lestvici F1, ki meri negativna stališča do otrok priseljencev, dosegali vrednost 2,5. Rezultati kažejo tudi njihov razmeroma zadržan odnos do kulturne raznolikosti, saj so na lestvici F2 v povprečju dosegali vrednost 3,75. Nekoliko višje so bile sredine dosežkov na lestvici F4, ki meri pozitivna stališča do pomoči priseljencem. Nasprotno pa so udeleženci v splošnem poročali o zelo pozitivnem odnosu do vzgoje odprtosti (F3).

V Tabeli 2 vidimo, da so se skupine udeležencev statistično značilno razlikovale v vseh dosežkih, razen dosežkih na lestvici F3 – Pozitiven odnos do vzgoje odprtosti. Študenti so izražali manj negativna stališča do otrok priseljencev ter bolj pozitivna stališča do kulturne raznolikosti kot preostale tri skupine. Izražali so tudi bolj pozitivna stališča do pomoči priseljencem kot strokovni delavci v vrtcih in srednjih šolah. Primerjava med skupinami strokovnih delavcev je pokazala, da so zaposleni v SŠ poročali o bolj negativnih stališčih do otrok priseljencev in manj pozitivnih stališčih do kulturne raznolikosti kot zaposleni v vrtcu in OŠ. Zaposleni v vrtcu so poročali o manj pozitivnih stališčih do pomoči priseljencem kot zaposleni v OŠ.

Tabela 2: Primerjava median dosežkov (in MAD v oklepajih) na lestvicah stališč pri strokovnih delavcih v vrtcu, osnovni in srednji šoli ter študentih

Lestvica	Strokovni delavci v vrtcu (n = 102)	Strokovni delavci v OŠ (n = 335)	Strokovni delavci v SŠ (n = 49)	Študenti (n = 376)	Rezultat statističnih testov
F1	2,50 (0,59)	2,40 (0,59)	3,00 (0,74)	2,30 (0,59)	$\chi^2(3) = 46,76, p < ,001$; SŠ > (V, OŠ) > Š
F2	3,62 (0,74)	3,75 (0,74)	3,50 (0,56)	4,00 (0,64)	$\chi^2(3) = 28,98, p < ,001$; SŠ < (OŠ, V) < Š
F3	5,00 (0,00)	5,00 (0,00)	5,00 (0,00)	5,00 (0,00)	$\chi^2(3) = 4,34, p = ,230$
F4	4,00 (0,74)	4,25 (0,74)	4,00 (0,74)	4,42 (0,49)	$\chi^2(3) = 19,87, p < ,001$; (V, SŠ) < Š; V < OŠ

Opombe: n = število udeležencev, ki so izpolnili lestvico stališč, MAD = povprečni absolutni odklon od mediane, pomnožen z 1,4826. F1 = negativna stališča do otrok priseljencev, F2 = pozitivna stališča do kulturne raznolikosti, F3 = pozitiven odnos do vzgoje odprtosti, F4 = pozitivna stališča do pomoči priseljencem. V = strokovni delavci v vrtcu, OŠ = strokovni delavci v osnovni šoli, SŠ = strokovni delavci v srednji šoli, Š = študenti.

Povezanost stališčnih dosežkov z drugimi spremenljivkami pri strokovnih delavcih

Pri udeležencih iz vrtca smo pregledali povezave dosežkov na lestvicah stališč z doseženo izobrazbo zaposlenih, s starostnim obdobjem, s katerim delajo, in delovnim mestom, na katerem so zaposleni. Razlike v stališčih smo izsledili le pri F1 – negativna stališča do otrok priseljencev, in le glede na delovno mesto, $\chi^2(2) = 6,73, p = ,034$. Parne primerjave skupin so pokazale, da so vzgojiteljice poročale o bolj negativnih stališčih do otrok priseljencev ($Mdn = 2,60, MAD = 0,59$) kot vodstveni delavci ($Mdn = 2,10, MAD = 0,59$).

Pri zaposlenih v OŠ smo primerjali dosežke na lestvicah stališč pri učiteljih, ki delajo z otroki v različnih triadah, vendar nismo izsledili statistično značilnih razlik. Zaposleni v različnih srednješolskih programih (srednjem poklicnem in srednjem strokovnem izobraževanju ter gimnaziji) se v stališčih niso statistično značilno razlikovali.

Pri združeni skupini učiteljev, ki poučujejo v OŠ ali SŠ, smo pregledali, kako se stališčni dosežki razlikujejo glede na uporabo prilagajanja načinov ocenjevanja. Učitelji, ki priseljencem prilagodijo načine ocenjevanja, in tisti, ki načinov ocenjevanja ne prilagodijo, se niso razlikovali v stališčih, niti ni bilo razlik med učitelji, ki otroka, ki je prvo leto vključen v šolo v Sloveniji, ob koncu šolskega leta ocenijo, in učitelji, ki ga ne ocenijo.

Primerjali smo tudi stališča pri učiteljih v OŠ in SŠ, ki poučujejo različne vrste predmetov. Ugotovili smo, da se dosežki na lestvici pozitivnih stališč do pomoči priseljencem (F4) ne razlikujejo statistično značilno. Statistično značilne razlike med skupinami pa smo našli pri prvih treh stališčnih podlestvicah, na podlestvici F1, $\chi^2(4) = 16,64$, $p = ,002$, na podlestvici F2, $\chi^2(4) = 16,79$, $p = ,002$, in na podlestvici F3, $\chi^2(4) = 9,64$, $p = ,049$. Na podlestvici F1 – negativna stališča do otrok priseljencev so imeli učitelji slovenščine in tujih jezikov statistično značilno nižje dosežke ($Mdn = 2,46$, $MAD = 0,59$) kot učitelji strokovnih predmetov v SŠ ($Mdn = 3,30$, $MAD = 0,52$); dosežki preostalih skupin so se nahajali nekje vmes. Na podlestvici F2 – pozitivna stališča do kulturne raznolikosti so imeli učitelji slovenščine in tujih jezikov statistično značilno višje dosežke ($Mdn = 3,88$, $MAD = 0,56$) kot učitelji naravoslovnih predmetov in matematike ($Mdn = 3,38$, $MAD = 0,56$), preostale skupine so bile nekje vmes. Na podlestvici F3 – pozitiven odnos do vzgoje odprtosti parne primerjave niso odkrile statistično značilnih razlik med skupinami.

Med strokovnimi delavci, ki so bili vključeni v projekt (združeno za vrtce, OŠ in SŠ), in tistimi, ki v projekt niso bili vključeni, nismo odkrili statistično značilnih razlik v dosežkih na lestvicah stališč. Prav tako razlik nismo izsledili med tistimi, ki poznajo *Smernice za izobraževanje otrok tujcev v vrtcih in šolah*, ter drugimi, ki jih ne poznajo.

S Spearmanovim koeficientom korelacije smo za celotno skupino strokovnih delavcev izračunali, kako močno se dosežki na lestvicah stališč povezujejo z njihovo delovno dobo in s količino izkušenj z delom z otroki priseljenci (za kategorije spremenljivke glej Tabelo 1). Delovna doba ni bila statistično značilno povezana z dosežki na nobeni od stališčnih lestvic (s F1: $r = ,03$, $p = ,443$; s F2: $r = ,03$, $p = ,487$; s F3: $r = ,02$, $p = ,589$; s F4: $r = ,03$, $p = ,464$). Količina izkušenj z delom z otroki priseljenci se je nizko pozitivno povezovala s F2 – pozitivnimi stališči do kulturne raznolikosti ($r = ,15$, $p = ,112$) in F3 – pozitivnim odnosom do vzgoje odprtosti ($r = ,17$, $p = ,085$), nizko negativno s F1 – negativnimi stališči do otrok priseljencev ($r = -,19$, $p = ,049$), ni pa bilo opazne povezanosti s F4 – pozitivnimi stališči do pomoči priseljencem ($r = ,02$, $p = ,833$). Rezultati nakazujejo, da večja količina izkušenj z delom z otroki priseljenci lahko doprinese k bolj pozitivnim stališčem do kulturne raznolikosti.

Povezanost stališčnih dosežkov z drugimi spremenljivkami pri študentih

Študenti prve in druge stopnje so se statistično značilno razlikovali v dosežkih na lestvici F4 – Pozitivna stališča do pomoči priseljencem, kjer so imeli študenti druge stopnje ($Mdn = 4,50$, $MAD = 0,74$) višje dosežke kot študenti prve stopnje študija

($Mdn = 4,25$, $MAD = 0,37$), $W = 14224$, $p = ,022$. Dosežki na preostalih stališčnih lestvicah se med stopnjama študija niso statistično značilno razlikovali.

Primerjali smo tudi stališčne dosežke študentov glede na to, o kolikšnem številu ur strnjene praktičnega usposabljanja v VI-zavodih so poročali. Študente smo razdelili na dve skupini – tiste, ki so poročali o 40 urah praktičnega usposabljanja ali manj ($n = 204$), in tiste, ki so poročali o 41 urah praktičnega usposabljanja ali več ($n = 164$). Študenti z več kot 40 urami praktičnega usposabljanja so izražali manj negativna stališča do otrok priseljencev ($Mdn = 2,20$, $MAD = 0,59$) od skupine z manj usposabljanja ($Mdn = 2,39$, $MAD = 0,57$), $W = 19706$, $p = ,003$. Študenti z več praktičnega usposabljanja so izražali tudi bolj pozitivna stališča do kulturne raznolikosti ($Mdn = 4,13$, $MAD = 0,57$) kot študenti z manj usposabljanja ($Mdn = 3,88$, $MAD = 0,56$), $W = 12643$, $p < ,001$. Prvi so izražali tudi bolj pozitivna stališča do pomoči priseljencem ($Mdn = 4,50$, $MAD = 0,37$) kot drugi ($Mdn = 4,25$, $MAD = 0,37$), $W = 14680$, $p = ,041$, medtem ko se skupini v dosežku na lestvici F3 (pozitiven odnos do vzgoje odprtosti) nista statistično značilno razlikovali.

Nadalje smo primerjali tudi stališčne dosežke študentov glede na to, ali so že imeli izkušnje z delom z otroki priseljenci ali ne. Skupini sta se statistično značilno razlikovali edino v dosežkih na lestvici F2 – Pozitivna stališča do kulturne raznolikosti, in sicer so bili dosežki v skupini z izkušnjami ($Mdn = 4,14$, $MAD = 0,58$) višji kot v skupini brez izkušenj ($Mdn = 4,00$, $MAD = 0,56$), $W = 20009$, $p = ,001$.

Dosežke na stališčnih lestvicah smo primerjali tudi glede na to, ali so bili udeleženci sami priseljeni v Slovenijo ali ne, ali so njihovi starši/skrbniki priseljeni v Slovenijo ali ne, in glede na to, ali so dlje časa bivali v tujini. Status priseljencev je bil statistično značilno povezan samo s pozitivnostjo stališč do pomoči priseljencem (v skupini priseljenih: $Mdn = 4,75$, $MAD = 0,37$; v skupini nepriseljenih: $Mdn = 4,50$, $MAD = 0,37$; $W = 418$, $p = ,029$), daljše bivanje v tujini pa z manj izraženimi negativnimi stališči do otrok priseljencev (v skupini s takimi izkušnjami: $Mdn = 1,90$, $MAD = 0,65$; v skupini brez takih izkušenj: $Mdn = 2,20$, $MAD = 0,44$; $W = 449$, $p = ,003$), medtem ko se staršev status priseljencev ni statistično značilno povezoval z dosežkom na nobeni od stališčnih lestvic.

SKLEPNE UGOTOVITVE

Rezultati naše raziskave kažejo na dokaj visoko izraženost negativnih stališč do otrok priseljencev in razmeroma zadržan odnos do kulturne raznolikosti. Izkazalo se je, da so bila z višanjem stopnje VI-programa, v katerem delujejo strokovni delavci, prisotna vse bolj negativna stališča do otrok priseljencev. Ti raziskovalni izsledki odpirajo nova vprašanja, zlasti:

- Kje iskati razloge za manj spodbudna stališča pri strokovnih delavcih v primerjavi s študenti?

- Zakaj smo pri zaposlenih strokovnih delavcih v SŠ izsledili bolj negativna stališča kot pri preostalih dveh skupinah strokovnih delavcev?
- Kako v študij vključevati več izkušenj dela z učenci priseljenci oz. marginaliziranimi skupinami?
- Na kakšen način (z izobraževanjem) vplivati na spremembo stališč strokovnih delavcev?

Če pri odgovorih na omenjena vprašanja izhajamo iz v uvodu poudarjenih razmišljanj Cvete Razdevšek Pučko (1990), potem lahko manj spodbudna stališča pri strokovnih delavcih pripišemo zlasti »šibkosti« in neutrjenosti bolj konstruktivnih stališč, ki bi jih lahko oblikovali kot študenti med študijem. V delovnem okolju so nanje verjetno močneje vplivale kultura in ustaljene pedagoške prakse v posameznih VI-zavodih, kjer so se zaposlili. O takšnem dogajanju na univerzitetnem študiju poroča veliko študentov (zlasti na višjih stopnjah študija), ki že imajo neposredne izkušnje s pedagoškim delom. V tem kontekstu bi zato morali razmisliti o možnostih intenzivnega pedagoškega dela s celotnim kolektivom v posameznih VI-zavodih, z namenom spreminjanja nekonstruktivnih stališč oz. kritične refleksije ustaljenih pedagoških praks, ki so neredko žal strokovno in etično vprašljive.

Rezultati raziskave nakazujejo, da bi bilo pri strokovnih delavcih, še zlasti učiteljih strokovnih in naravoslovnno-matematičnih predmetov, smiselno uvesti ukrepe za dodatno spodbujanje pozitivnega odnosa do (otrok) priseljencev in kulturne raznolikosti. Pri razvoju ukrepov bi bilo smiselno upoštevati specifične predmetnih področij in določenim skupinam učiteljev nameniti še posebno pozornost. Z vidika izobraževanja bodočih pedagoških delavcev, kjer se kažejo očitne razlike glede na profil (npr. študij predšolske vzgoje ni univerzitetni, temveč visokošolski strokovni študij; pri bodočih osnovnošolskih učiteljih je večinoma uveljavljen t. i. integrirani model, medtem ko je za predmetne učitelje, zlasti srednješolske, uveljavljen t. i. 'vzporedni', *concurrent* model, ko se pedagoški predmeti pojavijo šele na drugi stopnji študija), bo treba razmisliti, kaj se zgodi v procesu »oblikovanja« učiteljev. Sodeč po naših podatkih trajanje študija ne igra prav velike vloge, saj imajo z vidika dela z otroki priseljenci zaposleni v vrtcu bistveno bolj konstruktivna stališča kot srednješolski učitelji. Ker je spreminjanje ustaljenih stališč dolgotrajen proces, bi bilo res treba temeljito razmisliti, ali v strnjeni obliki – ko naj bi bodoči učitelji po triletnem izobraževanju na izbranem strokovnem področju pridobili potrebna pedagoška znanja v enem letu – res lahko formiramo bodočega učitelja. V tem kontekstu je treba omeniti, da v obsegu 60 kreditnih točk študenti četrtno časa (15 KT) namenijo neposredni praksi. Že zgoraj pa smo omenili, da so v procesu spreminjanja nekonstruktivnih stališč izkušnje lahko kontraproduktivne.

Različni rezultati raziskave nakazujejo, da se večja količina izkušenj dela z otroki priseljenci povezuje s pozitivnejšimi stališči do kulturne raznolikosti in z manj izraženimi negativnimi stališči do priseljencev. Glede na podatke o številu otrok in mladostnikov priseljencev v naših VI-zavodih bi bilo v okviru študijske prakse dobro

razmisliti o bolj strukturiranih izkušnjah dela z njimi in tudi drugimi posamezniki, ki se med šolanjem soočajo z različnimi ovirami (npr. revni, otroci s posebnimi potrebami, Romi) (Macura, Dimitrijević 2016; Zorman 2016). Njihove sprotne izkušnje pa bi morale biti nato temeljito prediskutirane in podprte s teoretskimi koncepti, ki bi jim bili v oporo pri nadaljnjem bolj konstruktivnem odzivanju. To pomeni, da bi bilo dobro v študij kot tudi v nadaljnje strokovno izobraževanje vključiti več izkustvene-ga učenja (Marentič Požarnik, Šarić, Šteh 2019), ki pa zahteva nekaj več časa (kot npr. strnjanih osem ur dodatnega izobraževanja) in intenzivnega dela.

Na zadnja vprašanja v anketi o lastni izkušnji priseljenstva in daljšega bivanja v tujini je odgovorilo manj študentov kot na preostala vprašanja, zato zaključke težko posplošujemo. Bi pa veljalo razmisliti o dodatnih, bolj očitnih spodbudah, da bi se študenti in že zaposleni strokovni delavci pogosteje odločili za odhod v tujino, kjer bi bivali dlje časa in bili bolj izpostavljeni kulturni raznolikosti kot doma. Tako bi na podlagi lastnih izkušenj tudi bolje spoznali doživljanje priseljenih v novem okolju in s tem poglobili svoje razumevanje položaja priseljenih.

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SUMMARY

ATTITUDES OF (FUTURE) EDUCATIONAL STAFF AS A BASIS FOR QUALITY INCLUSION OF IMMIGRANT CHILDREN

Irena LESAR, Ivana MAJCEN, Anja PODLESEK

In 2018/19, approximately 14,000 immigrant children were included in Slovenian educational institutions. It is thus necessary to address potential prejudice against such children and to develop inclusiveness and cross-cultural competencies in (future) teaching staff.

The present study aimed to assess the attitudes towards inclusive education, cultural diversity and immigrants in different groups of participants: staff in preschools ($n = 201$), primary schools ($n = 495$), and high schools ($n = 67$), and in students who are trained for work in education ($n = 411$). The developed attitude scale contained four subscales, which measured: (i) negative attitudes toward immigrant children, (ii) positive attitudes toward cultural diversity, (iii) positive attitudes toward education of openness, and (iv) positive attitudes toward helping immigrants.

We found that the participants reported extremely positive attitudes toward education of openness. However, the participants had relatively reserved attitudes toward cultural diversity and immigrant children. Among the four groups, high-school staff showed the most negative attitudes toward immigrant children and the least positive attitudes toward cultural diversity; students showed the most positive attitudes toward helping immigrants.

In preschools, teachers showed more negative attitudes toward immigrant children than headmasters. In primary and high school, teachers of Slovene and foreign languages showed the least negative attitudes toward immigrant children and the most positive attitudes toward cultural diversity. In contrast, teachers of vocational subjects showed the most negative attitudes toward immigrant children, and teachers of math and STEM subjects showed the least positive attitudes toward cultural diversity. The number of experiences with immigrant children showed a weak negative correlation with negative attitudes toward immigrant children and a weak positive correlation with positive attitudes toward cultural diversity and education of openness.

Students with more practice in a work setting exhibited more positive attitudes toward cultural diversity and helping immigrants and fewer negative attitudes toward immigrant children. Students with experience working with immigrant children exhibited more positive attitudes toward cultural diversity. Students who had spent more time abroad showed less negative attitudes toward immigrant children. The results, therefore, showed that exposure to cultural diversity might contribute to accepting diversity and developing more positive attitudes toward immigrant children.

Based on these findings, different measures are proposed to change the less constructive attitudes: providing teachers with support and further education on working with immigrant children; encouraging self-reflection; promoting an inclusive culture within the institution as a whole; and encouraging (future) teachers to spend some time abroad.

KNJIŽNE OCENE

BOOK REVIEWS

Marcelo J. Borges in Sonia Cancian (ur.), *Migrant Letters: Emotional Language, Mobile Identities, and Writing Practices in Historical Perspective*

London, New York, Routledge, 2018, 206 str.

Zbornik z naslovom *Migrant Letters: Emotional Language, Mobile Identities and Writing Practices in Historical Perspective* prinaša osem razprav, ki se posvečajo različnim stališčem izseljenske korespondence. Uredila sta ga Marcelo Borges in Sonia Cancian, raziskovalca, ki se več let ukvarjata s študijem tega vznemirljivega, a žal prevečkrat – vsaj na naših tleh – zapostavljenega stališča študija migracij. Sonia Cancian je z analizo čustvenih razmerij med izseljenimi in svojci v monografiji *Families, Lovers and their Letters: Italian Postwar Migration to Canada* opozorila na emocionalno dimenzijo odnosov, ki jo zaznamujejo migracije, Borges pa je objavil pomembna dela o portugalskih migracijah v Latinsko Ameriko. V njih skuša transatlantske migracijske mreže pojasniti tudi s pomočjo študija izseljenske korespondence. Članki, objavljeni v pričujočem zborniku, niso popolnoma izvorni, saj so že bili objavljeni v posebni številki specializirane revije *The History of the Family* 21/ 3, 2016.

V uvodni razpravi urednika predstavitva zgodovino akademskega raziskovanja selitvene korespondence. Ne čudi, da kot pionirsko delo navajata klasično študijo humanistične sociologije *The Polish Peasant in Europe and America*, ki temelji na obširnem naboru pisem izseljencev, objavljenih v poljskem časopisu. Omenjena študija je pisma uporabila, da bi dokazala tezo, kako so preoceanske migracije izkoreninile nekdanje čvrste skupnosti in jih podvrgele neusmiljenemu moralnemu razkroju, ki naj bi ga prineslo življenje v urbanem industrializiranem okolju na drugi celini. S kompleksnejšim razumevanjem migracijskih procesov, ko selitev ne pomeni več izkoreninjenja ali presajanja, temveč so v ospredju transnacionalni stiki med svetovoma priselitve in odselitve, tudi migrantska korespondenca pridobiva novo dimenzijo. Pomembno postaja razumevanje (pre)oblikovanja družinskih in osebnih pa tudi skupnostnih stikov, ki so bili zaradi selitev prekinjeni oziroma spremenjeni. Spreminjanje odnosov, občutenj, mentalitet na ravneh posameznika, družine in skupnosti tako v okoljih priselitve kot v izvornem okolju ter v tistem »vmesnem« prostoru, ki ga živijo migranti, so tiste dimenzije, ki jih v najboljši meri omogoča prav analiza selitvene korespondence.

Da bi raziskovanje doseglo resnično pomemben rezultat, je, kot pravita urednika, treba preučevati korespondence iz različnih zgodovinskih, kulturnih in geografskih kontekstov, pri tem pa uporabiti spoznavne metode različnih znanstvenih disciplin. Ne glede na ta potencial, ki ga ima preučevanje korespondence, urednika ne pozabita opozoriti na že znane pomanjkljivosti kateregakoli pristopa k analizi pisemskega gradiva. Arhivske zbirke so vselej nepopolne, saj nikoli ne moremo točno vedeti, koliko pisem je bilo poslanih med tistimi, ki so odšli, in onimi, ki so bili doma, ne poznamo stališč tistih, ki pisem niso pisali, in ne moremo posplošiti ugotovitev raziskave, ki se je posvetila točno določeni družini. Oviro je mogoče, kot poudarjata tudi urednika, vsaj

nekoliko omiliti s sistematičnim zbiranjem in katalogiziranjem pisem najrazličnejših skupin izseljencev oziroma njihovih svojcev. V državah z dolgo tradicijo izseljevanja oziroma priseljevanja so se projektov zbiranja, arhiviranja in digitaliziranja gradiva že lotili, tako da imajo raziskovalci močno olajšano delo, medtem ko v Sloveniji kaj takega – kljub resnično dolgi in razgibani zgodovini odhodov – za zdaj še nimamo. V vsakem primeru je, kot dokazujeta urednika, preučevanje korespondence močno povezano z raziskovanjem družine in njene preteklosti. Prav analiza dopisovanja je namreč tista, ki omogoča zaznavanje sprememb v družinskih strukturah in odnosih, dovoljuje vpogled v mentalitete in nudi edinstven okvir za raziskovanje čustev med posameznimi družinskimi člani. Razprave v zborniku torej izhajajo iz tradicije, umeščene v analizo pisemske korespondence s stališča družine. Odlikujejo jih sodobni prijemi razumevanja migracij, zato bodo nedvomno v pomoč pri nadaljnjem raziskovanju.

Prva razprava znanega ameriškega raziskovalca izseljenskih pisem, zgodovinarja Davida Gerberja, se z družinske ravni preseli v svet posameznikovih občutenj. Zanimajo ga namreč individualni psihološki procesi, oziroma natančneje, vloga nostalgije pri stabiliziranju posameznikove identitete po naselitvi. Gerber izhaja iz prepričanja, da mora imeti človek stabilen jaz, ki se z migracijo kljub neizbežnim spremembam v temelju ne preoblikuje. Trdi, da mora selitev v novo okolje, če naj bo uspešna, sprožiti navezavo novih pritikin identitete na tisto, kar je v posameznikovi zavesti že prisotno. V tem procesu naj bi imela nostalgija zelo pomembno vlogo. S pisanjem pisem se je po mnenju avtorja razvila nostalgična refleksija, s tem pa tudi oblikovanje stabilnih identitet. Gledanje v preteklost, ugotavlja, ima lahko dve funkciji – bodisi omogoča soočanje s trenutnim položajem ali pa sproža neumorno domotožje.

Tezo podkrepi z analizo dveh primerov. V prvem predstavi izseljenko iz Irske v ameriški zvezni državi Virginia. Z možem, premožnim irskim trgovcem, je načrtovala vrnitev v domovino, vendar jima je to preprečila vojna. Njeno nadaljnje življenje je zato zaznamovalo hrepenenje po nikoli uresničeni vrnitvi, ki se je izražalo v dopisovanju s sestro. Življenje angleškega kamnoseka pa je bilo, nasprotno, zaznamovano z zavestjo o boljših delovnih in splošnih razmerah v ZDA, ob strani pa mu je poleg žene stala tudi širša priseljska skupnost. V spominskih drobcih je zato skušal izbrskati tiste dele, s pomočjo katerih je bilo življenje v novem svetu boljša alternativa. Gerber opozarja, da si je večina raziskav dopisovanja prizadevala analizirati socialne dimenzije življenja (npr. vključevanje v družbo priselitve), pri tem pa je spregledala psihološko plat. Prispevek, v katerem psihologiji daje prednost pred sociologijo migracij, je tako namenjen zapolnitvi te vrzeli.

S tem, kako premostiti razdaljo med individuumom in skupnostjo, se ukvarja tudi britanska raziskovalka Emma Moreton. Pod drobnogled je vzela zbirko pisem irskih izseljenk – v članku se osredotoča na pisma ene med njimi – iz večjega digitaliziranega korpusa irske izseljenske korespondence. Da bi ugotovila, katere teme se v pismih izseljenke najpogosteje pojavljajo in kako jih naslavlja, uporabi tako kvalitativne kot kvantitativne metode. Besede v pismih so najpogosteje res čustveno

zaznamovane in tudi zato so pisma dragocen vir za vse, ki se ukvarjajo s tako aktualno temo, kot je zgodovina emocij. Vendarle pa se pri razbiranju sporočevalčevih misli skriva določena past, opozarja avtorica razprave, saj ni enostavno ugotoviti, katere besede ustrezajo določenim občutjem oziroma analitičnim kategorijam, ki naj bi stale za njimi. Rešitev iz zagate britanska avtorica vidi v digitalni humanistiki, ki s pomočjo računalniških modelov omogoča analizo korpusov migrantskih pisem. Digitalizacija in katalogizacija pisem omogočata povezovanje posameznih zbirk in s tem vstavljanje individualnih izkušenj v celotno sliko, trdi avtorica. Čeprav v prispevku s pomočjo računalniške analize jezika preučuje spominjanje zgolj ene od izseljenk, je njena razprava izhodišče za nadaljnje raziskovanje obširne zbirke irskih pisem okrog štiriindvajsetih tematskih sklopov, ki jih je začrtala v pričujočem članku.

V središču zanimanja prispevka Babs Boter in Suzanne M. Sinke je oblikovanje 'pisemske osebnosti' (*epistolary persona*) in njene povezanosti s prevladujočimi pojmovanji moškosti. Avtorici izhajata iz predpostavke, da so pisci delovali v skladu s t. i. pisemsko etiko in so torej v pisma vključevali tisto, kar je veljalo za primerno, in izpuščali ono, kar bi vzbujalo pomisleke. Zlasti ju zanima, kako so pisanje usklajevali s pričakovanji glede vloge moških v tedanji družbi. Da bi ponazorili, kako so bile podobne moškosti povezane z družinskimi vlogami v okoliščinah izjemne oddaljenosti, sta avtorici analizirali pisanje dveh nizozemskih izseljencev v ZDA in Kanadi, ki sta vsak na svoj način izražala predpostavljeno spolno vlogo. Medtem ko je prvi s pisanjem izražal lojalnost izvorni družini, nizozemski priseljenski skupnosti in cerkveni občini ter poudarjal svojo delavnost, je drugi popisoval nemočno vdajanje alkoholu, slabe življenjske razmere in brezposelnost. Avtorici sta v besedah prvega prepoznali simbole hegemonije, v izrazih drugega pa podredljive moškosti. Razlike v pisanju enega in drugega avtorici pojasnjujeta s socialnim izvorom in z načinom selitve. Prvi se je iz Nizozemske v sklopu verige okoliških migrantov izselil sam, drugi pa je za seboj pustil ženo in otroke. Veliko pogosteje v izseljenskih zbirkah naletimo na tiste, ki so bliže prvemu, torej izseljencu, ki moškost izraža v skladu z družbenimi pričakovanji, kot tistemu, ki so ga okoliščine vodile k resignirani odpovedi od pričakovane vloge.

Razprava Sonie Cancian in Simone A. Wegge ekonomska vprašanja v zvezi z migranti osvetljuje s pomočjo jezika emocij, intimnosti in družinskih razmerij. Raziskovalki sta se oprli na sedem zbirk migrantskih pisem, ki so del širše kolekcije digitalnega arhiva izseljenske korespondence Immigration History Research Centra v Minneapolisu. Analizirane zbirke pripadajo šestim družinam iz srednje- in vzhodnoevropskih držav ter družini iz Italije. Gradivo je raziskovalki napotilo k sklepu, da so bili izseljenci ekonomsko znatno bolj ambiciozni od svojcev v Evropi. Potrdili sta znano tezo, da so tisti, ki so (bili) materialno prikrajšani, veliko bolj obremenjeni z ekonomskimi vprašanji kot migranti s stabilnim virom dohodkov. Revščina je diskurz med migranti in svojci od ustaljenih družinskih vprašanj preusmerila izključno k problemu preskrbe in zagotavljanja blagostanja.

Prispevek Marcela Borgesa se prav tako ukvarja z ekonomskimi vprašanji, natančneje s tem, kako so portugalski migranti s pomočjo dopisovanja urejali in

usklajevali selitvene strategije. Posebej se posveča t. i. 'pismom poziva' (v portugalščini *cartas de chamada*), s katerimi so izseljenci člane svoje družine skušali priklicati v novi svet. Borgesova študija temelji na analizi korpusa, ki obsega več kot dva tisoč pisem, napisanih v več kot petdesetih letih (od leta 1870 do dvajsetih let 20. stoletja). Teh pisem ni mogoče uvrstiti med klasične zbirke družinskih korespondenc, saj je bilo v korpusu z določeno družino običajno povezano le eno pismo. Kot ugotavlja Borges, je iz pisem mogoče razbrati, da je bila selitev družinski projekt. Izseljeni očetje so skušali sebe prikazati kot odgovorne skrbnike družine, ki so družinske člane čez ocean pozvali šele, ko je bilo tam mogoče načrtovati skupno prihodnost. Otroci so se tako najpogosteje priključili šele, ko so bili zmožni dela in preden bi morali plačati davek za vojaško obvezo. Soproge pa so se možem pridružile, ko so ti potrebovali pomoč bodisi pri delu ali pri hišnih opravilih. Združevanje družin so tako narekovala ekonomsko-socialna vprašanja. Pisma poziva, sklene Borges, nam omogočajo razumeti, kako so pari usklajevali spreminjajoče se vloge ter povezali transnacionalno zastavljene življenjske projekte.

»Neklasična« izseljenska pisma v svojem prispevku analizira tudi britanska sociologinja Liz Stanley. Posvetila se je preučevanju pisemske zbirke britanskih naseljencev v južnoafriških provincah Natal in Transval med letoma 1850 in 1922. Pripadniki družine Forbes so za seboj pustili na tisoče sedaj digitaliziranih dokumentov; del te zbirke je analizirala Liz Stanley. Proučena zbirka se v temelju razlikuje od tistih, ki so jih raziskovalci običajno analizirali, torej od pisem, ki so krožila med ZDA in Severno Evropo. Večina pisem, ki jih je vzela pod drobnogled, je bila omejena na južnoafriške teritorije, v katerih so naseljenci živeli. Pisali so jih kolonisti s podjetniškimi ambicijami, zato so bolj kot k refleksiji preteklosti in introspekciji usmerjena k praktičnim vprašanjem poslovanja. Njihovo dopisovanje je Liz Stanley razumela v luči koncepta skripturalne ekonomije. Dopisovanje je bilo tako osrednjega pomena za vzdrževanje njihovega gospodarstva, z ekonomsko funkcijo pisem pa so bile neločljivo povezane tudi emocionalne in socialne plati pisanja. Odstopanje preučevanega primera od ustaljene podobe izseljenske korespondence jo je napeljalo k sklepu, da bi morali raziskovalci pisemskega gradiva, da bi prišli do zares pomembnih spoznanj, preučiti čimbolj raznolike selitvene kontekste.

Laura Martínez Martín z univerze v Lizboni se v svojem prispevku prav tako dotika dimenzij, ki so jih analize izseljenske korespondence velikokrat puščale ob strani. Bolj kot kolektivno naravo dopisovanja so te namreč obravnavale individualna razmerja med sporočevalcem in naslovnikom. Martín pravilno opozarja, da je bilo tako pri pisanju kot pri prejemanju pisem udeleženi bistveno več ljudi, kot si običajno predstavljamo. Večglasnost dopisovanja je prikazala z analizo digitalizirane zbirke, ki obsega pisma izseljencev iz Asturije (regije na severu Španije) v obeh Amerikah iz obdobja med drugo polovico 19. stoletja in tridesetimi leti 20. stoletja. Pokazala je, da so pri pisanju izseljenci le redko lahko računali na možnost intimnih izpovedi, ne le zato, ker je pri oblikovanju pisem sodelovalo več ljudi, ampak tudi zato, ker jih je bilo strah, da bi skrivnosti začele krožiti v domači vasi. Prispevek torej prepričljivo

pokaže, da izseljenskih pisem ne moremo razumeti zgolj kot zasebnih sporočil med individuumi, temveč moramo upoštevati sodelovanje pripadnikov družine in širše sorodstvene oziroma vaške skupnosti, in to tako pri pisanju kot prejemanju pisem.

Romeo Guzmán s kalifornijske univerze v Fresnu se pridružuje ugotovitvi Liz Stanley o centralnosti, ki jo pri preučevanju korespondenc zaseda dopisovanje med ZDA in Evropo. Sam se v razpravi posveča priseljencem iz Mehike, ki kljub več kot stoletnemu priseljevanju v severno sosedo še niso bili deležni primerne obravnave, zlasti ne s stališča preučevanja epistolarnih zvez. Guzmán na primeru pisem družine Venegas, katere člani so živeli v Guadalajari in Los Angelesu, pokaže, kako je družina oblikovala transnacionalno življenje in s pomočjo dopisovanja obnovila s selitvijo pretrgane vezi. Posebno pozornost posveča najbolj obremenjujočim časom, to je gospodarski krizi v tridesetih letih in drugi svetovni vojni. Družina v Mehiki je, da sta lahko Miguel in njegova žena prebrodila najneugodnejše ekonomske okoliščine, ne da bi bila deportirana v Mehiko, tako kot veliko njunih rojakov, med krizo igrala ključno vlogo. Tako obsežna zbirka, kot so jo odstopili Venegasovi, nudi zgodovinarju temeljit vpogled v zgodovino transnacionalnih stikov neke družine.

V zborniku objavljene razprave se preučevanja izseljenske korespondence lotevajo z najrazličnejših plati. Tako se lahko seznanimo z individualno-psihološkimi razsežnostmi izseljenskega življenja, izpolnjevanjem pričakovanj v zvezi s spolnimi vlogami, oblikovanjem migracijskih strategij, s transnacionalnimi družinskimi povezavami in z drugimi dilemami. Nabor vprašanj, pester izbor virov – zbirke korespondenc ter raznolikost disciplinarnih metod so vsekakor navdušujoči. Zbornik je tako dober napotek za slovenske raziskovalce, ki so že objavili pomembna dela na tem področju, vendar svojega dela ne morejo poglobiti, saj (za zdaj) še ni mogoče računati na digitalizirane zbirke, kakršne so uporabili avtorji prispevkov v zborniku. Upajmo, da bomo ta primanjkljaj lahko kmalu premostili in postregli z raziskavami, ki ne bodo le sad navdušenega zbiranja posameznih raziskovalcev, temveč bodo temeljile na korpusih digitaliziranega in sistematično zbranega gradiva. S tem bi tudi nadomestili pomanjkanje uradnih virov o izseljenstvu, ki bremeni slovenske raziskovalce migracij.

Miha Zobec

NAVODILA AVTORJEM ZA PRIPRAVO PRISPEVKOV ZA »DVE DOMOVINI / TWO HOMELANDS«

1. Usmeritev revije

Revija *Dve domovini / Two Homelands* je namenjena objavi znanstvenih in strokovnih člankov, poročil, razmišljanj 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 večjezična. Dve številki letno v tiskani in elektronski obliki izideta na svetovnem spletu (<http://twohomelands.zrc-sazu.si/>).

Prispevke, urejene po spodnjih navodilih, pošljite uredništvu v elektronski obliki na naslov hladnik@zrc-sazu.si. Članki so recenzirani. Avtorji naj poskrbijo za primerno jezikovno raven in slogovno dovršenost. Prispevki morajo biti oblikovani v skladu z Navodili avtorjem za pripravo prispevkov za *Dve domovini / Two Homelands*. Rokopisov, ki jih uredništvo revije *Dve domovini / Two Homelands* sprejme v objavo, avtorji ne smejo hkrati poslati drugi reviji. V skladu z Zakonom o avtorskih pravicah in 10. členom Poslovnika o delu uredništva revije *Dve domovini / Two Homelands* se avtorji z objavo v reviji *Dve domovini / Two Homelands* strinjajo z objavo prispevka tudi v elektronski obliki na svetovnem spletu.

2. Sestavine prispevkov

Članki morajo imeti sestavine, ki si sledijo po naslednjem vrstnem redu:

- glavni naslov članka (z velikimi tiskanimi črkami, okrepjeno);
- ime in priimek avtorja (priimku naj sledi opomba pod črto, v kateri so navedeni: 1. avtorjeva izobrazba in naziv (na primer: dr. zgodovine, znanstveni sodelavec); 2. ime in naslov avtorjeve institucije (na primer Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, Novi trg 2, SI-1000 Ljubljana); 3. avtorjev elektronski naslov);
- predlog vrste prispevka (izvirni, pregledni ali kratki znanstveni članek/prispevek, strokovni članek);
- izvleček (slovenski naslov članka in slovenski izvleček, skupaj s presledki do 700 znakov);
- ključne besede (do 5 besed);
- abstract (angleški prevod naslova članka in slovenskega izvlečka);
- keywords (angleški prevod ključnih besed);
- članek (1. skupaj s presledki naj ne presega 45.000 znakov; 2. celotno besedilo naj bo označeno z »Normal« – torej brez oblikovanja, določanja slogov in drugega; 3. pisava Times New Roman, velikost 12, obojestransko poravnava, presledek 1,5; 4. odstavki naj bodo brez vmesnih vrstic; prazna vrstica naj bo pred in za vsakim naslovom in predvidenim mestom za tabelo ali sliko; 5. odstavki so brez zamikov; 6. naslove označite ročno, podnaslove prvega reda z okrepljenimi malimi tiskanimi črkami, podnaslove drugega reda z okrepljenimi poševnimi malimi tiskanimi črkami; 7. (pod)poglavij ne številčimo;
- summary (angleški povzetek članka, največ 3000 znakov s presledki).

V besedilih se izogibajte podčrtovanju besed, okrepljenemu in poševnemu tisku; s poševnim tiskom označite le navedene naslove knjig in časopisov. V slovenskih prispevkih uporabljajte naslednje okrajšave in narekovaje: prav tam, idr., ur., »abc«; v angleških: *ibid.*, et al., ed./eds., "migration". Izpust znotraj citata označite z oglatim oklepajem [...].

Poročila in ocene morajo imeti sestavine, ki si sledijo po naslednjem vrstnem redu:

- poročila s konferenc in z drugih dogodkov, razmišljanja: naslov dogodka, datum poteka, ime in priimek avtorja, besedilo naj obsega med 5.000 in 15.000 znaki skupaj s presledki;
- knjižne ocene: ime in priimek avtorja ali urednika knjige, ki je predmet ocene, *naslov knjige*, založba, kraj, leto izida, število strani, besedilo naj obsega med 5.000 in 15.000 znaki skupaj s presledki, na koncu sledita ime in priimek avtorja ocene.

3. Citiranje

Avtorji naj pri citiranju med besedilom upoštevajo naslednja navodila:

- Citati, dolgi štiri ali več vrstic, morajo biti ročno oblikovani v ločenih enotah, levo zamaknjeni, brez narekovajev.
- Citati, krajši od štirih vrstic, naj bodo med drugim besedilom v narekovajih in pokončno (ne poševno).
- Navajanje avtorja v oklepaju: (Anderson 2003: 91–99); več navedb naj bo ločenih s podpičjem in razvrščenih po letnicah (Milharčič Hladnik 2009: 15; Vah Jevšnik, Lukšič Hacin 2011: 251–253).
- Seznam literature in virov je na koncu besedila; v seznamu literature na koncu se navajajo samo navedbe literature iz besedila; enote naj bodo razvrščene po abecednem redu priimkov avtorjev, enote istega avtorja pa razvrščene po letnicah; če imamo več del istega avtorja, ki so izšla istega leta, jih ločimo z malimi črkami (Anderson 2003a; 2003b).
 - a) Knjiga:
Anderson, Benedict (2003). *Zamišljene skupnosti: O izvoru in širjenju nacionalizma*. Ljubljana: Studia Humanitatis.
 - b) Članek v zborniku:
Milharčič Hladnik, Mirjam (2009). Naša varuška. *Krila migracij: Po meri življenjskih zgodb* (ur. Mirjam Milharčič Hladnik, Jernej Mlekuž). Ljubljana: Založba ZRC, ZRC SAZU, 15–20.
 - c) Članek v reviji:
Vah Jevšnik, Mojca, Lukšič Hacin, Marina (2001). Theorising Immigrant/Ethnic Entrepreneurship in the Context of Welfare States. *Migracijske i etničke teme* 27/2, 249–261. Polnopomenski elementi v angleških naslovih knjig in člankov (razen veznikov in predlogov) se pišejo z veliko začetnico.
 - d) Spletna stran:
 - Becker, Howard (2003). *New Directions in the Sociology of Art*, <http://home.earthlink.net/~hsbecker/newdirections.htm> (1. 2. 2008).
 - *Interaction: Some Ideas*, <http://home.earthlink.net/interaction.htm> (1. 2. 2008).

4. Grafične in slikovne priloge

- Fotografije, slike zemljevidi idr. – z izjemo tabel, narejenih v urejevalniku Word, ki pa morajo biti oblikovane za stran velikosti 16,5 x 23,5 cm – naj ne bodo vključeni v Wordov dokument. Vse slikovno gradivo oddajte oštevilčeno v posebni mapi s svojima priimkom in imenom. Opombe v podnapisih ali tabelah morajo biti ločene od tekočega teksta. Fotografije naj bodo v formatu jpg.
- Lokacijo slikovnega gradiva v tekstu označite na naslednji način:
Fotografija 1: Kuharica Liza v New Yorku leta 1905 (avtor: Janez Novak, vir: Arhiv Slovenije, 1415, 313/14) ali Preglednica 1: Število prebivalcev Ljubljane po popisu leta 2002 (vir: Statistični urad RS, Statistične informacije, 14).
- Za grafične in slikovne priloge, za katere nimate avtorskih pravic, morate dobiti dovoljenje za objavo.

INSTRUCTIONS TO AUTHORS PREPARING ARTICLES FOR PUBLICATION IN *DVE DOMOVINI / TWO HOMELANDS*

1. Editorial content

Dve domovini / Two Homelands welcomes the submission of scientific and professional articles, reports, discussions and book reviews from the humanities and social sciences focusing on migration and related phenomena. The journal, published since 1990, is multidisciplinary and multilingual. Two volumes are published per year in print and electronic form on the internet (<http://twohomelands.zrc-sazu.si/>).

Articles should be prepared according to the instructions stated below and sent in electronic form to the editorial board at the following address: hladnik@zrc-sazu.si. All articles undergo a review procedure. Manuscripts that are accepted for publishing by the editorial board should not be sent for consideration and publishing to any other journal. Authors are responsible for language and style proficiency. Authors agree that articles published in *Dve domovini / Two Homelands* may also be published in electronic form on the internet.

2. Elements

Articles should contain the following elements in the order given:

- Title (in capital letters, bold);
- Name and surname of the author (after the surname a footnote should be inserted stating the author's: 1. education and title (e.g. PhD, MA in History, Research Fellow, etc.); 2. full postal address (e.g., Slovenian Migration Institute, Novi Trg 2, SI-1000 Ljubljana); 3. e-mail address;
- Type of contribution (original, review, or short scientific article; professional article);
- Abstract (title of the article and abstract, up to 700 characters with spaces);
- Keywords (up to 5 words);
- Article (1. should not exceed 45,000 characters with spaces; 2. the style of the entire text should be "Normal"; 3. font: Times New Roman 12; 4. paragraphs should not be separated by an empty line, empty lines should be used before and after every title and space intended for a chart or figure; 5 paragraphs following titles should not be indented, bullets and numbering of lines and paragraphs should be done manually; 6. titles should be marked manually, subtitles Heading 1 in bold lower-case letters with initial capital, Heading 2 in bold lower-case italics with initial capital; 7. (sub)sections of articles (Heading 1 and Heading 2) should not be numbered);
- Summary (Povzetek) in Slovene, 3000 characters with spaces.

Avoid underlining and using bold in all texts. Italics should be used when emphasizing a word or a phrase. Italics should also be used when citing titles of books and newspapers. In articles in English, the following abbreviations should be used: *ibid.*, *et al.*, *ed./eds.* When using inverted commas/quotation marks, use double quotation marks; single quotation marks should be used only when embedding quotations or concepts within quotations. Omitted parts of quotations should be indicated by square brackets with ellipsis [...].

Reports and reviews should contain the following elements in the order given:

- Reports from conferences and other events, discussions: title of the event, date of the event, name and surname of the author, 5,000 to 15,000 characters with spaces;
- Book reviews: name and surname of the author or editor of the book, *title of the book*, name of publisher, place of publication, date of publication, number of pages, 5,000 to 15,000 characters with spaces, with the name and surname of the reviewer at the end.

3. Quotations in articles

- Long quotations (four lines or more) should be typed as an indented paragraph (using the “tab” key), without quotation marks, the first line of the paragraph after the quotation should not be indented; quotations shorter than four lines should be included in the main text and separated with quotation marks, in normal font (not italic).
- When citing an author in brackets use the following form: (Anderson 2003: 91–99); when citing several authors separate their names with a semicolon and cite them according to the year of publication in ascending order (Milharčič Hladnik 2009: 15; Vah Jevšnik, Lukšič Hacin 2011: 251–253).
- A list of references should be placed at the end of the text and arranged in alphabetical order according to the author’s surname. The list of references should include only cited sources and literature. Multiple references by one author should be arranged according to the year of publication. Multiple references by one author published in the same year should be separated with lower-case letters (e.g., Ford 1999a; 1999b).
 - a) Books:
Anderson, Benedict (1995). *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. London, New York: Verso.
 - b) Articles in a series:
Milharčič Hladnik, Mirjam (2009). Naša varuška. *Krila migracij: Po meri življenjskih zgodb* (eds. Mirjam Milharčič Hladnik, Jernej Mlekuž). Ljubljana: Založba ZRC, ZRC SAZU, 15–20.
 - c) Articles in journals:
Vah Jevšnik, Mojca, Lukšič Hacin, Marina (2001). Theorising Immigrant/Ethnic Entrepreneurship in the Context of Welfare States. *Migracijske i etničke teme* 27/2, 249–261. All major elements of English book and article titles should be capitalized (except conjunctions and prepositions shorter than five letters).
 - d) Internet sources:
 - Becker, Howard (2003). *New Directions in the Sociology of Art*, <http://home.earthlink.net/~hsbecker/newdirections.htm> (1 Feb. 2008).
 - *Interaction: Some Ideas*, <http://home.earthlink.net/interaction.htm> (1 Feb. 2008).

4. Graphics and illustrations

- Photographs, illustrations, maps, etc. – with the exception of charts produced in Microsoft Word, which have to be adjusted to page size 16.5 x 23.5 cm (6.5” x 9.25”) – should not be included in the Word document. All illustrative material needs to be numbered and submitted separately in separate folder with the author’s name and surname. Please submit visual material in jpg. form.
- Locations of figures in the text should be marked as follows: Figure 1: Lisa Cook in New York in 1905 (Photo: Janez Novak, source: Archives of Slovenia, 1415, 313/14) or Chart 1: Population of Ljubljana after the 2002 Census (source: Statistical Office of the Republic of Slovenia, Statistics, p. 14).
- Permission to publish must be obtained for uncopyrighted graphic and illustrative material.

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ISSN 0353-6777



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