

Domovini

home lands

Inštitut za slovensko izseljenstvo in migracije ZRC SAZU

Glavni urednik / Editor-in-Chief

Jernej Mlekuž

E-naslov: mlekuz@zrc-sazu.si

Odgovorna urednica / Editor-in-Charge

Marina Lukšič Hacin

Sourednica / Co-editor

Marijanca Ajša Vižintin

Tehnična urednica / Technical Editor

Špela Marinšek

Mednarodni uredniški odbor / International Editorial Board

Dirk Hoerder, Rudi Rizman, Marjan Drnovšek, Damir Josipovič, Aleksej Kalc,
Milan Mesić, Mirjam Milharčič Hladnik, Leopoldina Plut Pregelj, Andrej Vovko,
Adam Walaszek, Rolf Wörsdörfer, Janja Žitnik Serafin,
Kristina Toplak, Jure Gombač

Lektoriranje / Proofreading

Irena Destovnik (slovenski jezik / Slovene)

Peter Altshul (angleški jezik / English)

Oblikovanje / Design

Anja Žabkar

Prelom / Typesetting

Uroš Čuden, Medit d. o. o.

Tisk / Printed by

Collegium Graphicum d. o. o.

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;

E-naslov / E-mail: spelam@zrc-sazu.si

Spletna stran / Website: <http://isi.zrc-sazu.si>

© ZRC SAZU, Inštitut za slovensko izseljenstvo in migracije

Revija izhaja s pomočjo Javne agencije za knjigo Republike Slovenije
in Urada Vlade Republike Slovenije za Slovence v zamejstvu in po svetu.

DVE

d o m o v i n i

RAZPRAVE O IZSELJENSTVU

TWO
h o m e l a n d s

M I G R A T I O N S T U D I E S

38 • 2013

Izdaja

Inštitut za slovensko izseljenstvo in migracije ZRC SAZU

Published by

Slovenian Migration Institute at the ZRC SAZU

Ljubljana 2013

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. Revija izhaja dvakrat letno. Članki so recenzirani.

The journal ***Dve domovini • Two Homelands*** welcomes the submission of scientific and professional articles, reports, debates and book reviews from the fields of humanities and social sciences, focusing on migration and related phenomena. The journal, published since 1990, is multidisciplinary and multilingual. The journal is published biannually. All articles undergo a review procedure.

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, SSCI – Social Sciences Citation Index, Social SciSearch, Journal Citation Reports / Social Sciences Edition.

Letna naročnina 18 €. Posamezni letniki so na voljo.

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

Previous issues are available on demand.

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

VSEBINA / CONTENTS

TEMATSKI SKLOP / THEMATIC SECTION

Marginal Mobilities

Marginalne mobilnosti

- ŠPELA KALČIĆ, MARKO JUNTUNEN, NATAŠA ROGELJA**
Marginal Mobility: A Heuristic Tool for Comparative Analysis of Contemporary Mobilities 7
Marginalna mobilnost: Hevristično orodje za primerjalni študij sodobnih mobilnosti
- MARKO JUNTUNEN**
Arranging Mobile Lives: Marginalised Moroccan Men in Transnational Space 21
Urejanje mobilnih življenj: Marginalizirani Maročani v transnacionalnem prostoru
- ŠPELA KALČIĆ**
Going Nomad: New Mobile Lifestyles among Europeans 33
Med nomade: Novi mobilni življenjski stili med Evropejci
- NATAŠA ROGELJA**
Contemporary Peripatetic Adaptations: Mobility, Marginality and Inventiveness 49
Sodobne peripatetične adaptacije: Mobilnost, marginalnost in iznajdljivost
- MARI KORPELA**
Marginally Mobile? The Vulnerable Lifestyle of Westerners in Goa 63
Marginalno mobilni? Ranljivi življenjski stili med zahodnjaki v Goi
- INES KOHL**
Vagabonds or Elites? The Mobile Lifestyle of Contemporary Tuareg 73
Vagabundi ali elite? Tuaregi, moderni nomadi na poti
- ALENKA JANKO SPREIZER**
Roma, Gypsy Travellers, Gens du Voyage: People who Travel? 87
Romi, Cigani popotniki, ljudje potovanja: Ljudje, ki potujejo?

RAZPRAVE IN ČLANKI / ESSAYS AND ARTICLES

SANJA CUKUT KRILIĆ

- Obravnavanje staranja v migracijskih študijah in socialni gerontologiji 99
The Study of Ageing in Migration Studies and Social Gerontology

JURIJ KOČAR

- Podnebne selitve v okraju Shyamnagar v Bangladešu 113
Climate Migration in the Shyamnagar Sub-district in Bangladesh

MIHA ZOBEC

- Nekateri aspekti vključevanja v argentinsko družbo skozi prizmo izseljenske korespondence 129
Some Aspects of Integration into Argentinian Society through the Perspective of Emigrant Correspondence

METKA LOKAR

- Zelen kot Slovenija in rdeč kot ljubezen: Slovenski jezik med Slovenci v prostoru nekdanje Jugoslavije 141
Green as Slovenia and Red as Love: The Slovene Language among Slovenes in the Territory of Former Yugoslavia

FRANC CANKAR, TOMI DEUTSCH, OLGA DEČMAN DOBRNJIČ, STANKA SETNIKAR CANKAR

- Education of Migrant Children in an International Primary School Programme: Comparison with a Slovenian Primary School 153
Izobraževanje otrok migrantov v mednarodnem programu osnovne šole: Primerjava s slovensko osnovno šolo

KNJIŽNE OCENE / BOOK REVIEWS

- Zorana Medarić, Mateja Sedmak (ur. / eds.), *Children's Voices: Interethnic Violence in the School Environment*, Annales, Koper, 2012 (Barbara Gornik) 169

TEMATSKI SKLOP

Marginal Mobilities
Marginalne mobilnosti

T H E M A T I C S E C T I O N

MARGINAL MOBILITY: A HEURISTIC TOOL FOR COMPARATIVE STUDY OF CONTEMPORARY MOBILITIES

Špela KALČIČ,^I Marko JUNTUNEN,^{II} Nataša ROGELJA^{III}

COBISS 1.03

ABSTRACT

Marginal Mobility: A Heuristic Tool for Comparative Analysis of Contemporary Mobilities

This article's mission is twofold. First, it serves as introduction to the present thematic issue, which includes six different case studies discussing contemporary mobile lives across the globe. Second, it presents the concept of marginal mobility, which unifies the thematic issue. The marginal mobilities concept is understood as a heuristic tool for the comparative study of contemporary mobilities. Today various mobile subjects construct their mobile lives in highly comparable manner, as well as share very similar experiences. We argue that what we have at hand are new kinds of researchable entities that challenge the widely shared academic consensus for drawing clear analytical and conceptual boundaries between the mobile subjects from the Global North and South. As the contemporary analytical language of migration and mobility studies lacks an appropriate term for such mobile lifestyles, we prefer to conceptualise them as *marginal mobilities*. According to our understanding, these mobilities can be compared by the following five unifying characteristics: they are highly mobile (1), not entirely forced nor voluntary lifestyles (2) that occur along loosely defined trajectories (3). They generally lack politicized public spheres (4) and they are marked by the sentiments of marginality, liminality and constant negotiation against the sedentary norm of the nation state (5). Comparing different ethnographic cases is therefore important and can offer an opportunity to delve deeper into the cultural logic of contemporary mobile lifestyles.

KEYWORDS: marginal mobility, globalization, emerging mobile lifestyles, marginality, comparative study

IZVLEČEK

Marginalna mobilnost: Hevristično orodje za primerjalni študij sodobnih mobilnosti

Naloga pričujočega članka je dvakratna. Prvič, služi kot uvod v tematsko sekcijo šestih študij primerov, ki se ukvarjajo s sodobnimi mobilnimi življenji po svetu. Drugič, predstavlja koncept marginalne mobil-

I PhD in Social Anthropology, Research Fellow; Slovenian Migration Institute, Scientific Research Centre of the Slovenian Academy of Sciences and Arts, Novi trg 2, SI-1000 Ljubljana; spela.kalcic@zrc-sazu.si / spela.kalcic@gmail.com.

II Assistant Professor of Social Anthropology; School of Social Sciences and Humanities, FI-33014 University of Tampere, Finland; marko.juntunen@uta.fi.

III PhD in Social Anthropology, Research Fellow; Slovenian Migration Institute, Scientific Research Centre of the Slovenian Academy of Sciences and Arts, Novi trg 2, SI-1000 Ljubljana; natasa.rogelja@zrc-sazu.si.

nosti, povezujoč tematsko sekcijo. Koncept marginalne mobilnosti razumemo kot hevristično orodje za komparativno študijo sodobnih mobilnosti. Mnogi mobilni subjekti konstruirajo svoja mobilna življenja na zelo podoben način, pri čemer delijo podobne izkušnje. Menimo, da imamo opraviti z novimi oblikami raziskovalnih entitet, ki izpodbijajo razširjen akademski konsenz o jasnem analitičnem in konceptualnem razmejevanju med mobilnimi subjekti z Globalnega Severa in Juga. Ker sodobni analitični jezik študij migracij in mobilnosti ne pozna ustreznega termina za takšne mobilne življenjske stile, smo jih konceptualizirali kot *marginalne mobilnosti*. V skladu z našim razumevanjem marginalne mobilnosti lahko primerjamo po sledečih skupnih značilnostih: gre za poudarjeno mobilne življenjske stile (1), ki niso niti popolnoma prisilni niti prostovoljni (2) in potekajo vzdolž ohlapno določenih poti(3). Povečini odsotni v politiziranih javnih sferah (4) so zaznamovani s sentimentu marginalnosti, liminalnosti in obremenjeni z neprestanim pogajanjem s sedentarnimi normami nacionalnih držav(5). medsebojna primerjava različnih etnografskih primerov je torej pomembna, saj omogoča poglobitev v kulturno logiko sodobnih mobilnih življenjskih stilov.

KLJUČNE BESEDE: marginalna mobilnost, globalizacija, novi mobilni življenjski stili, marginalnost, primerjalni študij

INTRODUCTION

This thematic issue is the outcome of a seminar on "Ethnographies of Mobility" held at the School of Social Sciences and Humanities, University of Tampere, Finland, in May 2012. The seminar focused on the numerous contemporary forms of mobile lifestyles that question officially recognized and legally privileged forms of human mobility. Whether the subject is hyper-mobile Westerners¹ or migrants from the global South, these mobilities can be scrutinized only within a larger framework of global economic and technological transformation and production of hierarchies of mobile subjects. The seminar sought to open new theoretical perspectives on these mobile lives with a specific focus on the following themes: a) the interplay between mobile lifestyle strategies and global economic and political transformations; b) new theoretical perspectives for studying mobile lives and mobile subjectivities; and c) production of hierarchies of mobilities and their interplay in the particular landscapes of their encounters. Special attention was paid to the idea of "marginal mobility", a heuristic tool for comparative study of present day mobilities across the globe, designed by the authors of this introduction. The discussion was provoked by a common presentation of three case studies dealing with different forms of mobile lifestyles among Europeans and Africans in order to test its usefulness for engaging with the analytic as well as terminological aspects of the marginal mobility concept. Marko Juntunen presented the case of economically marginal Moroccan migrants moving between Morocco and Spain, while Špela Kalčič and Nataša Rogelja introduced their accounts of newly emerged nomadic lifestyles among European "houstruckers"² and "liveaboards"³ in the Mediterranean region, moving between Europe, West Africa, and elsewhere. The seminar also featured three further case studies which can be considered within the marginal mo-

1 We use the term "Westerners" as a loosely defined category that commonly refers to people from the more affluent countries of Western Europe, but also from the countries with firm historical, cultural and ethnic ties to Western Europe such as The United States, Canada, New Zealand, and Australia.

2 The term "houstruckers" is an etic term referring to Westerners travelling and living in cars, jeeps, vans, caravans, buses or trucks converted into mobile homes (Kalčič 2012). The closest emic term that some of them use to describe their lifestyle is "nomads".

3 The term "liveaboards" is used as a descriptor referring to the people who have adopted a lifestyle that revolves around living, working and traveling on boats. Liveaboards are a very diverse group and can be found throughout the canals, rivers and along the sea coasts. Some of them cruise continuously, some are permanently moored and some alternate between cruising and mooring.

bility framework and are included in the present thematic issue. Ethnographic works on *ishumar*⁴ Tuareg drifting transnationally⁵ between Saharan states (Ines Kohl), Westerners living between Goa their native countries and often also destinations such as Thailand, Ibiza or Bali (Mari Korpela), and Travellers/Gens du Voyage and Gypsies/Roma in Great Britain, France and Slovenia (Alenka Janko Spreizer) share a common thread (cf. Juntunen, Kalčić, Rogelja forthcoming).

MARGINAL MOBILITY

In the national, supranational and international regimes of mobility and scenarios of development, certain forms of mobilities are characterized by being legal, privileged, and even desired – such as tourism and the movement of skilled professionals, while other forms of human mobilities are marginalised, as they simply remain invisible in these schemes or alternatively they are perceived as undesired or irregular. Each of the selected ethnographic cases in the present thematic issue stands in complex relation to recognised and unrecognised forms of mobility. They overlap significantly with recognised forms of mobilities such as asylum, economic, and circular migrations, international retirement migration, sabbatical tourism, travelling and traditional peripatetic⁶ nomadism. However, we argue that there are numerous criteria which allow us to talk about them as representatives of distinctive types of contemporary mobilities, which are characterized by peripatetic nomadism as an economic strategy, marginality and inventiveness.

We share the belief that it is time to examine critically the mobile lives around us and challenge the widely shared academic consensus for drawing clear analytical and conceptual boundaries between the mobile subjects from the Global North and Global South. We argue that what we have at hand are researchable entities that demand new theoretical reflection from migration and mobility studies. As the contemporary analytical language of migration and mobility studies lacks an appropriate term for such mobile lifestyles, we prefer to conceptualise them as *marginal mobilities*. According to our understanding, these mobilities can be compared according to the following five unifying characteristics:

- the movement is constant, and occurs along loosely defined trajectories
- the mobility is not entirely voluntary nor forced
- the social world is marked by uprootedness and liminality and
- a lack of politicized public space
- the subjects are in a constant process of negotiation with the state bureaucracies that impose a sedentary norm on their lives.

4 The term *ishumar* derives from the French *chômeur*, unemployed person, and was transported into Tamasheq, the language of the Tuareg. Originally it described those Tuareg who gave up their nomadic life and went to the surrounding neighbouring states, above all to Algeria and Libya, to look for a job. In a second step the Tuareg rebels of the 1990s have been attached to that term. Today, *ishumar* refers to a generation of border-crossers whose living conditions have created special mobility strategies (Kohl 2007, 2009, 2010a, b, c).

5 By “transnational” we refer to various forms of interactions and communication that link both people and institutions across the borders of nation-states in increasingly globalized ways (Basch, Glick Schiller, Szanton Blanc 1992; Portes, Guarnizo, Landolt 1999; Smith, Guarnizo 1998). A focus on transnational processes and phenomena has enabled anthropologists to understand complex social and cultural processes that reach beyond spatially bounded communities and strictly spatialized referents of social identification. While transnational ethnography has profoundly contributed to the understanding of the ways in which mobility shapes people’s lives, the careful cross-cultural analysis of the contemporary forms of highly mobile lives is a largely unexplored question in anthropology.

6 Nomadism that exploits social rather than natural resources, as in the case of pastoral and hunter-gatherer nomadic societies (Berland, Salo 1986).

Our intention is not to suggest a strict and all-encompassing definition of marginal mobility, but rather to use it as an analytical prism that opens new possibilities for understanding contemporary mobilities that remain largely unaddressed in the academic discourses. We understand the concept of marginal mobility as a heuristic tool that enables comparative study of mobilities in the contemporary globalised world regardless their ethnic, national or geographic provenance and not as the only possible theoretical framework through which different contemporary mobilities can be analysed and explained.⁷

We are also fully aware of the particularities of each different case as well as of structural inequalities among different mobile subjects. We fully acknowledge institutional inequalities between the white Westerners and non-Western or traditionally nomadic people, their unequal class statuses and positions in the migrant regimes, the systems of surveillance, the racist and xenophobic practices and discourses. However we believe that comparing different ethnographic cases can create space for delving deeper into the cultural logic of contemporary mobile lifestyles.

MULTIFACETED MOBILITY

The main motive of the marginal mobility discussion is to demonstrate that at present people from both the Global North and South are responding to increasingly globalized social, political and economic challenges in a comparable manner. Increasing numbers of people are not only migrating, but are taking up highly mobile lives. For example, in the Mediterranean and West African settings that Juntunen, Kalčić and Rogelja have observed, there are many Africans with EU passports but also a considerable number of Europeans who engage in mobile lifestyles and travel between Europe and Africa. Many Europeans who engage in housetrucking or liveaboard lifestyles use mobility to “muddle through” periods of unemployment until they obtain their pensions, or alternatively, they work and use several income-making strategies while on the move (Kalčić, Rogelja this volume). They include a considerable number of people who resort to peripatetic survival strategies, i.e. nomadism that exploits social rather than natural resources, as in the case of pastoral and hunter-gatherer nomadic societies (Berland, Salo 1986). Being without regular income they have to resort to flexible economic strategies: temporary work in marinas and construction sites, periodic work in agriculture while in Europe, distance work through the Internet, and – especially among the housetruckers – transnational trading activities of second-hand vehicles, car parts and consumer goods (Kalčić, Rogelja this volume). These economic strategies are highly comparable to those of the Moroccan men (Juntunen this volume) and other West Africans followed by Kalčić along their transnational trajectories. The Moroccan migrant men in Spain work in the very same unregulated economic niches as the Westerners described above; namely in agriculture, construction and services, and more recently, actively engage in second-hand trade activities that demand constant mobility across the continents (*ibid.*).

The Westerners observed by Korpela, who spend several months every year in Goa, India, also need to work to support their mobile lifestyles. They engage in very similar work strategies as housetruckers and liveaboards. They work, for example, as fashion or jewellery designers (who sell their products in Indian tourist markets), artists, yoga teachers, massage therapists and spiritual healers, or run restaurants,

7 For example, lifestyle migration (LM) has been recognized as a growing and disparate phenomenon with important implications for individuals, societies (Benson, O'Reilly 2009a, 2009b) and places (Hoey 2010). Michaela Benson and Karen O'Reilly (2009b: 612) defined LM in a broad, working definition as spatial mobility of “relatively affluent individuals of all ages moving either part-time or full time, permanently or temporarily to places which, for various reasons, signify for the migrants something loosely defined as quality of life.” Some examples of marginal mobility (Kalčić, Korpela, Rogelja this volume) could also be considered within the theoretical framework of LM, yet there are certain points where alternative perspectives can be added. One of the greatest shortcomings of the LM theory is its focus on mobile people from Global North only, which does not allow comparison with mobile subjects from other parts of the world.

guesthouses or nurseries. During the summers some of them work at festivals around Europe (Korpela this volume).

The trajectories of the mobile subjects of sedentary background presented here (by Juntunen, Kalčić, Korpela and Rogelja) differ from migratory movements (economic, asylum, returning and circular migration) that occur typically along more or less fixed routes, and also do not resemble temporary movements (usually taking place in a limited number of places) such as the movement of tourists or sabbatical travellers (Richards, Wilson 2009). These subjects seem to blur the existing concepts, sometimes resembling tourists and travellers but at other times resembling economic migrants and circular migrants. They are involved in constant⁸ and loosely patterned travel much like traditional peripatetic nomads (Berland, Salo 1986), yet the surrounding context of their lifestyles is that of global modernity.⁹

The mobility patterns of those with nomadic backgrounds (cf. Janko Spreizer, Kohl this volume) have also changed. *Ishumar*, a border-crossing generation of Tuareg, who are originally a pastoral nomadic society, no longer move in traditional nomadic cycles with their livestock, but according to individual choice. Their itinerant mobility between Nigeria, Algeria and Libya, sometimes expanded also to the EU, represents a peripatetic survival strategy created by changed living conditions aggravated by droughts, pollution and increased insecurity produced by international interferences guided by neoliberal economic interests in oil, gas, phosphate and uranium in the Sahara in Sahel region. In large parts of the Nigerian Sahara, nomadic pastoralist activities are no longer feasible for ecological reasons and owing to global economic interests. This is why younger generations of Tuareg have given up the pastoral nomadic life and in search of jobs have started to engage in transnational lifestyles between Saharan states (Kohl this volume). On the other hand, the mobility of traditionally peripatetic European nomads such as Travellers/Gens du Voyage or Gypsies/Roma had to adapt to the control situations imposed on them throughout history by repressive regimes, nation states and local communities. Historically marginalized as socially unacceptable and, being nomads, wrongly understood as people who are constantly mobile, their need for immobile platforms¹⁰ that make nomadic lifestyle possible was ignored, which contributed to diminishing of their mobility or sedentarisation (Janko Spreizer this volume).

In the current era, marked by the Global financial crisis and socio-political instability on one hand and the development of transport and communications technology on the other, it is in fact increasingly problematic to draw conventional distinctions between the actual mobile practices of Westerners versus (by general consensus work- or profit-searching) non-Westerners, as well as between “originally” sedentary or nomadic people regardless their geographic provenance in the Global North or South. Stating this however by no means means that one should be blind to their clearly unequal structural positions.

The ethnographic cases presented in this thematic issue speak about contemporary economic adaptations to challenges brought about by the globalised socio-economic and political situations of originally sedentary or nomadic people of the Global South and North using peripatetic nomadism

8 By “constant” we do not want to say that these people move without ever stopping. Rather we want to stress their enhanced mobility. For most nomadic populations relative levels of mobility and/or sedentarisation are not viewed as opposites. The states of being relatively mobile or static are perceived as particular strategies to be utilized as opportunities warrant and depend on specific conditions (Berland, Salo 1986: 4–5). This also holds true for the mobile subjects discussed here.

9 We use global modernity as a descriptive term that refers to globalized (neoliberal) capitalism and time-space compression through modern communications technology and travel (Giddens 1990; Castells 2000).

10 As discussed below, immobile platforms that enable temporary rests are a condition of nomadic mobility. Ostensibly sedentary activities among nomads such as the accumulation of real property such as land, houses or business establishments do not exclude mobility. While settling down for a time is always considered a possibility, most nomads continue to maintain a readiness for mobility as a viable alternative (Berland, Salo 1986: 4–5; Urry 2003: 126).

as their survival strategy.¹¹ According to Thomas Acton (2010: 7), nomadism is an economic, not an ethnic phenomenon,¹² while its peripatetic version occupies a distinct socioeconomic niche, which is according to Joseph Berland and Matt Salo (1986: 3) defined as “the regular demand for specialized goods and/or services that more sedentary or pastoral communities cannot, or will not support on a permanent basis”. As stated by Berland and Salo (1986: 3), the peripatetic “lifestyle and subsistence pursuit are a systematic response to a ubiquitous resource base”, and each case presented in this issue demonstrates a peripatetic adaptation to a lability or lack of a habitual resource base in the background society. In many areas across Western Europe, the global financial crisis struck the youth and elders hard regardless of their ethnic backgrounds (Erlanger 2012),¹³ and for many Westerners mobility has become a strategy of survival due to economic and existential crises, suppression and feelings of futurelessness with respect to the sedentary life in Europe (Kalčić, Korpela, Rogelja this volume). After the recession of 2008, several tens of thousands of Moroccan migrants in Spain have been forced to take up mobile lifestyles and engage in trade between Africa and Europe (Juntunen this volume). Mobility has always been a crucial factor in making a successful living in the Sahara and the Sahel. However, the recent forms of mobility among Tuareg in Niger go beyond moving with livestock and nomadism regulated through kinship structures. They have resorted to various strategies to overcome the ruptures, changes and modifications of their traditionally pastoral nomadic lives influenced by ecological and economical-political influences, among others to itinerant mobility between Saharan states. Peripatetic mobility across borders has replaced traditional cyclic pastoral mobility and has become a strategy for making a living in insecure times (Kohl this volume).

However, the mobile subjects representing each of these cases reveal that not only mobility and economic strategies but also conceptions concerning reasons to be mobile, relations with the background society, and the public spaces they traverse share similar features upon which it is possible to build a comparative analysis. While such comparison might seem unorthodox, it also cannot be denied that global fields are currently crisscrossed by the trajectories of mobile subjects whose movement challenges academic conceptualizations of mobility. In this regard we fully agree with Vered Amit and Nigel Rapport (2002: 34, 35), who have pointed out that economic globalization has changed the nature of the human mobility and blurred the conventional distinctions between various moving subjects.

The number of social analysts who take mobility seriously and highlight the fact that social lives in the Global era are characteristically mobile has steadily expanded (Sheller 2011: 1; Sheller, Urry 2006: 207). Lives spent on the move are everywhere outcomes of peoples’ responses to social, economic, political, and environmental factors that can occur on multiple levels of association from global to local

11 We want to stress that the nomadism of traditional nomadic groups (be it pastoral, hunter-gatherer or peripatetic) should not be confused with the peripatetic nomadism described here, which refers to a survival strategy and one of the common traits shared by the marginal mobile subjects. The main difference from the “classic” nomads arises from the social structures that organize these mobile people’s lives: the nomadism of traditional nomads is embedded in kinship while the mobile subjects that we refer to engage in nomadism as an individually chosen survival strategy.

12 Within the framework of Roman studies, where issues of nomadism have represented more or less permanent debate, Acton (2010: 8) challenged the culturalist conception which postulated Gypsy nomadism as a cultural feature and/or an ethnic, i.e. racial trait. By referring to the fact that only some Gypsies who live in mixed urban rural societies, where they may provide their services and certain skills, practise commercial nomadism, which is different from the “traditional nomadism” of hunter-gatherers and pastoral nomads (ibid.: 7), he defined nomadism as “the recurrent exploitation of spatially and temporally discontinuous economic opportunities” (ibid: 6). Once a certain place no longer offers opportunities for productive labour, movement is required. Thus, nomadism is particular form of exploitation of resources that are available in a particular territory and is based on circulation of individuals in the middle of social entities which organise access to this exploitation. It is an economic phenomenon which gives rise to culture, but it is not culturally inherent.

13 More than twelve million people are currently facing the threat of falling below the poverty line in the EU. According to EUROSTAT the highest percentages of population at risk of falling below the poverty threshold in the Euro area in 2011 were in Spain (21.8%), Greece (21.4%) and Portugal (18.0%) (EUROSTAT 2011).

(Bauman 1998). The common denominator for these mobile lives is that they are related to time and space compressing communications technology (Urry 2004). People are more aware of their relative position within the increasingly interconnected and networked global reality and are capable of imagining their lives elsewhere. Air travel is an opportunity available to an increasing number of people, widening the sphere of experience and enabling the maintenance of long-distance social relations. Images of success and achievement but also poverty and need are circulated, not only by media, but also by mobile subjects who expose others to the widening sets of meaning (Sheller, Urry 2006).

A central paradox of the present time however is that mobility has become a nearly compulsive part of career-building for educated professionals across the globe, but being on the move has also become a vehicle for “dropping out” (particularly among white Western subjects) from one’s professional career and to adopt an alternative life project, critical of the dominant norms of the society marked by neoliberal global capitalism (Bousiou 2008; D’Andrea 2007; Hetherington 2000; Kalčić 2012; Korpela 2009; Martin 2002; Rogelja 2012). While some take up mobility as a means to acquiring a more fulfilling life, for others movement is not necessarily a desired mode of being, but is rather about the search for a more secure and economically as well as socially sustainable life.

The people presented in the selected ethnographies are characteristically neither entirely free nor forced to adopt life on the road. Rather, they conceive themselves as being “pushed from behind” (Bauman 2001) in a variety of ways and marginalized by the background society. It is practically impossible to classify them under the conventional labels of mobilities as either voluntary (tourism, business travel) or forced mobilities (asylum migration or economic migrants in search of employment or improved economic position). In all six cases the criticism of the dominant norms of the background society is highly shared and accompanied by feelings of uprootedness and liminality.

The Moroccan migrants display a critical and embittered relation with the political and social order of their home society. Many perceive themselves as being completely disregarded and silenced by the official society, and commonly state that they have “no other choice” than to migrate. Particularly those with education and professional skills and thus legitimate claims to a decent social position portray Morocco as a corrupt and morally rotten society run by an elite circle that controls the key political, military and economic institutions. The majority rarely see constant movement as a desired way of being. Life on the road is a reaction to economic constraints, migration regimes and to the marginalization in the labour market (Juntunen this volume).

These mobile subjects also frequently express disappointment with regard to late capitalism. Not only in the abstract sense, but also through lived experiences as the citizens of states which are imposing norms and policies produced by the neoliberal ideology of global late capitalism.¹⁴ Existential crises involving the tension between subjective moral values and the perceived immorality of the social and economic policies within states of origin are common (Juntunen, Kalčić, Korpela, Rogelja this volume). In particular, younger age groups among housestruckers and liveboards perceive themselves as having been being deceived by the empty promises of their homelands, as they had experienced unemployment, blocked career paths and a precarious position in the labour market (Kalčić, Rogelja this volume). On the other hand, Westerners in Goa “often say that they wanted to escape a lifestyle that in their view is dull, meaningless and suppressive to their individual needs” (Korpela this volume). Yet, Korpela states

14 The processes of neoliberalization reach beyond Western neoliberal states. In Morocco the economic transformation dates back to early 1980s. The Economic crisis accompanied by the severing youth unemployment problem and frequent street riots were the major reasons for the palace’s decision to adopt IMF’s Structural Adjustment Programmes in order to boost economic growth. Liberalization and privatization of economy, reduction of public debt and promotion of direct investments and exports was largely implemented and met the interests of global corporations (Catusse 2009). In Niger European military interventions and US-strategies indicating the “War on Terror” camouflage the real international economic interests in oil, gas, phosphate and uranium of the Sahara region (Kohl this volume) and shape at large Tuareg’s everyday life under dictate of neoliberalism.

that "one can also argue that their options in their countries of origin may have been rather limited and moving abroad has thus been a rational choice which has clearly improved their income levels and quality of life" (ibid.). In fact, for those from more prosperous Western backgrounds, constant or regular movement is often portrayed as a positive experience and a conscious choice (Kalčić, Korpela, Rogelja this volume). However, it should be noted that, especially among liveaboards and housetruckers, over time the romantic and idealised visions of the mobile life tend to fade and people become more critical of the fact that mobile life includes sacrificing many of the comforts, secure routines and repetitive social rhythms of sedentary life (Kalčić, Rogelja this volume). Furthermore, transnational mobile lifestyles also involve vulnerabilities such as social "dropping out" in the form of loss of social security, regulated through the sedentary structures of one's background society (Korpela this volume). Rapport and Amit (2002: 37) have also noted that for Westerners uprootedness and liminality may sometimes appear as side products of the mobile lifestyle.

In the case of Tuareg *ishumar*, the route through the Sahara and border crossing between Saharan states among which they navigate "in search of making a fast buck" (Kohl this volume) often ends in a state of permanent liminality. Border crossers pass through three stages which lead them from their original environment into the new one: the first phase of separation detaches them from their homeland; the second, liminal phase of transition is embodied in the border crossing itself, where they are in a transitional state and space; and the third phase of incorporation, the process where they should be integrated into a new environment. Many *ishumar* cross the border without documents and never integrate into the new society, where they continue to be outsiders, while the return to the homeland is problematic as well. Thus in the new environment the *ishumar* occupy a social space marked by liminality and uprootedness that may never end (ibid.). In a similar way, the liminality of European Travellers/Gens du Voyage and Gypsies/Roma is embodied in the "mooring problem". Contrary to mainstream convictions, "moorings configure and enable mobilities" (Sheller, Urry 2006: 3) and are thus prerequisite for the nomadic lifestyle. John Urry defines nomadism as a constant mobility which also includes temporary rests, i.e. "moorings":

Temporary rest and replenishment are a condition of mobility. Overall it is the moorings that enable movements. And it is the dialectic of mobility/moorings that produces social complexity (Urry 2003: 126).

Throughout history, the mobility of European nomadic communities was controlled and regulated with the purpose of their sedentarisation. One of the strategies imposed on them by the Western European sedentary states was the provision of official campsites and on the other side the prohibition of unauthorised encampments outside of these sites. Such regulations contributed to a decrease in the nomadic way of life. Those who are still mobile today have to navigate among complex rules imposing a "sedentary norm" on their lives. In order to be able to fulfil their need for temporary rest and replenishment, outside of countries which provide campsites for nomadic people, they have to resort to expensive tourist infrastructures where they are often rejected due to the stigma accompanying their social identity. Thus they can find themselves in a liminal situation of permanent mobility without a possibility of stop and rest (Janko Spreizer this volume). In fact, the same problem is also faced by newly emerged European nomads living in housetrucks, who have to devise various strategies to evade the sedentary norm enthroned by the rules of the national state (Kalčić this volume).

BEING MARGINAL

The six examples of mobility in this issue deal with mobile survival strategies, i.e. livelihoods, which rely on mobility itself. They also rely on the evasion of the sedentary norm, which brings to the fore the subversive characteristic of mobility related to its capacity of changing perspectives on how things

are seen and done. In other words, they stress the fact that mobility is not solely a physical movement through space but also a mental one. As stated by Papastergiadis (2000: 11), “[m]ovement is not just the experience of shifting from place to place; it is also linked to our ability to imagine an alternative”. The philosophy of subversive mobility that enables an alternative is based in its inclination towards invisibility and apparent insignificance, which results in non-recognition and marginality. And vice versa: many contemporary mobile subjects have been marginalized but have turned their non-privileged position to their own good.

The notion of marginality stands in close relation to these mobilities. First, as social phenomena they have received only marginal interest among social science and humanities scholars. Second, the administrative and political debates on mobilities disregard the fact that the neoliberal states undergoing financial crisis “push” people from both the Global North and South to adopt *mobile* lifestyles. While much has been written about Western citizens who currently *migrate* to different areas because of the shock effect of unemployment, reduced social benefits and services and overburdening housing costs, there are very few contemporary accounts that focus on the fact that many people engage in peripatetic economic strategies that require nomadic movement in transnational space (Kalčić, Korpela, Rogelja this volume).¹⁵ A similar argument can be raised with regard to non-Western migrants, Africans among them, in the countries of economic migration gravity in the past (Juntunen, Kohl this volume). Those leaving e.g. Europe because of the current crisis are usually conceptualised as *returnees* to their countries of origin and their actual mobile practices that occur along shifting circuits of transnational movement are left largely unexplored. Third, these mobile subjects express being marginalised by their background societies. The inventiveness through which they exploit their marginal, i.e. in public life unrecognised and insignificant position, represents an important component of their lifestyle.

In the social sciences and humanities, marginality routinely refers to the outer limits of society and social acceptability but also to lack of social influence, often accompanied by stigmatization and disqualification by dominant social groups. In other words, the notion involves two frameworks, societal and spatial (Gurung, Kollmair 2005: 10), which evoke the ideas of social inequality and the (outer) boundaries of society. Many authors, particularly in geography, have established a strong link between marginality, poverty, vulnerability, lack of civil liberties, weak political representation, and uncertain future (Gurung, Kollmair 2005; Gerster 2000; Coudouel et al. 2004). This understanding about marginality is undoubtedly relevant in many different social contexts, yet detailed ethnographic case studies may bring to the fore serious challenges.

Sarah Green (2005: 2) among others has pointed out that marginality implies a difficult and ambivalent relation to the “heart of the things”. In her ethnographic study of the Pogoni region (Greek-Albanian border), marginality can be understood as the lack of particularity (ibid.: 13). In other contemporary ethnographic accounts of Greece (e.g. Herzfeld 1997; Serematakis 1991), marginality has been closely associated with accentuated otherness, resistance and social critique, together with claims to empowerment. Another option is to approach marginality as an in-between position rather than at the boundaries or peripheries. For Boon (1999), the essence of marginality lies in its un-identifiability. Such a view brings marginality close to Victor Turner’s (1974: 237) understanding of liminality as a “position between

15 While there is a large body of migration and transnationalism studies that explore such cases, they hardly ever deal with the process of mobility itself. Such accounts rather stress the integration processes at a certain location of migration (which we understand as a movement from one location to another and not as mobility itself, which we understand as movement which does not anticipate sedentarism even when in a moment of stillness; i.e. the moment of arrival to a certain location already implies the moment of departure, which anticipates constant mobility and a lifestyle “on the move”). Contemporary accounts of migration and transnationalism also do not challenge the paradigm of distinguishing between mobilities from the Global North and South, which fixes the identities of contemporary mobile subjects into unchangeable, static, culturally bounded and petrified figures (cf. Antoun 2005; Arthur 2010; De Bree et al. 2010; Ehrkamp 2005; Landolt 2001; Oeppen 2009; Portes et al. 2002; Sert 2012).

positions". In a similar way as "liminality", Turner (ibid.: 233) uses the term "marginality" to define the state of simultaneously belonging to two or more social or cultural groups. However, he also stresses the particular ambiguity of the marginal state, which he describes as permanent state of in-betweenness in contrast to liminality, which is a temporary state of being "betwixt and between".

The contextualisation of marginality with fluidity, ambiguity and the lack of boundaries underline the recent interest in marginality and its connection with the postmodern world in general. In this context a kind of postmodern marginality challenges modernity, as the postmodern dwells in uncertainty and a refusal of boundaries (Green 2005). He further develops these ideas by highlighting the fact that in-betweenness and ambiguity are associated with inventiveness and the possibilities of making something new out of making things uncertain (ibid: 4).

All these various aspects of the concept – marginality as accentuated otherness and difference manifested in the form of resistance, in-betweenness, inventiveness, being nothing in particular – are especially useful when we engage in a comparison of the mobile lifestyles presented in this thematic issue. They all communicate about a world of fluidity, ambiguity and uncertainty, but also about subversive inventiveness. As such, these mobile subjects are hard to put in any conventional mobility category, as in a similar way to Turner's marginals they very often belong to two or more social groups simultaneously (1974: 233). In fact, the marginality of these cases demonstrates a sameness arising from similar life strategies (Green 2005).

Unlike many contemporary migrant communities, the subjects of the present ethnographic studies almost never create politicized identities nor politicized public spheres, for the simple reason that they are constructed by individuals and small groupings that are constantly on the move and/or do not aspire to integrate into the host society. The social relations of these subjects have a fleeting and situational character; social weightlessness marks their relation with the social spaces they traverse.

Such identity processes have been explored by several scholars who propose that the period of "liquid modernity" (Bauman 2000), marked by accentuated and all-embracing mobility (Sheller, Urry 2006), provides opportunities for new kinds of group formations based on shared elements which may be activities, interests, beliefs or lifestyles (Amit 2002a; Amit 2002b; Amit, Rapport 2002; Bauman 2001; Delanty 2003). These formations are the outcomes of practices of people who are merely "conceptually connected". They do not necessarily imagine their personal commonalities in ongoing and ascribed collective identities (see Amit, Rapport 2002). Individuality plays a significant role in the construction of these temporary communities. They arise out of individuals' search for identity and personal fulfilment through collective participation (Amit 2002a: 16; Delanty 2003: 120–122). These communities are characteristically situational, fluid and composed by people with multiple and simultaneous attachments with several such groupings (Amit 2002b: 16; Delanty 2003: 131).

Economically marginal Moroccans (Juntunen this volume), Tuareg *ishumar* (Kohl this volume), mobile Roma/Gypsies, Travellers/Gens du Voyage (Janko Spreizer this volume), and Western mobile subjects (Kalčič, Korpela, Rogelja this volume) all create distinctively fleeting trans- and multi-national communities that are played out during temporary rests. They engage in a shared lifestyle on the move and exchange experience, information and solidarity. These mobile lifestyles arise out of global modernity which promotes, enables and generates an escape to an alternative *modus vivendi* and experimentation with new communal relations.

The peripatetic liveaboards (Rogelja this volume) interact frequently in unofficial marinas, as well as network with their fellow citizens on land, sharing information on proper anchorages and vital resources. Social interactions among housetruckers (Kalčič this volume) take place in shifting and occasional small groupings that simply happen to stop for a few days in the same places. Westerners in Goa create their own community based on face-to-face interactions, shared values, practices and lifestyle (Korpela this volume). Relationships among these Westerners are, however, dispensable, as solidarities within groups are first and foremost purely circumstantial. When individuals move on/away, they often maintain very few, if any, relationships with the people with whom they created a temporary community (Kalčič, Kor-

pela, Rogelja this volume). In the case of Moroccan men, the subjects display equal reliance on individual rather than group effort. The predominant social formation is groups of individuals who interact and get together, yet they are only linked through the fact that they share the same sentiments and motives for being mobile (Juntunen this volume). Border-crossing Tuareg too “do not form politicized public spaces, but merge through life often undesired, partly invisible, and they are always posed at the edge of social, ethnic and territorial boundaries” (Kohl this volume). As Kohl states, ties between *ishumar* and their kin are no longer as important as in the traditional society. They are often weak and loose ones, which “enable them to participate in many worlds without framing a community with fixed boundaries” (ibid.).

The world that we are living in is organised according to the sedentary norm. Citizenship and residence grant rights in terms of health care, social security, property ownership, employment, political and legal rights, personal documents, certificates and licences only to those individuals who fulfil this norm. Not living a sedentary life can cause the loss of these rights, and mobile people often bump into rules and regulations made up for sedentary populations, and face limits to their mobility imposed on them through sedentary-oriented official structures. The mobile subjects presented in the present thematic issue constantly balance their lives between two ends: on one hand it is beneficial to minimize the contacts with the bureaucratic institutions of the state, but in certain situations individuals may need official structures which also provide various benefits and services. For these reasons they devise various inventive strategies that arise out of their marginality/in-betweenness in order to either convince the state authorities that they are fulfilling the sedentary norm or simply evade it.

Together with indirect constraints on nomadic life in many EU countries, legislation directly delimits possibilities for mobility by setting restrictions on camping and mooring. As mooring and parking in official sites can cost several thousand Euros annually, housetruckers, liveaboards, Gypsies/Roma, and Gens du Voyage/Travellers usually stop in areas known for their relaxed bureaucracy, low fares or complete lack of attention of local authorities regarding their stay (Janko Spreizer, Kalčić, Rogelja this volume). The vehicles and boats that the mobile subjects use for housing are also required to fulfil strictly defined criteria regarding fuel consumption, water capacity, hygienic standards and insurance policies, and therefore many housetruckers and liveaboards improvise in order to bypass bureaucratic rules (Kalčić, Rogelja this volume). Outside of Europe, mobile Westerners face a much more relaxed bureaucratic culture; however, most of the countries in which they are moving require various documents such as personal entry visa, country specific car/boat insurance, and a special “pass through permit” for their mobile homes. As many live on extremely limited budgets they are highly motivated to learn how bureaucratic requirements can be loopholed in a cost-effective way (Kalčić, Rogelja this volume). Westerners in Goa consider themselves to live in Goa permanently, but according to the Indian state they are either visiting tourists or conducting temporary business and are thus forced to leave India regularly and travel to their home country in order to renew their visa. Their transnationally mobile life outside of kin and official structures leads to various kinds of vulnerabilities and forces them into negotiations with the existing rules of the world, which predominantly functions according to the sedentary norm (Korpela this volume).

For crossing the borders into neighbouring Saharan states, Tuareg *ishumar* need visas, too. They use the national ID cards and the passport system of the Tuareg-inhabited countries, and order these documents in all of these countries, but often with different names and birth dates. While many of them operate with multiple citizenships, others travel without any documents and cross the borders illegally (Kohl this volume). Currently, many marginal Moroccan migrants in Spain are encountering increasing economic difficulties due to the recession throughout the whole of Mediterranean Europe, and are obliged to return periodically to family and friends in Morocco for survival. A large number of these men have turned permanent EU residence and citizenship into means of broadening the space of the cultural ethos of *dabbar*, i.e. the ability to “arrange” survival strategies and social relations. In many cases involving unemployment and other benefits, these returns occur outside the knowledge of the Spanish authorities (Juntunen this volume).

INSTEAD OF A CONCLUSION

We think that it is very indicative that various mobile subjects currently construct their mobile lives in a highly comparable manner, and that the experiences of the mobile subjects of the six cases included here are all marked by a strong sense of psychic uncertainty and feelings of deception on the part of the neoliberal state. In fact, we think that these marginal mobile lives can be interpreted as the indications of the ways in which the political economy of the free market and privatization currently informs individual subjectivities. Together with our arguments we also insist that there should be room for telling the story of the comparability of contemporary mobile subjects across the globe that reaches beyond the traditional conceptualisations. This story is further elaborated through the six case studies in the present thematic issue, drawing on different aspects of marginal mobility. Let them speak for themselves.

REFERENCES

- Acton, Thomas (2010). Theorising Mobility: Migration, Nomadism and the Social Reconstruction of Ethnicity. *Romani Mobilities in Europe: Multidisciplinary Perspective*. Conference proceedings (ed. Nando Sigona). Oxford: Oxford University, Refugee Studies Centre, 5–11.
- Amit, Vered (2002a). An Anthropology without Community? *The Trouble with Community. Anthropological Reflections on Movement, Identity and Collectivity* (eds. Vered Amit, Nigel Rapport). London: Pluto Press, 13–65.
- Amit, Vered (ed.) (2002b). *Realizing Community. Concepts, Social Relationships and Sentiments*. London: Routledge.
- Amit, Vered, Rapport, Nigel (2002). *The Trouble with Community. Anthropological Reflections on Movement, Identity and Collectivity*. London: Pluto Press.
- Antoun, T. Richard (2005). Documenting Transnational Migration: Jordanian Men Working and Studying in Europe, Asia and North America. *Journal of the Royal Anthropological Institute* 14/1, 207–218.
- Arthur, John A. (2010). *African Diaspora Identities: Negotiating Culture in Transnational Migration*. Plymouth: Lexington Books.
- Basch Green, Linda, Glick Schiller, Nina, Szanton Blanc, Cristina (1992). *Nations Unbound: Transnational Projects, Postcolonial Predicaments, and Deterritorialized Nation-States*. New York: Gordon and Breach.
- Bauman, Zygmunt (1998). *Globalisation: The Human Consequences*. Cambridge: Polity Press.
- Bauman, Zygmunt (2000). *Liquid Modernity*. Cambridge: Polity Press.
- Bauman, Zygmunt (2001). *Community: Seeking Safety in an Insecure World*. Cambridge: Polity Press.
- Benson, Michaela, O'Reilly, Karen (eds.) (2009a). *Lifestyle Migration: Expectations, Aspirations and Experiences*. Burlington: Ashgate Publishing.
- Benson, Michaela, O'Reilly, Karen (2009b). Migration and the Search for a Better Way of life: a Critical Exploration of Lifestyle Migration. *The Sociological Review* 57/4, 608–625.
- Berland, Joseph C., Salo, Matt T. (1986). Peripatetic Communities: An Introduction. *Peripatetic peoples. Nomadic Peoples*, Special Issue 21/22.
- Boon, James (1999). *Verging on Extra-Vagance: Anthropology, History, Religion, Literature, Arts... Showbiz*. Princeton: Princeton University Press.
- Bousiou, Pola (2008). *The Nomads of Mykonos. Performing Liminalities in a 'Queer' Space*. New York, Oxford: Berghan Books.
- Castells, Manuel (2000). *The Rise of the Network Society. The Information Age: Economy, Society and Culture Vol. 1*. Cambridge, MA; Oxford, UK: Blackwell.

- Catusse, Myriam (2009). Morocco's Political Economy: Ambiguous Privatization and the Emerging Social Question. *The Arab State and Neo-Liberal Globalization: The Restructuring of State Power in the Middle East* (eds. Laura Guazzone, Daniela Pioppi). Reading, UK: Ithaca Press, 185–216.
- Coudouel, Aline, Hentschel, Jesko S., Wodon, Quentin T. (2004). Poverty Measurement and Analysis. *World Bank Poverty Reduction Strategies (PRSP)*, sourcebook, 27–74.
- D'Andrea, Anthony (2007). *Global Nomads. Techno and New Age as Transnational Countercultures in Ibiza and Goa*. New York: Routledge.
- De Bree, June, Davids, Tine, De Haas, Hein (2010). Post-return Experiences and Transnational Belonging of Return Migrants: a Dutch and Moroccan Case Study. *Global Networks* 10/4, 489–509.
- Delanty, Gerard (2003). *Community*. Oxon: Routledge.
- EUROSTAT (2012). At Risk of Poverty Rate by Poverty Threshold, Age and Sex, http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ilc_li02&lang=en (2 Dec. 2012).
- Gerster, R (2000). *Alternative Approaches to Poverty Reduction Strategies*. SDC Working Paper 1/2000, Bern, Switzerland.
- Ehrkamp, Patricia (2005). Placing Identities: Transnational Practices and Local Attachments of Turkish Immigrants in Turkey. *Journal of Ethnic and Migration Studies* 31/2, 345–364.
- Giddens, Anthony (1990). *The Consequences of Modernity*. Cambridge: Polity Press.
- Hetherington, Kevin (2000). *New Age Travellers. Vanloads of Uproarious Humanity*. London: Cassel.
- Green, Sarah (2005). *Notes from the Balkans. Locating Marginality and Ambiguity on the Greek-Albanian Border*. Princeton: Princeton University Press.
- Gerster, Richard (2000). *Alternative Approaches to Poverty Reduction Strategies*. SDC Working Paper 1. Bern, Switzerland.
- Gurung, Ghana S., Kollmair, Michael (2005). *Marginality: Concepts and their Limitations*. IP6 Working Paper Series 6, <http://www.nccr-pakistan.org/publications.html> (19 Aug. 2010).
- Herzfeld, Michael (1997). *Cultural Intimacy: Social Poetics in the Nation-State*. New York: Routledge.
- Hoey, A. Brian (2010). Place for Personhood: Individual and Local Character in Lifestyle Migration. *Midwestern City & Society* 22/2, 237–261.
- Juntunen, Marko, Kalčić, Špela, Rogelja, Nataša (forthcoming). Mobility, Marginality and the Global Economic Recession. Western Nomads and Mobile Moroccan Men. *Nordic Journal of Migration Research*.
- Kalčić, Špela (2012). The Ethnography of Housetrucking in West Africa: Tourists, Travellers, Retired Migrants and Peripatetics. *Dve domovini/Two Homelands* 36, 101–118.
- Kohl, Ines (2007). *Tuareg in Libyen. Identitäten zwischen Grenzen*, Berlin: Reimer.
- Kohl, Ines (2009). *Beautiful Modern Nomads: Bordercrossing Tuareg between Niger, Algeria and Libya*, Berlin: Reimer.
- Kohl, Ines (2010a). Modern Nomads, Vagabonds, or Cosmopolitans? Reflections on Contemporary Tuareg Society. *Journal of Anthropological Research* 66/4, 449–462.
- Kohl, Ines (2010b). Saharan “Borderline”-Strategies: Tuareg Transnational Mobility. *Mobility, Transnationalism and Contemporary African Societies* (ed. Tilo Grätz). Newcastle upon Tyne: Cambridge Scholars Publishing, 92–105.
- Kohl, Ines (2010c). Libya, the “Europe of Ishumar”: Between Losing and Reinventing Tradition, *Tuareg Society within a Globalized World: Saharan Life in Transition* (eds. Anja Fischer, Ines Kohl). London, New York: I.B. Tauris, 143–154.
- Korpela, Mari (2009). *More Vibes in India. Westerners in Search of a Better Life in Varanasi*. Tampere: Tampere University Press.
- Martin, Greg (2002). New Age Travellers: Uproarious or Uprooted? *Sociology* 36/3, 723–735.
- Landolt, Patricia (2001). Salvadoran Economic Transnationalism: Embedded Strategies for Household Maintenance and Immigrant Incorporation. *Global Networks* 1/3, 217–41.
- Oeppen, Ceri (2009). *A Stranger at Home: Integration, Transnationalism and the Afghan Elite*. PhD thesis. Brighton: University of Sussex.

- Papastergiadis, Nikos (2000). *The Turbulence of Migration. Globalisation, Deterritorialisation and Hybridity*. Cambridge: Polity.
- Portes, Alejandro, Guarnizo, Luis Eduardo, Landolt, Patricia (1999). The Study of Transnationalism: Pitfalls and Promise of an Emergent Research. *Ethnic and Racial Studies* 22/2, 217–237.
- Richards, Greg, Wilson, Julie (2009). *The Global Nomad. Backpacker Travel in Theory and Practice*. Clevedon: Channel View Publications.
- Rogelja, Nataša (2012). Liveaboards in the Mediterranean: Luxury or Marginality? – Ethnographic Reflections on Maritime Lifestyle Migrations. *Dve domovini/Two Homelands* 36, 119–130.
- Serematakis, Nadia (1991). *The Last Word: Women, Death, and Divination in Inner Mani*. Chicago: Chicago University Press.
- Portes, Alejandro, Haller, William J., Guarnizo, Luis Eduardo (2002). Transnational Entrepreneurs: An Alternative Form of Immigrant Economic Adaptation. *American Sociological Review* 67/2, 278–98.
- Sheller, Mimi (2011). Mobility. *Sociopedia.isa*, Drexel University.
- Sheller, Mimi, Urry, John (2006). The New Mobilities Paradigm. *Environment and Planning* 38, 207–226.
- Smith, Michael Peter, Guarnizo, Luis Eduardo (eds.) (1998). Transnationalism from Below. *Comparative Urban and Community Research*, Special Issue.
- Turner, Victor (1974). Liminal to Liminoid in Play, Flow, and Ritual: An Essay in Comparative Symbolology. *Rice University Studies* 60/3, 53–92.
- Urry, John (2003). *Global Complexity*. Malden, MA: Blackwell.
- Urry, John (2004). Small Worlds and the New 'Social Physics'. *Global Networks* 4/2, 109–130.

ARRANGING MOBILE LIVES: MARGINALISED MOROCCAN MEN IN TRANSNATIONAL SPACE

Marko JUNTUNEN¹

COBISS 1.01

ABSTRACT

Arranging Mobile Lives: Marginalised Moroccan Men in Transnational Space

The article traces, by means of extended ethnographic participant observation, the cultural construction of a particular type of male marginal mobility, namely that of economically marginalised Moroccan migrant men. For these men, the departure from Morocco as irregular migrants to Europe appeared as a means to escape a life without a horizon. They faced lethal dangers during their journeys across the Strait of Gibraltar in small open boats, and Spain appeared unwelcoming to them, since the traditional sector of migrant labour, industrial work, could no longer absorb them. These men had very few other options than to invest in transnationalising the distinctive ethos of *dabbar*, i.e. 'arranging' survival strategies and social relations in the unregulated and lowest echelons of the labour market in Spain. For a large number of these Moroccans, permanent EU residence and citizenship turned into means of broadening the sphere of *dabbar*. Many of these men currently engage in transnational trading activities of second-hand goods, including small electronic devices, shoes and clothes and household utensils.

KEYWORDS: transnational mobility, irregular migration, Morocco, survival strategies, economic marginalization

IZVLEČEK

Urejanje mobilnih življenj: Marginalizirani Maročani v transnacionalnem prostoru

Članek s pomočjo obsežne etnografske raziskave opazovanja z udeležbo zasleduje kulturno konstruiranje posebnega tipa moške marginalne mobilnosti, in sicer mobilnosti ekonomsko marginaliziranih Maročanov. Kot ilegalnim migrantom jim odhod iz Maroka v Evropo pomeni beg od življenja brez perspektive. Med potjo preko gibraltarske ožine se na majhnih odprtih čolnih srečujejo s smrtonosnimi nevarnostmi, v Španiji pa, kjer jih tradicionalni sektor migrantskega dela v industriji več ne absorbira, se ne počutijo dobrodošle. Ti možje niso imeli druge možnosti, kot v transnacionalizacijo vložiti posebne vrste etos, imenovan *dabbar*, tj. v »urejanje«¹ preživetvenih strategij in socialnih vezi v nereguliranih in najnižjih ešelonih španskega delovnega trga. Za večino omenjenih Maročanov sta stalno bivališče v Evropski uniji in državljanstvo postala sredstvo za razširitev sfere *dabbarja*. Mnogi med njimi so trenutno angažirani v transnacionalnem trgovanju z rabljeno robo, *khurda*, ki vključuje malo elektroniko, čevlje, oblačila in gospodinjske pripomočke.

¹ Assistant Professor of Social Anthropology; University of Tampere, School of Social Sciences and Humanities, Lina Building, FI-33014 University of Tampere, Finland; marko.juntunen@uta.fi.

KLJUČNE BESEDE: transnacionalna mobilnost, ilegalne migracije, Maroko, strategije preživetja, ekonomska marginalizacija

INTRODUCTION

This article is based on extended ethnographic fieldwork conducted between 1998 and 2012 in Northern Morocco and in various migrant contexts in Spain. The project, which began in the province of Larache on the Northern Atlantic coast of Morocco, led me over the years to the suburbs of Barcelona and Madrid, to greenhouses in El Ejido and Nijar and to bars and cafés frequented by Moroccans throughout Mediterranean Spain. Like the men whom I studied, I engaged in circular but loosely patterned travel with frequent stopovers in order to exchange information and search for contacts. Just like my interlocutors, I made constant visits back to the original “home community” in Larache. My aim in this article is to construct an ethnographic narrative reflecting the ways in which my interlocutors generated, through their everyday practices, a specific type of marginal mobile lifestyle.

The increasingly restrictive migration and border policy in the EU, together with the economic recession beginning in 2008, have had far-reaching consequences on the patterns and the cultural logic of transnational mobility in the transnational space between Morocco and Spain. It has become difficult to conceptualise these Moroccan men’s mobile lifestyles in the conventional analytic terminology of migration and mobility studies. Instead of ‘migrants’, my ethnographic material speaks of various types mobile figures: hawkers, drifting street vendors, migrant smugglers, refuse collectors, contraband dealers, petty drug dealers, occasional agricultural labourers, all of whom are constantly on the road in order to survive. Some men, like Aziz, a 26-year-old petty cannabis dealer whom I met in Tangier in June 2012, had been deported from EU territory twelve times. He was once again ready to test his luck crossing the Strait of Gibraltar hidden in a passenger ferry, simply because he thought it is better to beg in Europe than in Morocco.

The characteristic features of these men’s lives are the constant movement back and forth between the continents and the readiness to explore of new worlds while making only occasional visits to the home community in Morocco. In the post 9/11 climate, Spain appears to them to be an increasingly securitized and unwelcoming society, while on the other hand EU passports and the Schengen area have opened new opportunities to broaden their economic opportunities for survival.

The term ‘marginal mobility’ is appropriate to describe the life-worlds of these men, not only because of their constant movement and survival on the margins of the economies in Spain and Morocco, but because of their cultural uprootedness and specific feeling of *ghurba*, ‘foreignness and alienation’, in both Morocco and Spain (see e.g. Juntunen 2002: 70–85). What we have at hand is a mobile lifestyle of people who are highly critical of their assumed social position as “underclass” in Morocco and as “migrants” in Europe. Their reaction to alienation is to ‘arrange’, i.e. *dabbar* their lives as best as they can in the fluid transnational space. Mobility for them is not a rational career choice but a response to the fact they are not willing to put up with sedentary life in Morocco or in Spain.

Below I will first familiarize the reader with the social and cultural context of migrant smuggling in which my interlocutors were first introduced to the circuits of transnational mobility between the years 1995 and 2000. Then I will offer insights into their experiences of travel, mobility, work, and sociability as irregular migrants Europe. Finally, I will trace the ways in which obtaining an EU passport (which in the case of most of my interlocutors occurred between 1998 and 2004) widened their possibility to engage in transnational survival strategies.

LARACHE: A COMMUNITY SHOT THROUGH WITH MIGRATION

When I began my field work in 1998 my initial aim was to learn about the lives of the prospective candidates for irregular migration, namely young economically marginalized Moroccan men. Larache, a town of 120,000 inhabitants on the Northern Atlantic coast of Morocco, some eighty kilometres south of the Strait of Gibraltar which separates Morocco from Spain, proved to be an ideal setting. The province of Larache had experienced a rapid increase in the number of cases of migrant smuggling to Spain since the mid-1990s. In fact the area was known according to popular Moroccan stereotypes as part of the 'Land of Migrant Smuggling' (*Bilad Harraga*), the coastal area stretching from the Northern Atlantic shores of Kenitra to the easternmost points on the Mediterranean coast of Morocco.



Figure 1: Youngsters from the Hayy al Jadid quarter in Larache, Morocco (Photo: Marko Juntunen, 1998).

A large majority of the men whose transnational lives I ended up following for over a period of fourteen years represented the first urban-born and fully literate generation in their families, who traced their history to the rural areas surrounding the town. They had taken up employment in their early teens as apprentices in garages, workshops, small industries and construction sites, but in 1998 they all faced either extended periods of underemployment or unemployment. Most of my interlocutors were bachelors between 20 and 33 years of age, who still resided in their parental households in quarters in which "every household has a migrant in Europe" as Muhsin, one of my first acquaintances, characterized the research setting. The few married men whom I came to know occupied sheet metal huts attached to their parental homes. The majority survived off petty street commerce, occasional manual work and by providing a variety of services and know-how to neighbours and kin. Many were also engaged in serving as middlemen for migrant smugglers or did occasional contraband trafficking of household goods and small electronic goods from the Spanish enclave of Ceuta to other locations in Northern Morocco.

Whether prospective or actual migrants, these men shared a highly homogenous view regarding the surrounding social and economic realities on both sides of the Strait of Gibraltar. When talking about the labour market in Europe and Morocco, bureaucracy, migrant regimes, local politics, and economic strategies of survival, the men conveyed an image that for young men the only possibility to make their living required the ability to 'arrange' (*dabbar*) their livelihood as best as they could. "In these times, money is everything", or "Who thinks about morals anymore? Everyone is just after their own interests" were idiomatic expressions which I heard repeated dozens of times as I engaged in the first discussions with my interlocutors.

In addition to *dabbar*, another notion was constantly present in our everyday conversations. They spoke about their *duruf*, or 'circumstances and general conditions of life'. It is characteristic of the underclass, they told me, to live in *duruf* which are always "unsettled", which sometimes "ascend and other times collapse". When referring to the more affluent migrants or members of the community in Larache, their *duruf* in contrast often appeared as characterized by attributes such as "settled" or "preferable" or "open to multiple options" or perhaps "good", "improved" or "relaxed".

In this setting both men and women spoke of 'my *duruf*', however in a highly gendered manner. A woman's *duruf* always emerged directly linked to a man's ability to provide. It was the man's responsibility to provide a living for his wife and to ensure that the women of the household are protected. In the urban underclass context, women's wage work outside the home did not itself compose a threat to a woman's reputation. However, both men and women perceived that certain jobs by definition indicated that a woman's *duruf* did not protect her from possible physical interventions by her male superiors. Working as a cleaner, housemaid, or agricultural labourer not only made a woman vulnerable – it in fact indicated that her *duruf* is in such a state that she has had to take such a job in the first place. In short, the less respected were seen so because they had to *dabbar* their living by methods which are considered to create a stigma. In some jobs, the young men perceived, it is impossible for a woman to preserve her honour (*sharaf*). For these reasons single women migrants were very often perceived as morally lax. Their economic success was perceived in a very different manner from that of successful young men. For a young man wealth gained through migration was seen as a proof of his masculine capabilities to provide; in a similar situation young women were usually assumed to have engaged in stigmatizing professions (such as housemaids, bartending or prostitution). In fact, single women migrants in the late 1990s in the context of Northern Morocco were usually widows, divorcees or orphans (Ramírez: 1998).

The engagement of young men in transnational mobility by means of irregular migration in this cultural context was an attempt to arrange one's *duruf* in a single blow. These themes – *dabbar*, *duruf* and *Harraga* (irregular migration) – as I came to understand, proved to be extremely important notions when attempting to get to grips with the ways in which these men were to construct a specific form of mobile masculine lifestyle over the following years. Studying irregular migration thus required a gender-sensitive perspective. First of all, irregular migration seemed to follow a very patterned ritualized plot, which was to a great degree organized around male bodies. Migrants boarding open boats for Spain were predominantly young, socially marginal and unmarried men (*shabab*), not quite complete men (*rijal*). They were expected to return with signs of material success – in cars packed with gifts for family members and friends. Young men very often aspired to turn the wealth gained through migration into capital in the sexual arena. I witnessed how over the summer holiday period a number of cafés in the centre of L'araish turned into central meeting points between the migrant young men and the resident women of the town. For some, migration and access to economic resources was soon followed by marriage, establishing a family and building a house – a landmark of the individual success story – in L'araish.

Abdel Ali, back then a 29-year-old unemployed construction worker, expressed the close interrelation between masculine subjectivity, socioeconomic conditions, the ability to arrange his life and international mobility:

[Your] mother gives you that "look". Not because she feels hatred but because she wants to see you being a man and helping your father. What does she say? She says, 'Other people's sons have all migrated and arranged for themselves [dabbaru 'ala rashom] but you are still here with us.' So you feel pressed and bothered because your mother said these words. You say (to the mother), 'Dabbar the money for me so that I can go with the migrant smugglers.' But you do not find enough money to go. And this fact creates the knot in yourself and these words remain recorded in your memory like on a cassette.

THE CULTURAL LOGIC OF MIGRANT SMUGGLING

Since the beginning of the 1990s, the urban spaces in Northern Morocco witnessed tremendous social and economic changes, largely resulting from migration and particularly the smuggling of migrants to Europe (Al-Qabab: 1998). New economic opportunities were made available to thousands of young men thanks to the growing social influence of migrant smuggling and other forms of international migration. Numerous economically marginalized men began to serve as middlemen for migrant smugglers, to arrange official or forged documents for prospective migrants, to offer translation services, to provide links to civil servants and the security forces and to serve as vehicles of information concerning opportunities to migrate. Migration also brought about vast changes in the housing sector, construction, real estate and the land market all over Northern Morocco. As migration became ever more difficult to realize towards the turn of the millennium and required more courage, physical stamina and determination, it created new competition for material wealth and social prestige.

This new mobility was largely detached from the destinations and the logic of movement of earlier generations of Moroccans in Western Europe (Ogden 1991: 305). Instead of targeting France, Germany, the Netherlands and Belgium, all popular destinations among the labour- and chain migrants of the 1960s and the 1970s, the new migrant men perceived the booming construction and agricultural sectors in Spain as preferable destinations (Lopez Garcia 1996: 73). Citrus farms in Alicante and Murcia, greenhouses in Almeria and construction sites in Catalonia attracted thousands of Moroccans, particularly from the north of the country. The migration routes were part of a shared social memory distributed through informal networks. It is common in Morocco that the migration flows of neighbouring regions and even towns find largely different destinations (see e.g. Salih 1996). In this reality, informal social networks offered the only means to contact migrant smugglers and to acquire the essential official or forged documents that were necessary for international mobility. The market connected with migrant smuggling expanded rapidly in the area throughout the 1990s and constructed a new social and economic linkage reaching across the Strait of Gibraltar (see e.g. Driessen 1998; Sørensen 2000).

The smuggling of migrants across the Strait of Gibraltar was based in Larache on flexible and constantly changing networks of male 'boat owners' (*mul*), professional 'captains' (*rais*), and intermediaries (*semsar*), as well as a number of 'subcontractors' (*mdabbar*) whose main responsibility was to 'arrange' (*dabbar*) deals between potential candidates for migration and the smugglers. Over the years I came to know several men who occupied different roles in this underground economy: Abdessalam from Larache's historic centre, an experienced fisherman, began to organize three to four migrant smuggling trips annually from the coastal areas around Larache to Barbate south of the Gulf of Cadiz in Spain. His captain L'arbi was known as a skilful and trusted seaman. Mustafa, a construction worker from Tangier, offered occasional lodging for prospective migrants outside of the province in his brother's house in one of Larache's many shantytowns.

The men's individual experiences varied greatly with regard to actually embarking on the journey to Europe. Those who financed their journeys with family members' or relatives' financial help rarely left without informing their households, while it was not uncommon to hear of men who simply left without notice when a promising opportunity appeared.

Family, kin and neighbours with their social networks often facilitated migration by providing economic possibilities and the necessary social contacts to smugglers and their middlemen. Members of the family, kin and quarter (*hawma*) also often provide the first accommodation and opportunities for wage labour in Spain. Yet there was no fixed pattern to these forms of aid and assistance. Family and kin in the context of irregular migration were domains loaded with expectations, differing interests and competition for economic and symbolic capital. Throughout the years of my fieldwork, the international L'araishi community and its composite families were by no means free of tensions – on the contrary, the lack of a common incentive was often its most audible element, at least in discussions with young men still waiting for their chance to cross over to Europe. Irregular migration generated new expectations, demands, disagreements and disputes within the family and kin. The patterns of help facilitating actual migration between Morocco and Spain seemed to “radiate” from elder brother to younger brother (or half brother) or to unmarried and divorced sisters, from husband to his wife and children to his sister’s husband and to a man’s own parents. In the case of more distant relations the favours usually required money. One of my informants, ‘Abdel ‘Ali, had asked for financial help several times from both his paternal and maternal uncles and cousins residing in Spain and Italy in order to finance his irregular migration, but they had continuously refused their help. ‘Abdel ‘Ali assumed that they were afraid that a newcomer would prove to be a more successful worker than the older migrants. They, he explained, “always have to stay above you”. He assumed that if he just managed to arrive in Spain the family members simply could not refuse their help.

Some of my interlocutors made three to four extremely risky and costly attempts (up to €2000) to reach Spain; with migrant smugglers, hidden in passenger boats thanks to their contacts with personnel in Tangier’s harbour, underneath tourist buses, or hidden in lorries conveying agricultural products. While some had exhausted their financial resources and given up their hopes of migration, others with more luck and economic success kept the illusion of migration alive.

If the open wooden boats (*pateras*) used by the local smugglers were intercepted by the Spanish or Moroccan Coast Guard, the owners such as Abdessalam could always claim that their boats had been stolen. Often, the captain received his share of the profit only after bringing the boat safely back to home port. Several men indicated that after reaching the Spanish shore the boat had been abandoned on the shore and the captain had joined his clients and begun to organize his journey further. It was often impossible to make a categorical separation between smugglers and smuggled (and victims and exploiters), as in many cases the young men were offered a free trip or a considerable discount after working as a subcontractor for a particular middleman.

In Spain, the chances of the migrant men reaching their desired destination depended largely on their social relations with fellow Moroccans in Spain. After reaching the Spanish territory people began to arrange transportation in order to continue their journeys. Those with better resources managed to purchase costly “package deals” in Morocco and were transported by Moroccan smugglers operating in Spain to Almeria, Madrid, Barcelona and further. Others had agreed to contact relatives and friends in Spain after the arrival and were in many cases picked up by private cars from the roadside along the southern coastal areas. The fortunate ones reached their target destinations relatively securely and had accommodation and work waiting for them. The most unfortunate were those who mistakenly travelled underneath trucks or buses in the opposite direction to the intended one. Many had no other choice than to hitchhike and walk hundreds of kilometres in order reach their target destinations; the greenhouses of Almeria or citrus farms of Valencia and Murcia. Thousands were caught hitchhiking on the roadsides by the Spanish Guardia Civil and deported to Morocco. Some of my interlocutors told me that they were handcuffed and brought back to Morocco on an ordinary passenger ferry. At the Spanish – Moroccan frontier in Ceuta they were handed to Moroccan authorities who led them to a court hearing in Tetuan. The men routinely received a fine of €50 to 100 and it was not exceptional to hear of those who had to beg for money in order to return home.

IN SPAIN

The newcomers in Spain lived in constant fear of deportation. One had to remain mobile and to participate in public spaces in order to find work, yet it was understood to be risky. Many men I met had been stopped dozens of times by the police or the civil guard. Regardless of the constantly changing legal conditions regarding their deportability, the men knew that they had to improvise new strategies for reducing the risk of deportation; at the turn of the millennium the Moroccan men I met in Barcelona and its vicinity told me that it was preferable to claim to be Algerian, since no forced returns were carried out to the war-torn country.

Without exception the men took precarious jobs in the lowest echelons of the Spanish labour hierarchy in agriculture, refuse collecting, street vending, restaurants and construction sites and street maintenance work. As an irregular migrant it was simply obligatory to remain mobile and accept nearly any opportunity for wage work. My contacts included some men with university degrees who told of having had to take the same jobs as illiterate and unqualified men.

Rachid Nini is a highly acclaimed Moroccan journalist with personal experience as an irregular migrant in Spain in the mid-1990s. In his autobiographical novel *Diario de un ilegal* he views the general disregard – in both Morocco and Spain – of the young men's academic qualifications in the following manner: "If you happen to obtain a PhD in Morocco you can wipe your ass with it in a public toilet. Those who never studied decide your fate in the parliament. [...] Your certificates have no value if you do not learn how to make pizza. Pizza is more important than PhD" (Nini 2002: 68).

Some men told of spending several days without food or money and turning to charities and churches for shelter. Others had no choice but to resort to drug dealing, begging, pick-pocketing and shoplifting for survival. Those without family members in Spain sought housing in squats or resorted to fellow Moroccans with residence permits and officially rented apartments. In Terrassa in Catalonia, many Moroccan newcomers I encountered lived with up to six to seven others (usually young men from their town, often from the same quarter) in a flat rented by a Moroccan tenant with a residence permit.

Their travel trajectories were largely shaped by the necessity to find work and income. The men were armed with popular knowledge distributed by fellow Moroccans regarding places and areas under surveillance of authorities and considered "difficult", and thus to be avoided.

DABBAR IN A TRANSNATIONAL SETTING

The experiences of the men during their first years in Spain had numerous shared features. The precarious labour market position and deportability constructed a social world characterized by mutual competition for jobs and shelter (see e.g. Yaghmaian 2005). Once again, individual success was largely dependent on the ability to *dabbar*. A number of themes were constantly repeated in the men's narrations concerning work: the bosses are self-centred and utilize open employment contracts for their own gain, while the workers have to endure hard conditions (*duruf*) and have very little to say concerning the content of the work.

The nature of the relation between the bosses and the workers is captured very well in a common sentence used frequently by my interlocutors. The worker either accepts the terms set by the bosses or has to leave and "arrange his life in whatever way" (*dabbar rasu b-ayy tariqa*).

However, during my various periods of field work in Larache, in Almeria's greenhouses and in Barcelona's and Terrassa's migrant quarters, I noticed that such a bleak image – the harshness of the *duruf*, and the greed of the wealthy – was only the first surface level of the men's narrations concerning work. Only later did other aspects become clear: it is important that the ability to endure the harsh working conditions, to take punches honourably and to gain recognition through one's toughness and thus ascend towards a more respected male image are vital and constantly repeated tests of manhood (see e.g.

Vale de Almeida 1996; Gilsenan 1996). The ability to withstand hardships is translated into a source of personal integrity and honour – this also at least partly explains why the working conditions of migrant men are described as “inhumane”. Taking punches honourably becomes a source of prestige.

Another issue became gradually clear: the men created mechanisms of social arrangement to counter the unfair exchange between the bosses and the workers (or any master-subordinate relation). This is to a large extent what *dabbar* was about. Under closer scrutiny, however, the men seemed to attach three clearly different sets of contextual meanings to the concept of *dabbar*. First, the term refers to finding flexible and mobile methods (often occasional) for making money outside of the formal economy. In this sense the concept is morally neutral. For example, on many occasions when we talked about youngsters who engaged in the transnational trade of drugs or pick-pocketing, my companions would explain that these people “have no option, they have to ‘arrange themselves’ (*dabbar rasu*) because of their *duruf*.” Secondly, the notion referred to providing connections, goods and capital, services and contacts for others. One can, for example, ‘arrange work for a friend’ (*dabbar lu khedma*) but also occasional female company (*dabbar lu bint*). Thirdly, *dabbar* referred – in a clearly negative sense – to utilizing publicly condemned methods to gain material benefits (e.g. tricking, stealing, lying). Due to the openness of the concept, *dabbar* appeared as an object of constant contextual negotiation. One’s own conduct was very unlikely to be translated as the third type of *dabbar*.

There is something that unifies all three different sets of meanings: they are all based on rhetorical skills, on imposing one’s interpretation of reality on the other party. Cunning and trickery are often expressed by economically marginalized men as part of the national character of Moroccans, and the notion is widely present in numerous works of the popular writers of realistic fiction in Morocco, such as Mohamed Choukri, Larbi Batma and Mohamed Zifzaf. On one occasion, ‘Umar, a car painter, declared that the Moroccans have “cleverness that no other nationality can challenge”. Similarly, Muhammed, a second-hand dealer, told me one day that “there is work everywhere, even in Mozambique. A Moroccan can *dabbar* work anywhere he wishes.” The mobile migrant men had clearly transnationalised the notion of *dabbar*.

MOBILE LIFE WITHOUT PAPERS

The years without papers inside the Spanish territory was a period full of social tensions not only between bosses and workers but between fellows sharing similar dreams for the future and the everyday struggles for survival. In the men’s narrations, morality related to the equality of distribution, the fairness of exchanges and generosity. I was repeatedly told that it was extremely difficult to escape the vicious circle; everyone was in many ways indebted to others after receiving information, shelter and money for food and cigarettes from others. As soon as a young man managed to find more permanent work and was prepared to send money home to elders and family members he was immediately surrounded by increasing expectations to assist his fellows in need.

These conditions did not allow the formation of durable group formations or cooperative initiatives among the men. These men were characteristically highly indifferent towards coordinated political group action to further their causes. Established civic organizations such as *Asociación de Trabajadores Inmigrantes Marroquíes en Espana* (ATIME) were generally seen as reflections of Moroccan political culture, and run by more prosperous migrants detached from the social reality of the irregular migrants.

Largely because of the precarious situation on the labour market, the constant mobility searching for periodic work, the insufficient work conditions, the discipline and discrimination exercised by the employers, together with the tensions related to reciprocation of help, there was a high emotional readiness among the men to try one’s luck elsewhere. Whether the meetings took place in Larache, Almeria, Barcelona or somewhere else, I was surrounded by men whose dreams for the future rested in Germany or the Scandinavian countries, while others thought that life in London or Montreal would work out bet-

ter. One of my interlocutors, Hasan, offered me some pages of his diary entries written during his years without papers in Spain in the 1990s. He described his feelings: “I have travelled 1000 miles to better myself to find a suitable environment to escape the psychological illness that exists in my society. I wish to find an island where people cannot reach, to be a friend of elephant and rabbit, to build a bungalow to live there forever. I’d like to be a star – far from human harm.”

REGULARIZED MIGRANTS

After a strenuous bureaucratic struggle, nearly all of my interlocutors managed to legalize their stay in Spain in the national regularization processes which occurred between 2000 and 2005. By 2004 the smuggling of migrants on *pateras* had slowed down considerably and the migration market was largely frozen as the Spanish – Moroccan frontier had become increasingly technologised, monitored and enclosed. With this development, the required documents in these processes, such as work and residence permits, transformed into marketable goods. In the summer of 2004 several Moroccan owners of small construction businesses in Terrassa returned to Larache and began to sell work contracts, demanding up to €4000 per document. In a similar vein, Spanish tenancy agreements were transformed into valuables and objects of *dabbar* for opportunists, for which individuals facing difficulties with immigration officials had to pay several thousand euros.

After gaining official residence, some men found more or less stable work opportunities in the booming construction sector in Catalonia, which limited the sphere of their mobility within the region. Some of my interlocutors commuted after work between the cities of Tarragona, Girona and Lerida and made frequent returns to Morocco. They routinely engaged in small import activities of household goods and small electronic goods. Many returned to get married in their home community in Larache, yet often the economic conditions in Spain did not allow the establishment of households in Spain. In many cases, I observed that the wives and children remained in Morocco.

The economic recession of 2008 forced the men expand their sphere of movement again. Some returned to agricultural work and street commerce. Those women who had joined their husbands in Spain often returned to Morocco while the husbands began to search for job opportunities in different



Figure 2: Spanish-Moroccan second-hand dealer in a street market in Larache (Photo: Marko Juntunen, 2012).

parts of Spain and engaged in the cross-border trade of second-hand goods (*khurda*). These activities often involved the beneficiaries of unemployment and other benefits and these returns occurred outside the knowledge of the Spanish authorities.

ARE THESE MEN RETURN MIGRANTS?

At present, a highly individualized ethos marks this social world; it consists of individuals who interact, get together, yet are only linked through the fact that they share the same ethos, sentiments and motives of being mobile. Much like the Algerian suitcase traders described by Michel Peraldi, these men form emotional communities – rather than communities with shared values and norms (see Peraldi: 2005). They are united by the similar dreams of winning personal liberty, gaining autonomy to make decisions and to settle in emotional and existential terms. All these sentiments became particularly clear as the Arab Spring approached.

The spirit of protests and mass demonstrations was widely spread all over Morocco when I was carrying out fieldwork in the province of Larache once again in 2012. Thousands of internet news rooms, Facebook pages, blogs and pro-democracy organizations together with sporadic street demonstrations and standoffs sent a similar message; Moroccans displayed a growing determination to construct a more open space for political expression. I met several of my older acquaintances who had come to Morocco from Spain in order to escape severe economic difficulties. The men nearly unanimously still expressed the sense of ‘double absence’ familiar from my earlier fieldwork. Spain no longer had anything to offer them, yet they expressed feeling increasingly “humiliated and ripped off from personal dignity” in Morocco and not willing to put up with life in a society run by a “lobby of thoroughly corrupted elite of thieves” where “laws exist only for the poor”. The men routinely preferred to take a less direct role in the public demonstrations, stating that they personally had “nothing to do with Morocco” or alternatively that “the Moroccan state did not have any meaning for them”, expressing their alienation from Morocco as a nation-state and as a political and economic system. When talking about their demands, people idiomatically expressed simply wanting their just ‘share’ (*haqq*) of the society in economic, social and moral terms, saying that the current order deeply violated their ‘personal dignity’ (*karama*).

FINAL NOTE

By the fall of 2011 the total number of interceptions in Spanish-Moroccan-Algerian waters had reached its lowest figure in more than two decades, indicating that irregular migration on *pateras* had turned into a page in the history of Spanish-Moroccan relations. In the meanwhile the Spanish economy was facing an increasingly severe crisis. In Catalonia, in areas that had attracted thousands of irregular Moroccan migrants for more than a decade, the unemployment rate among Moroccans reached 55% in 2011.

The Moroccans who chose to leave Western Europe were conceptualised simply as *returnees*. While a once and for all return may be true in some cases, we must not overlook the fact that the struggle of the uprooted and alienated Moroccans involves constant back and forth movement between the continents, in ways that force us to critically examine the applicability of conventional concepts of migration studies.

The ways in which these men lived through the times of rapid change, the appearance of particular type of irregular migration, *harraga* and the way in which it paved the way to the emergence of a marginally mobile lifestyle is to be understood as ongoing battle between socially marginal groups and the increasingly globalized power structures. This article aimed to highlight the fact that the nature of the struggle could hardly be grasped in any other way than by observing over an extended period the ways in which the subjects themselves act out and verbalise what they are struggling for.

REFERENCES

- Al-Qabab, Muhammad (1998). *Al hijra s-sirriya*. [The Hidden Migration]. Unpublished presentation at the International Seminar on Human Rights and the Moroccan Migrant Community Abroad, Tangiers, Morocco 23–26 November 1998. Moroccan Ministry of Human Rights.
- Driessen, Henk (1998). The New Immigration and the Transformation of the European – African Frontiers. *Border Identities: Nation-state and International Frontiers* (eds. Thomas Wilson, Donnan Hastings). Cambridge and New York: Cambridge University.
- Gilsenan, Michael (1996). *Lords of the Lebanese Marches: Violence and Narrative in an Arab Society*. Berkeley: University of California.
- Lopez Garcia, Bernabe (1996). La evolución del origen de los inmigrantes Marroquíes en España. *Atlas de la Inmigración Magrebi en España*. Madrid: Universidad Autónoma de Madrid y Ministerio de Asuntos Sociales, Dirección General de Migraciones.
- Nini, Rachid (2002). *Diario de un ilegal*. Madrid: Oriente y Mediterráneo.
- Ogden, Phillip (1991). Immigration to France since 1945: Myth and Reality. *Ethnic and Racial Studies* 14/3, 294–318.
- Salih, Muhammad (1996). *Min Faqih Ben Salih ila Milano: Al hijra d-duwaliya al maghribiya ila Italiya wa ta'thiruha 'ala manātiq l-intilāq*. [From Faqih Ben Salih to Milano: Moroccan Migration to Italy and its Effects on the Sending Areas]. Rabat: Muhammed V University, Faculty of Humanities.
- Sørensen Nyberg, Ninna (2000). Crossing the Spanish-Moroccan Border with Migrants, New Islamists, and Riff-Raff. *Ethnologia Europaea* 30/2, 87–100.
- Vale de Almeida, Miguel (1996). *The Hegemonic Male: Masculinity in a Portuguese Town*. Providence and Oxford: Bergahn Books.
- Yaghmaian, Behzad (2005). *Embracing the Infidel: Stories of Muslim Migrants on the Journey West*. New York: Delacorte Press.

GOING NOMAD: NEW MOBILE LIFESTYLES AMONG EUROPEANS

Špela KALČIĆ¹

COBISS 1.01

ABSTRACT

Going Nomad: New Mobile Lifestyles among Europeans

Global modernity with its economic and technological transformations generates new mobile lifestyles that challenge officially recognized forms of human mobility. The new European nomads presented in this article are representatives of this newly emergent form of mobility. Closer ethnographic scrutiny reveals that these people are constantly on the move, and work and use several income-making strategies while on the road. Not only mobility and economic strategies, but also conceptions concerning reasons to be mobile, relations with the background society and the public spaces they traverse share similar features. There are numerous criteria according to which it is possible to talk about them as representatives of a new type of contemporary mobility, for which peripatetic nomadism, marginality and inventiveness are central characteristics. In the article I discuss the field research data that underscores the characteristics according to which my interlocutors can be conceptualised as “marginal mobile subjects”: their income depends on mobile and flexible economic strategies which define their patterns of more or less irregular movement; their social reality consists of in-betweenness, a lack of networks of assistance and invisibility in public space. Although they like to state that their lifestyle is a result of a free choice, the situations in their everyday lives reveal that their freedom is actually constrained by unfortunate or unsatisfactory life situations which often lead to feelings of marginalisation and being deceived by their background society, and they tend to bypass state bureaucracies imposing “sedentary norms” on their lives.

KEYWORDS: mobility, marginality, peripatetic nomadism, inventiveness, global modernity

IZVLEČEK

Med nomade: Novi mobilni življenjski stili med Evropejci

Globalna modernost s svojimi ekonomskimi in tehnološkimi transformacijami proizvaja mobilne življenjske stile, ki postavljajo pod vprašaj uradno prepoznane oblike človeške mobilnosti. Predstavniki takšne, na novo vznikle mobilnosti, so tudi v pričujočem članku predstavljeni Evropski nomadi. Bolj podroben etnografski vpogled razkrije, da so ti ljudje v nenehnem gibanju in delajo med potjo, pri čemer se poslužujejo različnih prihodkovnih strategij. Družijo jih ne le mobilnost in ekonomske strategije, temveč tudi način, na katerega konceptualizirajo razloge za svojo mobilnost, odnos do domače družbe in odnos do prostorov, skozi katere potujejo. Glede na številne kriterije bi jih lahko obravnavali kot pred-

¹ PhD in Social Anthropology, Research Fellow; Slovenian Migration Institute, Scientific Research Centre of the Slovenian Academy of Sciences and Arts, Novi trg 2, SI-1000 Ljubljana; spela.kalcic@zrc-sazu.si / spela.kalcic@gmail.com.

stavnike nove oblike sodobne mobilnosti, katere ključne lastnosti povzemajo peripatetični nomadizem, marginalnost in inovativnost. S člankom predstavljam s terenskim raziskovanjem pridobljeni material, ki izpostavlja karakteristike glede na katere bi lahko svoje informatorje konceptualizirala kot »marginalne mobilne subjekte«: njihov zaslužek je odvisen od mobilnih in fleksibilnih ekonomskih strategij, ki oblikujejo njihovo gibanje po bolj ali manj ohlapno načrtanih poteh; njihova družbena realnost je zaznamovana z vmesnostjo, odsotnostjo podpornih socialnih mrež in nevidnostjo v javnem prostoru; čeprav radi poudarjajo, da je njihov življenjski stil rezultat svobodne izbire pa situacije iz vsakdanjega življenja razkrivajo, da so se te oblikovale ukleščene v primež nesrečnih in nezadovoljivih življenjskih situacij, zaradi česar se pogosto počutijo marginalizirane in prevarane s strani domače družbe ter poskušajo zaobiti državne birokracije, ki njihova življenja omejujejo z nalaganjem sedentarnih norm.

KLJUČNE BESEDE: mobilnost, marginalnost, peripatetični nomadizem, iznajdljivost, globalna modernost

INTRODUCTION: PROCESSES OF NOMADIZATION AMONG EUROPEANS

In the global era, nation states are more and more incapable of controlling their economies and the conditions of their labour market. The global economic crisis beginning in 2008 has threatened to push more than twelve million people under the poverty line in the European Union.¹ In many areas across Western Europe the crisis struck the youth and the elderly particularly hard regardless of their ethnic backgrounds (Erlanger 2012). The crisis has generated wide disillusionment as the constant increase in the economic influence of global corporations on national economies has furthered the dislocation of power from politics. Recent media reports from EU member states such as Spain, Portugal, Italy, France and Greece reveal that these countries are currently facing severe problems of nationalizing and of disciplining their populations, who are openly demonstrating their frustration and devising various strategies for adapting to the uncertainty of their political future, the instability of markets, unexpected capital flows, price and tax increases and reduced welfare benefits and services.² Mobility has become one of the strategies to cope with this all-encompassing existential insecurity.

In the past decade, many Europeans have been pushed to migrate to places where they are able to reduce the cost of living, for example to Southern Europe (Spain, Portugal, France, Italy, Greece, Slovenia, Croatia, Serbia and Turkey) or to Africa (Tunisia, Morocco, Senegal, Burkina Faso, Ghana, Mozambique, Angola, South Africa) (Harding 2012; Kalčič 2012; Rogelja 2012). Among them, many have resorted to peripatetic survival strategies and constructed nomadic lifestyles between Europe and West Africa. For example, according to unofficial estimates for 2011, approximately 50,000 French people who are not traditionally nomads live in vehicles converted into mobile homes within the French territory (Angeras 2011). This phenomenon has up to the present remained largely unrecognized and unaddressed in popular, administrative, political and academic debates on mobility and migration. There is hardly any attention being paid to the fact that many Europeans are turning their backs on Europe.

The aim of this article is to address the phenomenon of nomadization among Europeans and to contextualise this mobile lifestyle within migration and mobility studies. Global modernity³ propelled by neoliberal capitalism and time-space compressing communication technologies contributes to the

1 According to EUROSTAT the highest percentages of population at risk of falling below the poverty threshold in the Euro area in 2011 were in Spain (21.8%), Greece (21.4%) and Portugal (18.0%) (EUROSTAT 2011).

2 See for example Govan 2012.

3 I understand global modernity as a descriptive term that refers to globalized (neoliberal) capitalism and time-space compression through modern communication technology and travel (Castells 2000; Giddens 1990).

formation of mobilities that are difficult to grasp within conventional conceptualisations, and which also challenge stubborn academic consensus so that clear analytical and conceptual boundaries between mobilities from the Global North and South can be drawn (Juntunen et al. forthcoming). I argue that one of these newly emergent mobilities is Europeans leading a nomadic life between Europe and Africa, whom I conceptualise as “marginal mobile subjects”. The concept of “marginal mobilities”, developed by Marko Juntunen, Nataša Rogelja and author of this article (forthcoming) defines “marginal mobile subjects” by the following features: “they lead a highly mobile lifestyle (1), which is neither entirely forced nor voluntary (2) and occurs along loosely defined trajectories (3). They do not participate in politicized public spheres (4) and are marked by sentiments of marginality and liminality. In addition, their life is marked by constant negotiations with respect to the sedentary norms of the nation state (5)” (ibid.). As such they can be compared to various other contemporary mobilities from the Global South or North.

The article is based on ethnographic data collected during extensive fieldwork that took place between January 2007 and May 2013 in Morocco, the Western Sahara, Mauritania, Mali, Niger, Guinea and Burkina Faso. During my research I employed the methods of mobile ethnography (D’Andrea 2006), participant observation with a focus on practices of moving and meeting with other mobile subjects, interviewing, as well as a good measure of self-reflection, which is a logical consequence of my personal involvement in the housetrucking lifestyle. All of the descriptions of the housetrucking lifestyle employed in the present article are based on field notes that I made during my fieldwork.

THE NEW EUROPEAN NOMADS

Since December 2006 I have travelled extensively in the West African Atlantic coastal regions and in different parts of the Sahara and the Sahel. Long before engaging in actual fieldwork, I came across many Westerners⁴ who resembled tourists and travellers, yet there was something peculiar about them. These people were of working age, but gradually I learned that they were not involved in any way in the labour market of their home societies. For them travelling was clearly not simply a holiday escape but a way of life; while many of those whom I met travelled and lived in various vehicles converted into mobile homes, others were carrying backpacks and used public transport or hitchhiked. I began to conceptualize them as peculiar kinds Western nomads worthy of deeper ethnographic scrutiny.

Despite the fact that they were all engaged in a mobile lifestyle between Europe and West Africa, they were far from a homogenous group. First, their degrees of connectedness to the sedentary life differed considerably. Some of them told me that they had real estate and property in their country of origin, to which they returned frequently. Many others, however, confessed not owning anything else of value but the mobile home in which they lived on both continents. I met several people who spent part of the year parked in areas where they were left in peace; in suburban areas of Berlin, the mountains and forests of Portugal, Spain and France, or in Britain and France in authorised campsites or council encampments established for nomadic people such as (New Age) Travellers/Gens du Voyage, Manouche, Roma/Gypsies etc. Others lived in close vicinity to squats in Toulouse, Marseille, London and other places, but it was not uncommon to meet those who lived part time at squats or alternatively turned to their friends, families, and the commercial rental market for housing while in Europe.

They represented not only several nationalities (the largest groups being French, Spanish and British) but also different age groups, with a variety of educational and professional backgrounds. There appeared to be varieties of mobile households, too. The most common form consisted of a couple

4 I use the term “Westerner” as a loosely defined category that commonly refers to people from the more affluent countries of Western Europe, but also from the countries with firm historical, cultural and ethnic ties to Western Europe such as The United States, Canada, New Zealand, and Australia. In the present article however I discuss Western Europeans engaged in nomadic lifestyles between Europe and Africa.

without children (the minority with children commonly stated that a mobile life with children requires more economic resources, planning, security and time-consuming household chores). Others travelled in pairs of friends, however single men on the road was not an uncommon sight in Africa. Single women on the road were rare exceptions.

Most of my interlocutors had left their sedentary lives after the year 2000. While some lived off savings or had regular income thanks to pensions, or relied on remote wage work or mobile economic strategies enabled by the internet and development of other information and communications technologies, the large majority had to resort to various flexible economic strategies.

Regardless of the differences among these newly emergent European nomads (moving in and out of Europe), my interlocutors clearly shared a common sentiment and cultural logic of engaging in mobile life. Closer ethnographic scrutiny reveals that these people are constantly on the move, work and use several income-making strategies while on the road. Not only mobility and economic strategies, but also conceptions concerning the reasons to be mobile, relations with their background society, and the public spaces they traverse share similar features. Their highly mobile lifestyles challenge the existing conceptual tools of migration and mobility studies and call for a rethinking of the administrative taxonomies tackling mobility and migration. Indeed, in many cases they resemble international retirement- and lifestyle- migrants,⁵ as well as sabbatical travellers⁶ and peripatetic nomads,⁷ yet there are numerous criteria according to which it is possible to talk about them as representatives of a new type of contemporary mobility, for which peripatetic nomadism, marginality and inventiveness are central characteristics. Below I will discuss my field research data that underscores the characteristics according to which my interlocutors can be conceptualised as “marginal mobile subjects” (Juntunen et al. forthcoming).

PUSHED FROM BEHIND

In conversation situations my interlocutors unanimously displayed a great readiness to emphasise the fact that their lives had improved as a result of making a rational decision to engage in nomadism. Yet closer observation revealed that the decision was actually taken amidst unfortunate or unsatisfactory circumstances, in most cases involving a family crisis, personal frustrations such as unsatisfactory professional situations, economic difficulties or general personal disharmony with the dominant values of the consumption-oriented background society.

5 Lifestyle migrants represent a heterogeneous group of people who occupy a place between tourism and migration (Bell et al. 2000; Gustafson 2002; Korpela 2009; O'Reilly 2003; Williams et al. 2000a). Lifestyle migration has been defined as a spatial mobility of “relatively affluent individuals of all ages moving either part-time or full time, permanently or temporarily to places which, for various reasons, signify for the migrants something loosely defined as quality of life” (Benson, O'Reilly 2009: 612). Under the umbrella of lifestyle migration as a phenomenon of “moving for a better life” (Benson, O'Reilly 2009: 2), we find typologies such as leisure migration, counter-urbanization, rural idyll, second home ownership, amenity seeking, seasonal migration, residential tourism, bourgeois bohemians as well as mid-life, retirement or family migration (see e.g. Ackers et al. 2004; Benson 2009; Benson, O'Reilly 2009; Bousiou 2008; Casado-Díaz et al. 2004; Hoey 2010; Howard 2008; Huber, O'Reilly 2004; Nudrali, O'Reilly 2009; Torkington 2011; Williams et al. 2000b).

6 As the descriptor suggests, travellers on sabbatical leave. Their movement to places outside of their usual environment represents a longer (one or two years) but temporary break from everyday routine after which they return to everyday sedentary life at home (Weber 1997).

7 Traditional groups of peripatetic nomads (Berland, Salo 1986) do not exploit natural but social resources and have been labelled by other researchers as service nomads (Hayden 1979), commercial nomads (Acton 1981), non-food producing nomads (Rao 1982) and symbiotic nomads (Misra 1982). The term “peripatetic nomads” is broader, more neutral, and most of all applies also to non-ethnic groups of nomads such as New Age English Travellers.



Figure 1: For some the only home they have (Photo: Špela Kalčič, Nouakchott, Mauritania 2010).

Most of my interlocutors come from the middle or lower economic strata of their background societies and had previously suffered from precarious positions in the labour and housing market. Thirty-four year old Stella is in many ways representative: After she finished her PhD in 2006 the research funding which she had received from her national research council ended. The research institute where she used to work could not provide resources for an extension of the work contract and she became unemployed. As she had never travelled for a longer period of time she was very happy to join her boyfriend on a trip to Niger in an old Land Rover. Like many other travellers to West Africa they covered their travel expenses by selling the car in Africa. After she returned, Stella applied without success for several postdoctoral positions and found herself in an extremely dissatisfying situation working as an underpaid part-time entertainer in a team which organises recreational events for big companies. She said that her monthly housing expenses exceeded her salary. Soon afterwards her boyfriend told her that he had found a mobile home; an affordable four-wheel-drive truck. Stella decided to give up her saving for an apartment, a plan that she could never make come true, and helped her boyfriend buy the vehicle.

As her boyfriend had obtained a one-year writing grant, he suggested that they could cover their living expenses for a longer time by going to Africa. In West Africa Stella began to write articles for magazines to supplement their budget. Together with her boyfriend she engaged in occasional tour guiding in Morocco and they gained experience in trading second-hand goods. In the second half of 2008 the magazines she had written for stopped buying articles from freelance journalists. Due to budgetary cuts in her home country Stella's options for gaining academic scholarships were reduced greatly. Stella and her boyfriend were now forced to find a new source of income. They decided to fly back to Europe in order to buy a Mercedes Benz van which they could sell for a profit in Bamako, Mali.

Similarly to Stella, numerous among European nomads that I have met along the way find themselves in vulnerable economic positions. Many pay income tax in the country in which they are citizens,

yet they often find themselves in precarious situations and struggle with bureaucratic obstacles with regard to maintaining their rights to numerous social services and benefits. Experiences of unemployment, redundancy at the age of fifty, miserable pensions, blocked careers; a precarious labour market position and homelessness together with sharp criticism towards the dominant norms of the background society marked by neoliberal capitalism were widely shared. Stella once told me: "If the academic system hadn't put me in a position in which I can't earn enough to afford a home and food, I wouldn't be here now." My interlocutors saw themselves as being "pushed from behind" (Bauman 2001) in a variety of ways and marginalized by their background society. The conventional classification of mobilities as voluntary mobilities (e.g. tourism, travel, lifestyle migration, business travel or economic migration) which stand in opposition to forced mobilities (refugees and asylum migration) therefore has hardly any relevance to the subjects of my study.

FLEXIBLE AND MOBILE ECONOMIC STRATEGIES

As in Stella's case, the predominant form of income generating among the nomads I have met is engaging in various flexible and mobile economic strategies. While in Europe my interlocutors meet their expenses by engaging in the unregulated economic niches of tourism related services and construction sites, and during the harvest season in agriculture picking fruits and grapes. Furthermore they export domestic appliances and second-hand goods such as clothes, computers, cameras, bicycles, motor-bikes and furniture, as well as second-hand vehicles and spare car parts to Africa. Those who sell vehicles always bring along goods that can be sold on the way to one of the West African vehicle markets.



Figure 2: The new European nomads engage in various flexible and mobile economic strategies. Selling second-hand goods in West African street markets is one among several options (Photo: Nicolas Pernot, Tetouan, Morocco 2011).

Such places include the border zone between Morocco and Mauritania, Nouakchott in Mauritania, the Mauritanian – Malian border, Bamako in Mali, Bobo Dioulasso and Ouagadougou in Burkina Faso and Niamey in Niger. Many rely economically entirely on exporting vehicles, making up to seven annual trips between Europe and Africa. Second-hand goods usually cover the expenses for fuel and generate some profit depending on the “cargo”. Smaller items are usually sold on the way: in Moroccan souks, in front of motels, and in parking areas and petrol stations. These trade sites are chosen spontaneously, whenever opportunities for trade appear. By far the most profitable second-hand goods are vehicle engines and spare parts, together with computers, cameras, mobile phones and other digital devices. Maintaining a profitable business in West Africa, I was told, required having good connections with the local population. Those who sell vehicles have often established long-term connections with local brokers and with each trip they make agreements regarding future business transactions with them.

However, not all of the new European nomads I met were interested in trade. In fact the majority of my interlocutors said that they needed money just to cover their everyday expenses and to spend life in a meaningful way. A French couple in their late twenties who had led mobile life in a housetruck for several years stated: “We have a little money but lots of fun.” They claimed that they spend no more than 400 Euros a month. They suffice their budgets by picking grapes and fruits in France and supplement their income with unemployment benefits.

In fact, many European nomads rely on different kinds of benefits granted by their national social security systems; these include benefits for disabled people, child allowances, unemployment benefits and income support. They often stated in interview situations that in Africa they can minimize their expenses and thus save part of the benefit money for the future. For example, I talked with several retired people who had encountered increasing economic problems since the recession of 2008 as the government of their home country had implemented pension cuts. Rather than spending money on heating and other housing expenses they told it is much more preferable to spend the winter in Morocco or the Western Sahara. As a fifty-nine-year-old French interlocutor told me in Dakhla in the Western Sahara in November 2011:

I used to have a bakery. After my husband retired I sold it. I am not entitled to a pension yet. With the crisis France it became too expensive to live on one pension only, so we made a calculation and concluded that it is cheaper to buy a second-hand camper and spend winters in Morocco then pay each year for heating at home. In this way we do not economize only on heating but also on food. Everything is cheaper here and besides, the food is really delicious.

Some of those with better vehicles occasionally run more or less official tourism businesses. While some operate through their internet sites, others are completely informal entrepreneurs. The new information and communications as well as navigation technologies have enabled many to engage in entirely mobile work. However, those who engage in remote work and have steady Western-standard salaries were a privileged few among my interlocutors. These individuals work in fields such as computer programming, translating, writing, illustrating, design, photography, research, education, businesses and overland touring.

Most of these new nomads said that they spend the summer months in Europe and begin their journeys towards Africa and south along the Atlantic coast of Morocco and the Western Sahara in the late autumn, when the European climate gets colder. Some of them stop in one place for extended periods and circulate only between their winter and summer camps. However, those who engage in petty commerce and second-hand trade of vehicles and domestic appliances literally live on the road and circulate with a more or less intensive frequency between the continents all year long. In the case of these individuals the destinations keep changing along the travel trajectory, largely depending on the social, political, economic and climatic conditions in the localities traversed. However, the freedom of this spontaneity is restricted, as more often than not their movement is directed by pursuit of income.

It is in fact the movement itself that distinguishes these mobilities from contemporary migrations. This is not a simple linear movement from one location to another, a once and for all (Acton 2010: 7). The lifestyle of these people does not line up with the definition of migration (see Van Dijk et al. 2001). I have observed dozens of mobile subjects who circulate along loosely defined transnational trajectories, do not follow strictly fixed routes, nor does their travel occur between a limited number of sending and receiving communities where they reside extended periods of time. This movement is also not about changing a place of residence or radical break up of social ties. It is rather about circulating among coincidental and beforehand learned places of more or less temporary stops⁸ that consist of unauthorised makeshift encampments on unused lands or verges of roads, parking areas, forests, occasionally in authorised camps and hotels or rental housing, as well as places held by friends, family members or acquaintances, located along their trajectories. Furthermore, for these people travelling represents a settled way of life, not an exception as in the case of classic migrants.

PERIPATETIC NOMADISM WITHOUT KINSHIP ALLIANCES

Actually, my interlocutors share similar relation with space as traditional peripatetic nomadic people (Acton 2010; Berland, Rao 2004; Berland, Salo 1986; Berland 1992; Reyniers 1995). As defined by Thomas Acton (2010: 7), peripatetic nomadism presents a specific form of exploitation of resources that are available at the particular territory and is based on circulation of individuals in the middle of social entities which organise access to this exploitation. As in the case of my interlocutors, peripatetics provide their services and certain skills, practise commercial nomadism, which differs from "traditional" nomadism of hunters-gatherers and pastoral nomads (ibid.). According to Joseph Berland and Matt Salo (1986: 2), peripateticism is defined as "the regular demand for specialized goods and/or services that more sedentary or pastoral groups cannot, or will not support on a permanent basis". It presents a nomadic strategy that "exploits social rather than natural resources in larger ecocultural systems" (ibid.: 3). However, demand for these services, merchandise and labour is intermittent, which is why movement to another place which provides new opportunities for work and gains is required.

Peripatetic nomadism is "the recurrent exploitation of spatially and temporally discontinuous economic opportunities" (Acton 2010: 6). It is economically, not culturally driven movement, which similarly as in the case of economic migration builds on the pursuit of a better standard of living (ibid.: 7). And this characteristic presents another moment of accordance with my interlocutors, who use their mobile lifestyles to "muddle through" the period of unemployment before they obtain their pension, or alternatively, work and use several income-making strategies while on the move. Mobility for them has become a strategy of survival due to the economic problems and feelings of futurelessness they faced in their sedentary life in Europe. As we have seen, "flexible skills and knowledge about resources in the larger social systems they exploit are key elements towards understanding [the] peripatetic adaptations" (Berland, Salo 1986: 3) of these new European nomads, for whom nomadism in fact represents a form of resilience in times of crisis.

⁸ John Urry and Mimi Sheller argue that "moorings configure and enable mobilities" (Sheller, Urry 2006: 3). Urry further defines nomadism as a constant mobility that also includes temporary rests, i.e. "moorings": "Temporary rest and replenishment are conditions of mobility. Overall it is the moorings that enable movements. And it is the dialectic of mobility/moorings that produces social complexity" (Urry 2003: 126). Similarly, Joseph C. Berland and Matt T. Salo have observed that among peripatetic nomads "relative levels of mobility and/or sedentarization are not viewed as opposites" (Berland, Salo 1986: 4-5). Therefore the constant mobility of a nomadic lifestyle should not be considered without sedentary periods as a constitutive part of nomadism.

The existential dimension of this movement also represents a moment of discordance with international retirement – and other lifestyle migrants whose mobility is more about voluntary travel to and residence at localities where living costs are low, the climate pleasantly warm and life relaxed, i.e. better, and financed by pensions or periodical work in the Global North (see e.g. Ackers et al. 2004; Benson 2009; Benson, O'Reilly 2009; Casado-Díaz et al. 2004; Hoey 2010; Howard 2008; Huber, O'Reilly 2004; Nudrali, O'Reilly 2009; Torkington 2011; Williams et al. 2000b). However, these new nomads could be placed side by side with the bohemian wing of lifestyle migrants (Korpela 2009), sometimes denominated as “expressive expatriates” or “global nomads” (D’Andrea 2006, 2007), who lead accentuated mobile transnational lifestyles, embrace more spiritual and artistic aspirations (Korpela 2009: 29) and circulate through global circuits of countercultural lifestyle (D’Andrea 2006), where they establish permanent homes (that they regularly leave and stay away for several months), but also earn money utilising their skills, establish their own businesses etc. (Korpela this volume). The characteristics of bohemian lifestyle migrants and the subjects of my study do indeed coincide, but I nevertheless argue that my interlocutors seem to challenge the deeply rooted academic convention of analytically separating the “privileged” mobilities of the subjects from the Global North from those of the Global South, considered as “unprivileged”, and that the concept of lifestyle migration itself represents one of such analytical frameworks which does not consider looking past this separation. That is why I prefer to conceptualise them as “marginal mobile subjects” (Juntunen et al. forthcoming). That is, the new European nomads are in many ways also comparable with less affluent and less privileged contemporary mobile subjects of various geographic and ethnic provenances such as New Age Travellers (Clark 1997; Hetherington 2000; Martin 1998, 2002), Tuareg *ishumar*, “a generation of border-crossers whose living conditions have created special mobility strategies” (Kohl 2009, this volume), or the once irregular migrants, today “marginalized Moroccan men in transnational space” (Juntunen this volume). Indeed, more and more people from both the Global South and the Global North today manage their household economies by circulating along irregular transnational trajectories (Angeras 2011; D’Andrea 2007; Kalčić 2012; Korpela 2009; MacGaffey, Rémy 2000; Rogelja 2012, this volume) and share numerous traits with traditional peripatetic nomads, yet the cultural ethos of their movement can only be grasped with respect to global late capitalism.

The nomadism of the new European nomads is not rooted in a tribal system and organised through descent groups as in the case of traditional peripatetics where kinship represents the structural and organising principle of community (Berland, Salo 1986: 4). Belonging is not based on blood relations, and sense of ethnic or national identity is extremely weak. They also do not perceive themselves as “members of a closed system” (ibid.). Their nomadism is rather marked by pronounced individualism, based on a personal decision to change their lifestyle, which is nevertheless embedded in the situation of the global modernity which promotes, enables and generates an escape to an alternative *modus vivendi*. The individualism of my interlocutors is, I argue, the main trait which distinguishes their peripatetic nomadism from the traditional form.

IN-BETWEENNESS

In our conversations, many of these European nomads expressed feelings of being deceived by their home societies and a quite critical and embittered attitude towards the political and social order in their states of origin. They lacked patriotic feelings of belonging towards their “homeland”, and disillusionment with the national states system in general was widespread. Many claimed that contemporary states can no longer provide both material and psychological stability and that they are governed by neoliberal interests which are going against their own citizens and humanity in general. They were disappointed with the social welfare system and did not believe in economically secure old age, a just tax system and social justice in general. Stella verbalised her disappointment in the following words:

For my PhD I received a letter of congratulations from the president of the country, and me unemployed... If I want to stay in this [academic] machinery I have to attend conferences. But you have to cover travel expenses and fees up to 400 Euros on your own if you want to go to them. I don't have this money! Science has become a business: if I want to earn money through research I have to gain money for my salary through projects; if I want to win a project, I need to have strong references from conference presentations and publications, and if I want to publish, I have to have time for writing, which I don't have, because I have to earn [enough] to put something in my stomach first... And when I need dental work they book me for the next month, so I have to go to a private dentist, which I can't afford. I am thirty-four and my work history amounts to three years. I have been working since I was eighteen... Ciao social security, this is hardcore capitalism!

While the sense of national belonging among my interlocutors was predominantly weak, they stressed commonality with people of similar experience that they met on the way. Their social interactions took place in shifting and occasional small groupings of people who simply happened to stop in the same places for a few days. These sporadic and ephemeral gatherings often involved fixing the vehicles, the exchange of nomadic experiences and information on travel routes. Solidarity and readiness for reciprocal help was clearly displayed, but these solidarities were first and foremost purely circumstantial. Nevertheless, these short-lived encounters were often enough for the development of feelings of belonging, based on the same experiences and lifestyle on the road. Those with a place to stay in Europe clearly demonstrated a willingness to host others if they should drop by one day and seek shelter on their plot. This solidarity was particularly stressed among full-time housetruckers⁹ who face numerous problems in Europe with regard to makeshift and free-of-charge camping.

The social relations among these nomads are highly situational and have a fleeting character. That is, there was a very weak sense of commonality among my interlocutors. These people practiced situational solidarity but at the same time it was really easy for them to take off and try a more or less temporary life somewhere else. They were actively communicating and networking among themselves, as well as with the local populations, but ties that they established were of an instant, weak and fluid nature. The relation to the spaces they traverse was marked by accented social weightlessness. As in the case of the postmodern mobile subjects described by Vered Amit and Nigel Rapport (2002) within the theory of post-cultural anthropology, they experienced cross-border/continental movement without participating in transnational collectivities or attributing a new social identity to the experience of mobility (*ibid.*: 4). They did not try to create any firmer community which would root them into the places of "temporary rests" (Urry 2003: 126). Their social connections and networks were different from the case of traditional peripatetics, as they were not connected with rootedness to a particular territory (Reyniers 1995: 49). While traditional peripatetics depend on complex networks of alliances which also organise their mobility and, in opposition with the common belief about nomads, also connects with territoriality, the central constituents of mobility among my interlocutors were the notions of disjunction, escape, ambiguity and uncertainty. The absence of any kind of network of assistance marked their social world by a complete uprootedness and liminality, and similarly to Stella many confessed of being familiar with an occasional state of limbo:

I can't rely on help from my family. This kind of life can be a very lonely position. All that I have in my life is him [her partner]. If I'm sick, if I'm sad, if I'm scared and worried, he is the only one that I can rely on... It can be really tiresome sometimes to be without a fixed job and a constant circle of friends. Whatever happens, we are alone. No back-up, no nothing.

The individualistic kind of peripateticism practiced by these Europeans is marked by a "position between positions" (Turner 1974: 237) and this is actually the space within which they operate: they simul-

⁹ People travelling and living in cars, jeeps, vans, caravans, buses or trucks converted into mobile homes (Kalčič 2012).

taneously participate in many worlds while not belonging to any of them. Another of the “symptoms” of this in-betweenness is their invisibility in public space. They do not create politicized identities or politicized public spheres characteristic of contemporary migrant and diasporic communities. One of the reasons for this is the fact that they lead highly individualistic lives on the move, and the other is related to the fact that in cases when people participate in unregulated economic niches or rely on the management of welfare benefits, invisibility is “required” as it makes bare survival possible.

A NOMADIC LIFE IN A SEDENTARY WORLD

Many of my interlocutors perceived West Africa as a place free of the countless bureaucratic rules imposed on citizens of Western countries. While in West Africa, they reported, they do not face major constraints on nomadic life and are rarely troubled by the police and other authorities. Free of charge stay is still available in most parts of West Africa. They said that they learn about suitable stopover sites from online forums, other travellers, and most often by observing roadsides. As they tend to minimise expenses they avoid for-pay services such as tourist camping sites and resort to makeshift camping, which requires more interaction with local populations whose consent is required for the stay.

The only bureaucratic requirements that they face are a personal entry visa, country-specific car insurance, and a temporary “pass through permit” for the vehicle, required by most African states. Africa was perceived as a place where everything can be always “arranged”. For example, in certain West African countries one can purchase a visa for up to five years and many states make it possible to obtain local residency which enables a long-term stay in the country. Expenses on insurance can be always cut down by negotiating with the agent, and as vehicle circulation licences are very often not authenticated, by simply altering the technical information on the vehicle. One of my interlocutors, a man who had at the time of our conversation lived for five years between Europe and West Africa, described his relation to Africa in the following words:

Sometimes I ask myself, what I am actually doing in this dust, filth, illiteracy, and unbearable heat. Why am I not in some other, more ironed part of the world? The answer lies in the amount of practical freedom that (however paradoxically this might sound) the black continent has to offer.

In contrast, Europe was perceived as a place of endless negotiation with state bureaucracies that impose a “sedentary norm” on their lives. That is, in many EU countries, legislation together with indirect constraints on nomadic life directly delimits the possibilities for mobility by setting restrictions on camping. Parking in official sites such as camps can cost several thousands of Euros annually, while “wild” camping is forbidden in most countries and free of charge sites for nomadic people (Travellers/Gens du Voyage, Roma/Gypsies, Manouche) are provided only in France and Great Britain (Janko Spreizer this volume). My interlocutors therefore seek to stop in areas known for their relaxed bureaucracy, low fees or complete lack of attention from local authorities regarding their stay. Moreover, they revealed that while in Europe, they very often hide the fact that they are leaving in their vehicles in one place, because in the EU vehicles that are used for “camping” are also required to meet strictly defined regulations regarding sanitary and food preparation facilities. They told me they were obliged to improvise in order to bypass bureaucratic norms that require costly arrangements. Thus very often they simply registered their vehicles as ordinary vehicles, and hide the fact that they actually live in them.

As most of these European nomads lived on extremely limited budgets, they were highly motivated to circumvent the bureaucratic requirements in the most economical way. For example, being outside of their home country they usually chose not to renew the registration and insurance of their vehicles if they did not have intention of an early return. As Stella explained:

I really don't know why we should pay for insurance which is not valid here and pay for the use of roads that we are not using and we don't intend to use for the next seven months at least.

Many were manipulating their national social security system in order to be able to claim different forms of benefits that they relied on, while spending extended periods of time outside of their country of origin. However, maximizing the benefits granted by citizenship and legal residence requires one to be at least occasionally within the reach of the authorities. Leading a nomadic life in a sedentary world does not come without payment: in most cases these people left a sedentary life behind in order to be able to survive, and now they had to pretend to be sedentary for the same reason. This paradox was very well illustrated by Stella:

During the first six months I was out of work I was entitled to unemployment benefits. The counsellor at the employment centre told me that I am overeducated and that I shouldn't expect them to find me a job. Despite this I had to attend seminars where they were teaching us how to apply for a job! After this period the benefits were cut down, it was not enough, neither to live nor to die. I was not allowed to get supplementary work either as I would lose the rights to my benefits, and on top of this, I had to present myself at the service every month. Checkmate! When we decided to travel, I came up with the excuse of going to study in libraries abroad. At that time I did not yet know if I would be able to live on writing for journals and I needed those benefits regardless of how lousy they were.

As stated by Juntunen et al. (forthcoming), "citizenship and residence grant rights to welfare services and benefits only to those individuals who fulfil the sedentary norm. Entitlement to numerous social statuses, rights and benefits, and obtaining personal documents, certificates and licenses all require a permanent address and the same holds true with participation in official economic life through the banking system". For these reasons people like Stella constantly balance their lives between two ends and devise various strategies for convincing state authorities that they live at a permanent address and that they are therefore available to the authorities when needed. These strategies are however responses to their precarious position and uncertain economic future in which they found themselves due to the instability of global politics and markets.

In circumventing the sedentary norm, inventiveness plays a key role. As Berland and Salo (1986) have noted, peripatetics are especially attuned to changes in social and economic circumstances as well as a broad spectrum of other factors that may influence patterns of human needs and desires in the communities they exploit. It is their advanced knowledge and astute predictions about ecological, political and other factors that activate the choices of particular skills, goods and/or services that are incorporated into their peripatetic repertoires (ibid.: 4). In the situation of the global economic and political crisis directed by the neoliberal world order, the new European nomads "chose" to challenge the world of state bureaucracies imposing a sedentary norm on their lives. This world consists of the national welfare systems, housing markets, insurance systems, and in a way, even "national" petrol markets etc. Perceiving themselves as being deceived by the empty promises of the neoliberal Western state and critical of capitalist economies in general, they seek to evade "state-market-morality regimes" (D'Andrea 2007: 23): they try to pay as little as possible to the state and take as much as possible from it. They accomplish this by hiding the physical fact of leading a nomadic life in a vehicle, by manipulating the technical and registration data on the vehicle, by working unofficially in unregulated niches, by driving on vegetable oil or heating oil – all extremely affordable strategies but prohibited by law in most countries of the Global North – by taking welfare benefits while spending longer periods of time out of national territory, by pretending to live at a permanent address in order to maintain their right to social services and other benefits, etc.

FINAL NOTES

Global modernity with its economic and technological transformations generates new mobile lifestyles that question officially recognized forms of human mobility. The new European nomads presented in this article are representatives of such a newly emergent mobility. Their story is marked by marginality at several levels: first, they faced existential difficulties accompanied by the lack of social security and inadequate assistance from their background societies. Disqualification in the labour market led them to adopt a nomadic lifestyle marked again by social unacceptability and stigmatization by dominant social groups and the sedentary world order in their home societies (Coudouel et al. 2004; Gerster 2000; Gurung, Kollmaier 2005). Second, they found themselves in a state of ambiguous limbo of fluid and fleeting social relations, unimportance, uncertainty and not really belonging to any particular social group (Boon 1999 in Green 2005; Turner 1974). And finally, while society has dropped them out, they have turned their marginalisation into their own benefit. Their un-identifiable position of in-betweenness provides a space for resistance and empowerment (Green 2005; Herzfeld 1997; Serematakis 1991).

Apparently insignificant, these European nomads employ subversion which serves their ends: they are creating something new out of making things unclear and uncertain (Green 2005: 4). Their lifestyle brings to the fore the subversive dimension of mobility, which is related to its capacity of changing perspectives on how things are seen and done. That is, mobility is not solely a physical movement through space but also a mental movement that can be epitomized in Deleuze's famous statement that "the nomad does not move" (cited in D'Andrea 2007). "Movement is not just the experience of shifting from place to place; it is also linked to our ability to imagine an alternative" (Papastergiadis 2000: 11). The philosophy of such subversive mobility that enables an alternative is based on a tendency towards invisibility and non-recognition. In the case of these nomads, both are derived from their marginality.

The new European nomads do not fit into any conventional category conceptualised within migration and mobility studies. As we have seen, their income depends on mobile and flexible economic strategies which define their patterns of more or less irregular movement; their social reality consists of in-betweenness, a lack of networks of assistance and invisibility in public space; although they like to state that their lifestyle is a result of a free choice, the situations in their everyday lives reveal that their freedom is actually constrained by unfortunate or unsatisfactory life situations; therefore they often feel marginalised and deceived by their background societies, and tend to bypass state bureaucracies which impose a "sedentary norm" on their lives. According to these features they can without any doubt be conceptualised as "marginal mobile subjects" (Juntunen et al. forthcoming).

REFERENCES

- Ackers, Louise, Dwyer, Peter (2004). Fixed Laws, Fluid Lives: The Citizenship Status of Post-retirement Migrants in the European Union. *Ageing and Society* 24/3, 451–75.
- Acton, Thomas (1981). Gypsylorism in the Far East. *Newsletter of the Gypsy Lore Society* 4/1, 2–6.
- Acton, Thomas (2010). Theorising Mobility: Migration, Nomadism and the Social Reconstruction of Ethnicity. *Romani Mobilities in Europe: Multidisciplinary Perspective* (ed. Nando Sigona). Oxford: Oxford University, Refugee Studies Centre, 5–11.
- Amit, Vered, Rapport, Nigel (2002). *The Trouble with Community. Anthropological Reflections on Movement, Identity and Collectivity*. London: Pluto Press.
- Angeras, Anaïs (2011). *Du nomadisme contemporain en France. Avec les saisonniers agricoles qui vivent en camion*. Master 2 Recherche Spécialité Dynamique des Cultures et des Sociétés 2010. Lyon: Université Lumière Lyon II.
- Bauman, Zygmunt (2001). *Community: Seeking Safety in an Insecure World*. Cambridge: Polity Press.

- Bell, Martin, Ward, Gary (2000). Comparing Temporary Mobility with Permanent Migration. *Tourism Geographies* 2/1, 87–107.
- Benson, Michaela (2009). The Context and Trajectories of Lifestyle Migration. *European Societies* 12/1, 45–64.
- Benson, Michaela, O'Reilly Karen (2009). Migration and the Search for a Better Way of Life: a Critical Exploration of Lifestyle Migration. *The Sociological Review* 57/4, 608–625.
- Berland C., Joseph (1992). Territorial Activities among Peripatetic Peoples in Pakistan. *Mobility and Territoriality. Social and Spatial Boundaries among Foragers, Fichers, Pastoralists and Peripatetics* (eds. Michael J. Casimir, Aparna Rao). New York, Oxford: Berg, 375–396.
- Berland, Joseph C., Rao, Aparna (eds.) (2004). *Customary Strangers. New Perspectives on Peripatetic Peoples in the Middle East, Africa and Asia*. London: Praeger.
- Berland, Joseph C., Salo, Matt T. (1986). Peripatetic Communities: An Introduction. *Peripatetic Peoples* (eds. Joseph C. Berland, Matt Salo). Special Issue of *Nomadic Peoples* 21/22, 1–6.
- Boon, James (1999). *Verging on Extra-Vagance: Anthropology, History, Religion, Literature, Arts... Showbiz*. Princeton: Princeton University Press.
- Bousiou, Pola (2008). *The Nomads of Mykonos. Performing Liminalities in a 'Queer' Space*. New York, Oxford: Berghahn Books.
- Casado-Díaz, María Angele, Kaiser, Claudia, Warnes, Anthony (2004). Northern European Retired Residents in Nine Southern European Areas: Characteristics, Motivations and Adjustment. *Ageing and Society* 24/3, 353–81.
- Castells, Manuel (2000). *The Rise of the Network Society. The Information Age: Economy, Society and Culture Vol. 1*. Cambridge, MA; Oxford, UK: Blackwell.
- Clark, Colin (1997). "New Age" Travellers: Identity, Sedentarism and Social Security. *Gypsy Politics and Travellers Identity* (ed. Thomas Acton). Hertfordshire: University of Hertfordshire Press, 125–141.
- Coudouel, Aline, Hentschel, Jesko S., Wodon, Quentin T. (2004). Poverty Measurement and Analysis. *World Bank Poverty Reduction Strategies (PRSP)*, sourcebook, 27–74.
- D'Andrea, Anthony (2006). Neo-Nomadism: A Theory of Post-Identitarian Mobility in the Global Age. *Mobilities* 1/1, 95–119.
- D'Andrea, Anthony (2007). *Global Nomads. Techno and New Age as Transnational Countercultures in Ibiza and Goa*. New York: Routledge.
- Erlanger, Steven (2012). Young, Educated and Jobless in France. *The New York Times*, <http://www.nytimes.com/2012/12/03/world/europe/young-and-educated-in-france-find-employment-elusive.html?pagewanted=2&r=0> (2 Dec. 2012).
- EUROSTAT (2012). At Risk of Poverty Rate by Poverty Treshold, Age and Sex, http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ilc_li02&lang=en (2 Dec. 2012).
- Gerster, R (2000). *Alternative Approaches to Poverty Reduction Strategies*. SDC Working Paper 1/2000, Bern, Switzerland.
- Giddens, Anthony (1990). *The Consequences of Modernity*. Cambridge: Polity Press.
- Govan, Fiona (2012). Spanish Mayor Hailed as Modern-day Robin Hood, <http://www.telegraph.co.uk/news/worldnews/europe/spain/9467635/Spanish-mayor-hailed-as-modern-day-Robin-Hood.html> (15 Nov. 2012).
- Green, Sarah (2005). *Notes from the Balkans. Locating Marginality and Ambiguity on the Greek Albanian Border*. Princeton: Princeton University Press.
- Gurung, Ghana S., Kollmair, Michael (2005). *Marginality: Concepts and their Limitations*. IP6 Working Paper Series 6, <http://www.nccr-pakistan.org/publications.html> (19 Aug. 2010).
- Herzfeld, Michael (1997). *Cultural Intimacy: Social Poetics in the Nation-State*. New York: Routledge.
- Gustafson, Per (2002). Tourism and Seasonal Retirement Migration. *Annals of Tourism Research* 29/4, 899–918.

- Harding, Andrew (2012). Portuguese Find the Good Life in Mozambique, <http://www.bbc.co.uk/news/world-africa-17072588> (1 May 2012).
- Hayden, Robert (1979). The Cultural Ecology of Service Nomads. *The Eastern Anthropologist* 32/4, 297–309.
- Herzfeld, Michael (1997). *Cultural Intimacy: Social Poetics in the Nation-State*. New York: Routledge.
- Hetherington, Kevin (2000). *New Age Travellers. Vanloads of Uproarious Humanity*. London: Cassel.
- Hoey, A. Brian (2010). Place for Personhood: Individual and Local Character in Lifestyle Migration. *Midwestern City & Society* 22/2, 237–261.
- Howard, Robert (2008). Western Retirees in Thailand: Motives, Experiences, Wellbeing, Assimilation and Future Needs. *Ageing and Society* 28/2, 145–163.
- Huber, Andreas, O'Reilly, Karen (2004). The Construction of *Heimat* under Conditions of Individualized Modernity: Swiss and British Elderly Migrants in Spain. *Ageing & Society* 24, 327–351.
- Juntunen, Marko, Kalčić, Špela, Rogelja, Nataša (forthcoming). Mobility, Marginality and the Global Economic Recession. Western Nomads and Mobile Moroccan Men. *Nordic Journal of Migration Research*.
- Kalčić, Špela (2012). The Ethnography of Housetrucking in West Africa: Tourists, Travellers, Retired Migrants and Peripatetics. *Dve domovini/Two Homelands* 36, 101–118.
- Kohl, Ines (2009). *Beautiful Modern Nomads: Bordercrossing Tuareg between Niger, Algeria and Libya*. Berlin: Reimer.
- Korpela, Mari (2009). *More Vibes in India. Westerners in Search of a Better Life in Varanasi*. Tampere: Tampere University Press.
- MacGaffey, Janet, Bazenguissa-Ganga, Rémy (2000). Congo-Paris: Transnational Traders on the Margins of the Law. Bloomington, Indiana University Press and Oxford: James Currey, in association with the International African Institute.
- Martin, Greg (1998). Generational Differences amongst New Age Travellers. *The Sociological Review* 46/3, 735–756.
- Martin, Greg (2002). New Age Travellers: Uproarious or Uprooted? *Sociology* 36/3, 723–735.
- Misra, Pankaj K., Misra, Rajalakshmi (1982). Nomadism in the Land of Tamils between 1 A.D. and 600 A.D. *Nomads in India* (eds. Pankaj K. Misra, Kailash Chandra Melhotra). Calcutta: Anthropological Survey of India.
- Nudrali, Ozlem, O'Reilly, Karen (2009). Taking the Risk: The British in Didim. *Lifestyle Migration: Expectations, Aspirations and Experiences* (eds. Benson Michaela, Karen O'Reilly). Burlington: Ashgate Publishing, 137–157.
- O'Reilly, Karen (2003). "When is a Tourist?" The Articulation of Tourism and Migration in Spain's Costa de Sol. *Tourist Studies* 3/3, 301–317.
- Papastergiadis, Nikos (2000). *The Turbulence of Migration. Globalisation, Deterritorialisation and Hybridity*. Cambridge: Polity.
- Rao, Aparna (1982). Non-food-producing Nomads and Problems of Their Classification: the Case of the Ghorbat in Afghanistan. *The Eastern Anthropologist* 35/2, 115–134.
- Reyniers, Alain (1995). Migration, movement et identité. *Hommes et migrations* 1188/1189, juin-juillet, 45–51.
- Rogelja, Nataša (2012). Liveaboard in the Mediterranean: Luxury or Marginality? – Ethnographic Reflections on Maritime Lifestyle Migrations. *Dve domovini/Two Homelands* 36, 119–130.
- Serematakis, Nadia (1991). *The Last Word: Women, Death, and Divination in Inner Mani*. Chicago: Chicago University Press.
- Sheller, Mimi, Urry, John (2006). The New Mobilities Paradigm. *Environment and Planning* 38, 207–226.
- Torkington, Kate (2011). Defining Lifestyle Migration. *Dos Algarves* 19, 99–111.
- Turner, Victor (1974). Liminal to Liminoid in Play, Flow, and Ritual: An Essay in Comparative Symbolology. *Rice University Studies* 60/3, 53–92.
- Urry, John (2003). *Global Complexity*. Malden, MA: Blackwell.

- Van Dijk, Han, Foeken, Dick, Van Til, Kiky (2001). Population Mobility in Africa: An Overview. *Mobile Africa: Changing Patterns of Movement in Africa and Beyond* (eds. Mijam de Bruijn, Rijk van Dijk, Dick Foeken). Leiden, Boston, Köln. Brill, 9–26.
- Weber, Irena (1997). *Kultura potepanja*. Ljubljana: Mladinska knjiga.
- Williams, Allan, Hall, Michael (2000a). Tourism and Migration: New Relationships Between Production and Consumption. *Tourism Geographies* 2/1, 5–27.
- Williams, Allan, King, Russell, Warnes, Anthony, Patterson, Guy (2000b). Tourism and International Retirement Migration: New Forms of an Old Relationship in Southern Europe. *Tourism Geographies* 2/1, 28–49.

CONTEMPORARY PERIPATETIC ADAPTATIONS: MOBILITY, MARGINALITY AND INVENTIVENESS

Nataša ROGELJA¹

COBISS 1.01

ABSTRACT

Contemporary Peripatetic Adaptations: Mobility, Marginality and Inventiveness

The anthropological study of contemporary peripatetic adaptations is based on selected anthropological literature dealing with peripatetic nomadism, mobility and marginality as well as ethnographic research in which the author observed the lives of 'liveaboards' who travel and live on boats in the Eastern Mediterranean and elsewhere. The peripatetic group of liveaboards can be theorized within peripatetic nomadism, yet the surrounding context of global modernity that brings to the fore increased living standards, technological development, recession, redundancy and disillusion with national state system is of particular importance. In the first part the development of the anthropological perspective on peripatetic nomadism will be presented in order to discuss parallels between traditional and contemporary cases. In the second part a discussion of mobility, marginality and inventiveness will be developed in relation to contemporary ethnographic accounts.

KEY WORDS: peripatetic nomadism, marginality, mobility, peripatetic liveaboards

IZVLEČEK

Sodobne peripatetične adaptacije: Mobilnost, marginalnost in iznajdljivost

Antropološka študija sodobnih peripatetičnih adaptacij temelji na izbrani antropološki literaturi, ki obravnava peripatetični nomadizem, mobilnost in marginalnost, kot tudi na etnografski raziskavi na območju vzhodnega Mediterana, kjer je avtorica opazovala življenje »barkarjev«, ki združujejo delo in potovanje na jadrnicah v Mediteranu in drugod. Čeprav lahko peripatetično skupino barkarjev obravnavamo znotraj teoretičnega polja peripatetičnega nomadizma, pa je kontekst globalne modernosti, ki s seboj prinaša porast življenjskih standardov, tehnološki razvoj, recesijo, pojav odvečne delovne sile in razočaranje nad nacionalnimi državnimi sistemi, še posebej pomemben za razumevanje tega pojava. V prvem delu članka bo predstavljen razvoj antropološke perspektive na peripatetični nomadizem z namenom razpravljanja o vzporednicah med tradicionalnimi in sodobnimi primeri. Diskusija o mobilnosti, marginalnosti in iznajdljivosti se bo v drugem delu članka navezovala na sodobne etnografske primere. KLJUČNE BESEDE: peripatetični nomadizem, marginalnost, mobilnost, peripatetični barkarji

¹ PhD in Social Anthropology, Research Fellow; Slovenian Migration Institute, Scientific Research Centre of the Slovenian Academy of Sciences and Arts, Novi trg 2, SI-1000 Ljubljana; natasa.rogelja@zrc-sazu.si.

INTRODUCTION

Winter in the Peloponnese, December 2009. I am heading towards the unfinished marina at the end of the town, where the Dila is being dry docked this winter. The owners Trisha and Paul have invited me for tea. Paul has just come back from the boatyard where he has been grinding the boats' hulls. He is carrying a piece of dark blue canvas. Someone ordered a sail cover from him. The Dila can often be spotted in places such as unfinished marinas, anchorages at the edges of towns and remote fishing villages. In the park in front of the unfinished marina there are Roma people; in a shabby hut near the anchorage, once painted by Trisha's boys, there is a group of Pakistanis; parked next to the Dila is a hippy looking Dutch theatre boat with two men and a steel home-made sailboat belonging to a German family which is about to achieve their dream – to sail around the world; on the fishing boat parked near the Dila, three Egyptians, hired workers, live during the winter, earning money by fishing. Some of these people hardly communicate yet they share the same place. Their reasons for being there are different, their ends are incomparable, but the unfinished Greek marina is their common reality. The place is marginal but cosy. Nobody charges here; nobody comes here; one can get free water on the pier. The children sometimes play ball with the Pakistanis, the Roma children sometime steal bikes from Trisha's children, Trisha sometimes lends CDs to the Egyptians. She lends one, she lends another, and then she got warned by a French woman living on the land. "You should be careful with those people," the woman said. "Those people do not talk with us. They are weird!", say the Egyptians. Trisha still brings them CDs, and she still goes to the French expat parties. [...] Winter in Peloponnese, December 2011. The pier looks empty. Paul and Trisha are in the South Pacific, where Paul got a job in a construction site and anyway they wanted to move further, to experience new places. The Dutch theatre boat has sailed away to Southern France, to take part in a street theatre festival, the shabby hut is empty, the German family joined an eco-village and rented a piece of land to fulfil their second dream – to be self-sufficient and to grow their own food. The fishermen are probably somewhere out on the sea. Only the Roma are left in the park (Excerpts from fieldwork journal (2009–2011)).

The above fieldwork outline depicts the emergence of contemporary forms of mobilities and enclosures fostered, enabled and caused by post-industrial economic changes, neoliberal globalization and socio-technical transformations. It speaks about increased standards of living and technological development, as well as about recession, redundancy and disillusion with national state systems as expressed by many of my interlocutors. My involvement in this research is twofold. In the first two years I was involved in this lifestyle as an insider. As an unemployed anthropologist I was involved in precarious work as a free-lance journalist, living and travelling on a boat and fulfilling my dream of spending time with my children while travelling. During the following two years I worked on an anthropological project studying lifestyle migrations of liveaboards¹ in Greece and Turkey. Combining work and personal motives with mobile dwelling I realized that these lifestyles and livelihoods are characterized by a constant and loosely patterned travel much like traditional peripatetic nomads (see also Juntunen, Kalčić, Rogelja forthcoming; Rogelja 2012). Even though a series of parallels between the contemporary and traditional cases should not be ignored, the importance of the contemporary context of their lifestyles will be of special interest for this article. As for peripatetic liveaboards, I will argue that they can be theorized

1 The word liveaboards is used mainly in the Anglo-Saxon context to refer to people that live and travelling on sailboats or river boats. As the most popular sailing blogs and forums are in English language, the word liveaboards came into use also within the more general public, as was evident in my ethnographic research. Even though the term is used here as a general descriptor for all my interlocutors, differences in terminology between various cultural contexts should not be overlooked. Other liveaboard examples include liveaboards living on the European rivers, traditional examples from southeast Asia where several groups such as the Tanka, Moken and others live on boats and maintain nomadic lifestyles at sea or other local examples such as San Francisco Bay where during World War II, when housing was scarce, many labourers created living quarters from old boats and any other materials they could scrounge (A Short History of Liveaboards on the Bay 2001). Each of these examples must be put in a specific socio-historical context.

within peripatetic nomadism (with the exception of the ethnic dimension) (Berland, Salo 1986), yet the surrounding context of global modernity² in which people live highly mobile lives brings new peculiarities to the fore. Rapport and Amit (2002: 34–35) observed how economic globalization has changed the nature of human mobility and blurred the conventional distinctions between moving subjects. Furthermore, in the context of increased mobility the new mobilities paradigm takes the position that power relations are at the heart of the issue (Sheller 2011) and that “mobility is a resource to which not everyone has an equal relationship” (Skeggs 2004: 49 in Sheller 2011: 3). Following these observations I will develop a discussion leaning on the analytic concepts of mobility, marginality and inventiveness. On the basis of exposed ethnographic cases I argue that *mobility*, *marginality* and *inventiveness* lie at the heart of peripatetic adaptations and can thus offer a platform for comparison and understanding of the various frictions of contemporary mobile lifestyles.

PERIPATETIC NOMADISM AND ANTHROPOLOGY

In 1985, the *International Symposium on Peripatetic Societies*³ was held in order to increase the understanding of nomadic adaptations beyond the traditional domains of pastoral herding and hunter-gathering strategies (Berland, Salo 1986). One of the observations as well as questions highlighted at the symposium was the curiosity over the fact that peripatetics have been overlooked in the mainstream social sciences by historians, sociologists and anthropologists. As Berland and Salo (1986: 1) wrote, they have been either ignored or dismissed as social anomalies regardless of the numerous prehistoric, classic and modern records stating that countless rural and urban generations have experienced regular contacts with spatially mobile people such as craftsmen, entertainers, traders or transporters. However one can notice that there is a large body of romantic literature dealing with peripatetic communities or individuals as well as pseudo-scientific accounts producing stereotypes about peripatetic nomads prevalent among sedentary communities. One particularly exemplary example of European peripatetic nomads in popular as well as pseudo-scientific discussions are the Roma (Janko Spreizer 2002, 2011: 12). The imageries of innate migratory instinct and the cliché of the eternal Gypsy have developed into one of the most persistent stereotypes of peripatetic nomadism in Western culture.

The researchers attending the symposium agreed about the high level of diversity and heterogeneity of peripatetic nomads (Berland 1986: 189). Nevertheless, one of the common findings was the exploitation of social rather than natural resources among peripatetics, even though longer periods of sedentarism among nomadic groups have been recorded (Salo 1986: 7). In most cases, the accumulation of property (houses, land, etc.) or business establishments does not rule out mobility. As Berland and Salo (1986: 3–4) noted, the levels of mobility/sedentarisation are not viewed as opposites – as either desirable or undesirable conditions. Different states are thus perceived as potential opportunities. In fact, maintaining as wide a range of options as possible is one of the main and most persistent charac-

2 With reference to global modernity, various authors emphasize the sense of the world as a single place (Robertson 1992), time-space compression (Giddens 1990), increased involvement in the network society (Castells 2000) as well as post-industrial economic changes and neoliberal globalization. Arif Dirlik (2011: 4) writes about global modernity which is modernity globalized, where the political and economic integration of the globe has been accompanied by new fragmentations as well as intensification of earliest ones. The ethnography of live-aboards can be understood in the context of the economic globalization and technological development that has changed the nature of the human mobility and caused new fragmentations resulting in blurred distinctions between moving subjects.

3 The symposium was held in Washington D.C. and coincided with the 1985 American Anthropological Association annual meeting. Nineteen international scholars attended and presented papers on their research among peripatetic communities. The papers were published in December 1986 in a special issue of the journal *Nomadic People*.

teristics of peripatetics. To be sedentary for a certain period of time is seen as one of these options that should be kept open (*ibid.*). Flexible skills and knowledge about resources in the larger social system they exploit (including the knowledge of several languages) is furthermore one of the important characteristics of peripatetic adaptations noted by numerous authors (Acton 1981; Berland 1986; Berland, Rao 2004; Heyden 1979). As such they are sensitive to changes in social as well as economic circumstances, and as Berland and Salo (1986: 3) wrote, it is often their knowledge of political, economic and ecological factors that motivates their patterns of mobility as well as influence the choice of certain skills, goods and services. Researchers also noticed that not all patterns of mobility are economically determined, but they can be also related to curiosity, the desire to explore a new region or to certain political constraints (Berland, Salo 1986; Gulliver 1975) and a fact that they cherish freedom of movement (Berland 1986: 197).

A strong sense of ethnic identity, exclusiveness, endogamy, attachment to the values of cultural tradition, and a sense of separation from the larger social systems are also among the listed characteristics of peripatetic nomads (Berland, Salo 1986: 4). Another of their peculiarities is the ability to maintain a wide range of social relations from nobility to beggars (*ibid.*: 4). Furthermore, the negative attitude of sedentary groups towards spatially mobile people, especially towards peripatetic communities, is also documented. Descriptors such as Gypsy (Janko Spreizer 2004) or Khanabadosh (people who carry their houses on the shoulders) in the case of peripatetics in Pakistan (Berland 1986: 198) carry a strong negative connotations. Nevertheless, negative connotations work both ways. As Berland (*ibid.*) noted, the peripatetics also view sedentarists with considerable disdain.

Despite the ethnographic accounts, questions, dilemmas and different categorizations among researchers of nomadism and peripateticism still remain. What and who can be categorized as nomadic? How widely can the concept of nomadism reach? Is it necessary to relate the term peripatetic nomadism to a group of people or should it also encompass individual travellers? What kind of degree of nomadism is required to talk about people as peripatetic nomads? The sociologist Thomas Acton defined nomadism as an economic phenomenon, challenging the culturalist perspective, stating that nomadism gives rise to culture (or can be culturally informed) but is not culturally inherent (Acton 2010: 8).

Recent approaches to nomadism take several directions; they either relativize the boundaries between mobile Westerners⁴ and contemporary nomads (Kohl 2009), apply a much wider perspective of nomadism and its sub-categories, also encompassing individual travellers (McVeigh 1997: 9), speak of nomadic theory as grounded in masculine subjectivity that ignores the gendered production of space (Skeggs 2004), develop the philosophy of nomadology (Deleuze, Guattari 1980) or alter the nomadic concept into new contemporary variations they call neo-nomadism (D'Andrea 2006), professional peripatetics (Amit 2007b), peripatetic liveaboards (Rogelja 2012) or Western peripatetic road nomads (Kalčić 2012). All of these contemporary variations should be recognized and explained within the power of discourses, practices and infrastructures of mobility that create the effects of both movement and stasis (Sheller 2011: 2).

CONTEMPORARY PERIPATETIC ADAPTATIONS

In the face of the neoliberal globalization and technological development that forces and enables people to have mobile lives and/or peripatetic careers and makes it impossible for others to move, the questions of nomadism and sedentarism seem highly relevant. In his article on the relation between sedentarism and nomadism, McVeigh (1997: 9) defined sedentarism as a system of ideas and practices

⁴ The term Westerner is used as a loosely defined category that refers to people from the more affluent countries of Western Europe, and from the countries with firm historical, cultural and ethnic ties to Western Europe (The United States, Canada, New Zealand, Australia; see Juntunen, Kalčić, Rogelja forthcoming).

which serves to normalize and reproduce sedentary modes of existence and pathologies and repress nomadic modes of existence. As McVeigh (ibid.: 17) continues in his discussion on nomadic-sedentary transitions, the final triumph of sedentarism was represented by the arrival of two distinct but related phenomena in human history – the nation state and modernity. Consequently, with the arrival of national state borders, rules and restrictions, there were fewer and fewer places for nomads to move on to. Apart from the border regime there were also intellectual and spiritual dimensions to the drive for order and control. “A continued existence of nomads was a key symbol of the survival of unwanted elements from the pre-modern” (ibid.: 18). Ethnographic documentation of restrictions with respect to traditional nomadic groups has been gathered all over the world, and historical records show that certain groups, e.g. the nomadic pastoralist group the Maasai, were actually more physically mobile in the past than now (Salazar 2010: 3). Furthermore the “Gypsy problem” and the “vagrancy problem” have been addressed with genocidal implications and have resulted in legislation such as the Criminal Justice and Public Order Act of 1994 in England which threatens the survival of New Travellers and nomads alike by criminalizing all those who lead a nomadic life (1997: 8). Besides the actual motion that has been a source of concern to European states for centuries (McVeigh 1997: 8), the alternative sedentary practices that resemble nomadism also represent stumbling blocks for the national states. The recent events in France, where the Sarkozy government introduced the new crime bill (in 2010) in order to raid the Roma camps, connected the individualized actions of the younger French generation, who moved sporadically to rural areas and built yurts in search of an alternative or cheaper lifestyle, with “traditional” peripatetic groups. As the proposed crime bill includes a clause that gives local officials more power to break up “illegal installations that threaten public health, security or tranquillity” (Yurts Cause Controversy in France 2013), many yurt dwellers (called modern nomads on internet sites) (ibid.) were afraid that this legislation would be used against them.

Mobility

If travelling was once the domain of the world’s relatively affluent people, today the number and strata of people who travel have changed radically. As Amit (2007: 2) noted, today we are dealing with many active participants whose wealth may be relatively modest or they may even fall into the category of poor, unemployed or redundant citizens (Berntsen 2011; Kalčić 2012: 103). Economic prosperity is thus not the main clue to their mobility; having the “right” citizenship, the cultural myth of travel and escape, technology (the development of transportation, navigational and communications technology) are all significant factors, and even the recession plays an equal if not more important role. According to ethnographic data gathered in the course of the 21st century, an increasing number of people have adopted mobility as a way of life (Amit 2007; D’Andrea 2006; Elliot, Urry 2010). In these cases mobility and work can be mutually connected and the blurring of the boundaries between leisure and work appears (Amit 2007: 4). As Amit (ibid.: 5) wrote: “An increasingly important segment of ‘guest’ workers, a status once identify with relatively disadvantaged migrants, is thus now ironically comprised of middle-class Western youth”. Many researchers agree that detailed ethnographic work within the “new mobility context” should bring to the fore new researchable entities and unexpected relationships (Sheller 2011: 8), and reflect critically on romanticized notions of travel and nomadism (Martin 2002: 733).

Observing mobile professionals from Canada working on projects founded by national and multi-lateral aid agencies or development banks, Amit (2007b) reported on peripatetic professionals, mostly consultants, who travel/work three to six months per year. He noted that the spatial mobility of these “international consultants” entailed an acute compartmentalization between the work and domestic spheres of relationships (Amit, Rapport: 2007: 61). Being highly mobile, these professionals were on one hand disconnected from the social environment of the company they worked for and on the other their absences engender a sense of displacement even at “home” (ibid.: 62). Nevertheless, as Amit (2007b)

pointed out in observing transnational consultants and expatriate professionals (Amit, Rapport 2002: 33), the cultural motivations connected with adventure and travel are also a significant part of these stories.

Anthony D'Andrea (2006) on the other hand was involved in an ethnographic project in Ibiza and Goa observing a highly mobile group of people that integrated mobility into their economic strategies and expressive lifestyles. He calls them expressive expatriates or global nomads, who embody a special type of agency informed by cultural motivations that defy economic rationale. Their cultural hyper-mobility is characterized by mobility and marginality, a dyad that is not unique only to neo-nomads but has also been found historically among traditional nomads (2006: 106). On the other hand the cultural motivations of D'Andrea's interlocutors must also be understood in the context of values that were born in the USA in the 60s and in Europe in the 70s and had a big influence on contemporary generations.

Peripatetic liveboards⁵ form a special yet comparable phenomenon to the cases discussed above. In the second part of the 20th century long-term cruising on small sailboats was no longer exclusively connected with "heroic actions", sporting achievements or short-term amateur sailing excursions, but was supplemented with long-term living and/or travelling on sailboats. Especially in France, in the context of the protests of 1968, characterized by rebellions against military, capitalist, and bureaucratic elites, the anti-consumerism movement as well as the example of the famous French sailor Bernard Moitessier,⁶ many young people engaged in a liveboard lifestyle by constructing their own home-made boats from second hand materials and "sailed away". These "pioneers" were later followed by people with various backgrounds. Nowadays, as a result of the opening of internal borders within the EU and the rapid development of affordable navigation technology, there is according to my ethnographic data a constantly increasing number of people in the Mediterranean who have adopted a lifestyle that revolves around living, working and travelling on boats. As stated elsewhere (Rogelja 2012) the liveboard phenomenon is a highly diversified – touching on several migration forms such as IRM (International Retirement Migration), long-term (sabbatical) travel, tourism, lifestyle migration and connected with several historical contexts.⁷ The vast majority of peripatetic liveboards can be distinguished from other liveboards by several characteristics: they are highly mobile, they use their boat as their home most of the time, they earn money while they travel, their work position is precarious and one can trace several parallels between peripatetic liveboards and the urban-rural migration described for example by Hoey (2010) or the yurt movement in France (Yurts Cause Controversy in France 2013). They usually move in the Eastern Mediterranean region (mostly Greece and Turkey), the Caribbean, the South Pacific and South-East Asia, and hold American, Canadian, Australian, New Zealand and European passports. Mostly they are still of working age and the majority travel with their partners, although families and single men are not rare. Liveboards represent different social strata and age groups, they have widely varying sailing experience (from none to sailing instructors and competitors) and their break with their sedentary life occurred in a variety of ways (Juntunen, Kalčić, Rogelja forthcoming; Rogelja 2012). The broader beginning is usually marked with the books they read, with the stories they heard (usually

5 Even though ethnographic data also reveal the emic use of the word liveboards, the differences in terminology between various cultural contexts when referring to sailors should not be overlooked (see also footnote 2 in this article). The word liveboards came into use among people living on boats and coming from different cultural contexts in pragmatic terms and not so much in the sense of community or belonging, as was evident in my ethnographic research. For the purposes of this paper, I will use it as a descriptor.

6 Apart from his books where he writes about distancing himself from consumerism and environmental destruction in the West, he became almost a legend with his public gesture of *stepping out*. In 1968 he participated in the *Sunday Times Golden Globe Race*, which would reward the first and the fastest sailor to circumnavigate the Earth solo and non-stop. Although Moitessier had a good chance of winning, he quit the race and sailed to Tahiti rather than returning to England.

7 In the British context the long nautical tradition mixed with romantic sea imagery and the tradition of river boat liveboards is of special significance.



Figure 1: Vonitsa (Photo: Nataša Rogelja, Greece 2009).



Figure 2: Vonitsa (Photo: Nataša Rogelja, Greece 2009).

about a man who sailed off) or with childhood experiences with the sea or sailing. The concrete instances, the point when the departure happened, is on the other hand usually connected with a very specific event – the possibility of early retirement, being made redundant, a political event, blocked career choices, disease, divorce or accident, the birth of children, to set up on one's own (in the case of the younger generation) or inheritance as well as various other kinds of circumstances that enable the beginning of the journey.

Groupings of liveboards are situational and momentary, usually appearing in the winter periods.⁸ Similarly to how Amit (2002) described temporary communities, groupings of liveboards arise out of individuals' search for identity and personal fulfilment through temporal collective participation. Even though the term liveboards is used frequently during interviews (also in the form of "liveboard community" or "sailing community"), my interlocutors hardly ever expressed any sense of belonging to the "liveboard community". Despite this, my interlocutors expressed a wish to meet other liveboards (whom they called liveboards or sailors) in order to share lifestyle experiences or to form temporary groupings. The personal networks which develop in these temporary communities are an important source of information and are maintained long after the grouping occurs.

Being without regular income, people who live and travel on boats have to resort to various flexible economic strategies; temporary work in marinas and construction sites (offering various skills such as canvas repairing, sailmaking, painting, grinding), periodic work in agriculture and fishing, long-distance work through the Internet, chartering, boat delivering or entertainment work (such as the theatre boats). Even though peripatetic liveboards' travel routes are often outcomes of spontaneous decision making, by no means do they wonder aimlessly. Destinations keep changing along the travel trajectory, largely depending on the social, political, economic and climatic conditions in the localities traversed and on the availability of the work. Seasonal rhythms of mobility between touristic centres, home countries and winter locations in the Mediterranean following various work arrangements were also not infrequent.⁹

Marginality

For those from more prosperous Western backgrounds, constant movement is often portrayed as a positive experience and a conscious choice. However with time the romantic visions of the mobile life are changed and supplemented with the concrete experiences that bring to the fore more critical views of mobile life. During my fieldwork I noticed that marginalization, uprootedness and dispossession may come for Westerners¹⁰ later on, as a cost of this way of living, a fact which is often overlooked by anthropologists dealing with relatively privileged people. As Amit wrote, "What is most disappointing about the anthropological tendency to over-privilege peoplehood in explicating contemporary patterns and conceptions of movement is the resulting failure fully to engage with some of the internal contradictions and costs of separation, flexibility and cosmopolitanism which weave through other travelling accounts" (2002: 37).

Before going further into ethnographic details it is essential to explore briefly the analytical potential of the notion of marginality for understanding contemporary peripatetic adaptations. The link between marginality, poverty and vulnerability has often been stressed by geographers and measured in economic indicators (Coudouel et al. 2004; Gerster 2000; Gurung, Kollmair 2005). This understanding of marginality is undoubtedly relevant in many different social contexts, yet detailed ethnographic case studies may bring serious challenges to the fore. Sarah Green (2005: 2) among others has pointed out that marginality implies a difficult and ambivalent relation to the "heart of the things". In her eth-

⁸ This is true for the Mediterranean where the sailing conditions are difficult during the winter.

⁹ This is especially connected with the Mediterranean area due to the climate conditions.

¹⁰ See footnote 3 of this article.

nographic study in the Pogoni region, marginality can be understood as the lack of particularity (2005: 13). In other contemporary ethnographic accounts of Greece (e.g. Herzfeld 1997; Serematakis 1991; Papataxiarchis 1999), marginality has been closely associated with accentuated otherness, resistance and social critique, together with claims to empowerment. In the Indonesian context, Anna Tsing (1993) largely follows the same line of argument, indicating that marginality is often turned against the centre in order to destabilize central authority, and thus implies the idea of redemption. The case of peripatetic liveboards can be set in relation with to the understanding of marginality. It can be understood through uprootedness and dispossession (as in the case of the hyper-mobile lifestyle whose adherents had their positions in their home countries blocked once they left), it speaks about a world of fluidity, ambiguity and uncertainty (future plans are blurred, made according to the given situation, uncertain and without economic security; many peripatetic liveboards do not have right to basic health insurance since they lack a permanent address, etc.) but also about inventiveness and the possibility of making something new out of invisibility and in-betweenness.

Invisibility and in-betweenness is in the case of peripatetic liveboards true the in administrative sense (permanent address) as well as in ways of self-expression. Many of my interlocutors expressed the feeling that they do not belong entirely to their home society or to the societies they traverse.¹¹ In time, the old relations with friends back home seem to fade, which leads to a feeling of alienation. As one of my interlocutors said, "I have a feeling I am disappearing for the folks back home!" However, national flags are still an important element of recognition among liveboards, even though the attachment to the home country and fellow citizens are used pragmatically and critiques towards national state regimes are common. Invisibility is another important issue. They usually do not travel in groups. If they travel together it is at the most two or three boats together and for a limited period of time. In exceptional cases a flotilla of 8-10 boats is formed in areas known for having piracy problems. Some maintain contacts or share information via the internet long after the actual grouping occurred (see also Juntunen, Kalčić, Rogelja forthcoming; Rogelja 2013). These "communities" are characteristically situational, fluid and composed of people with multiple and simultaneous attachments to several such groupings. The basic clues to understanding their communality are thus situational circumstances and personal networks.

Inventiveness

It has been noted that under current economic and political conditions and imperatives people are experiencing different forms of distress that can be seen as a direct consequence of the political and economic crisis (producing social tensions such as deprivation of security and home, violation of fundamental values, marginalization, redundancy in early 50s, youth unemployment, etc.) but it can be also seen as an isolated phenomenon referring to a crisis of deeply moral dimensions which has violated peoples' fundamental values and produced feelings of disconnectedness (Hoey 2010) and a lack of critical spatial and temporal stability (Sennet 1998).

In the case of peripatetic liveboards, mobility can be recognized as creative individualized action aiming towards improving life. The main issues driving the inventive strategies of the peripatetic liveboards are: how to earn money and how to live economically, how to get around the official rules as

11 Nevertheless, many (mostly British, French and German) liveboards maintain contacts with their fellow citizens. Especially in the Mediterranean, British, German and French expatriates represent an important point of contact for liveboards. This network is important for assistance and information concerning social and political conditions, market prices and health care services in the places they traverse. Apart from this connection they engage in temporal multi-national communities interacting frequently in unofficial marinas, sharing information on proper anchorages, and vital resources such as water and electricity as well as information about job opportunities.

well as how to avoid unofficial expectations and standards (for example not to be charged as ordinary tourists), and how to use the symbolic capital (of their status as sailors, Westerners, travellers, etc.).

The first two questions are directly related to the ability to gather as much information as possible. Information is gathered in contacts between liveaboards, some maintain contacts with their fellow citizens on land or they gather information among the local population (usually from the owners and workers in the boatyards, bar owners, fishermen, etc.). The internet is an important source of information gathering and communication. Peripatetic liveaboards usually rely heavily on ICT technology; they use it for their work (advertising charter activities, translation work, freelance journalism, etc.) for communication with friends and family, as “memory” storage (photos) and as navigational devices (with the appearance of electronic charts that can be synchronized with GPS, computers or mobile phones are also used as navigational devices). Usually they possess a great variety of knowledge and skills and are very flexible when it comes to job opportunities.

Fritz, a German civil engineer in his late forties, for example, has held a variety of jobs in his 15 years of peripatetic existence. He has worked at private construction sites in the villages and towns he traversed; he has worked on other peoples’ boats maintaining engines, doing repair work on fibreglass, wood and steel boats; he ran charters on his boat for several years during the summer; he occasionally writes for several German newspapers; he occasionally returns to Germany if some odd job appears; while staying in the Canary Islands he worked as a boat surveyor and yacht broker; he also took a job delivering boats around the Mediterranean and in the future he plans to do educational tours for Rudolf Steiner primary schools.¹² Some of the work positions he holds (e.g. at construction sites) are the same positions that were once identified with relatively disadvantaged migrants.

Living economically is another strategy; it includes staying at anchorages or at free berths (such as unfinished marinas, fishing ports or city piers), handling all the maintenance jobs on the boat by themselves and living a modest lifestyle in general.

With regard to official national legislation, peripatetic liveaboards constantly “balance their lives between two ends” (Juntunen, Kalčić, Rogelja forthcoming). They stay invisible in order to “minimize the contacts with state bureaucracy, but they also maximize the benefits granted by the citizenship and legal residence” (ibid). For these reasons, peripatetic liveaboards “apply various inventive strategies that arise out of their marginality/in-betweenness in order to convince the state authorities that they have a permanent address and are thus available for authorities when needed” (Juntunen, Kalčić, Rogelja forthcoming; see also Rogelja 2012).¹³ Another equally important inventive strategy is the ability to “juggle” established cultural imageries and myths of freedom, the sea, escape, romance of travel, etc.¹⁴ On Corfu, the unofficial harbourmaster who normally charges for berths within the city port told me that he did not charge a French couple since they are “round-the-world travellers and not ordinary tourists”. A German family that I met in Corinth Channel on the other hand explained to me that they often use travel as camouflage in front of their family, friends and school back home. At the same time they also stated that they are very inclined towards travelling and sailing but their first reason to abandon the sedentary life was connected with the idea of spending more quality time together. Due to several reasons (high cost of living, long working hours in order to pay the bills, etc.) this was not possible for them in Germany. As the mother explained: “It would be weird to go and live somewhere in the mountains in order to spend time together. [...] If you say I travel you are normal. [...] If you say I sail you are like a hero.”

12 Rudolf Steiner schools, also known as Waldorf schools, apply is a humanistic approach to pedagogy based on the educational philosophy of the Austrian philosopher Rudolf Steiner, the founder of anthroposophy.

13 Obtaining personal documents, certificates, licenses, participation in the banking system and health insurance in most cases require a permanent address.

14 Cultural perceptions of the sea are an important component for understanding the cultural motivation of liveaboards, but are not subject of this article and are mentioned only sporadically in relation to ethnographic data that refers to the inventive strategies of liveaboards.

FINAL REMARKS, OR HOW WE CAN THINK ABOUT CONTEMPORARY PERIPATETIC NOMADISM

Marginality, mobility and inventiveness, the characteristics highlighted by Juntunen, Kalčić and Rogelja (forthcoming) when describing marginal mobility, stand in close relation to various peripatetic adaptations. On one hand nomadism can be positioned at the margins of the sedentary oriented “centres”, on the other hand, the ethnography of peripatetic liveboards speaks about a world of fluidity, uncertainty and inventiveness (ibid). In such cases, marginality becomes a central adaptation for escape, subversion and creative actions. On the basis of ethnography of liveboards (Rogelja 2012), the contemporary peripatetic adaptations can also be understood as a practice of resilience, as an integral part of life strategies aiming to improve the individual’s circumstances. To stay mobile or merely to emerge in the Western dream of “hyper-mobility” enables individuals to deal with blocked careers, redundancy, youth unemployment and disorientation.

Following the introductory excerpts from the fieldwork journal we can also see that people meet who would not have met in everyday life, categories that seemed clear become blurred and life itself becomes ironic as never before. This is not to say that the fluidity of the social world and contacts between people didn’t exist before or that the boundaries are disappearing. With the increased mobility of people, objects and ideas, the fluidity of life and the banal injustices (migrant regimes, systems of surveillance, racist and xenophobic practices and discourses etc.) simply became more evident than ever before and “new fragmentations as well as the intensification of earlier ones appeared” (Dirlik 2011: 4). If the “travelling underworld” of peripatetics has been a source of concern for European states for centuries, as McVeigh (1997) observed, today both those who do not move right and those who do not dwell right have become stigmatized by the national state regimes. It seems that in this reflexive theatre nomadism becomes a façade not only for those who make legal adjustments but also for those who try to subvert them and use the peripatetic lifestyle as a resilience strategy.

ACKNOWLEDGEMENTS

I would like to thank the two anonymous reviewers and Alenka Janko Spreizer and Špela Kalčić for their comments.

REFERENCES

- A Short History of Liveboards on the Bay (2001), http://www.baycrossings.com/Archives/2001/07_August/barging_in.htm (17 May 2013).
- Acton, Thomas (1981). Gypsylorism in the Far East. *Newsletter of the Gypsy Lore Society* 4/1, 2–6.
- Acton, Thomas (2010). Theorising Mobility: Migration, Nomadism and the Social Reconstruction of Ethnicity. *Romani Mobilities in Europe: Multidisciplinary Perspective*. Conference proceedings (ed. Nando Sigona). Oxford: Oxford University, Refugee Studies Centre, 5–11.
- Amit, Vered (2007a). Structures and Dispositions of Travel and Movement. *Going First Class? New Approaches to Privileged Travel and Movement* (ed. Vered Amit). New York, Oxford: Berghahn Books, 1–14.
- Amit Vered (2007b). Globalisation through “Weak Ties”. A Study of Transnational Networks among Mobile Professionals. *Going First Class? New Approaches to Privileged Travel and Movement* (ed. Vered Amit). New York, Oxford: Berghahn Books, 53–71.
- Amit, Vered, Nigel Rapport (2002). *The Trouble with Community. Anthropological Reflections on Movement, Identity and Collectivity*. London: Pluto Press.

- Berland, Joseph C. (1992). Territorial Activities among Peripatetic Peoples in Pakistan. *Mobility and Territoriality. Social and Spatial Boundaries among Foragers, Fishers, Pastoralists and Peripatetics* (eds. Michael J. Casimir, Aparna Rao). New York/Oxford: Berg, 375–396.
- Berland, Joseph C. (1986). Paryatan: Native Models of Peripatetic Strategies in Pakistan. *Peripatetic peoples. Nomadic Peoples* 21/22, 188–205.
- Berland, Joseph C., Aparna Rao (eds.) (2004). *Costumary Strangers. New Perspectives on Peripatetic Peoples in the Middle East, Africa and Asia*. London: Praeger.
- Berland, Joseph C., Matt T. Salo (1986). Peripatetic Communities: An Introduction. *Peripatetic peoples. Nomadic Peoples* 21/22, 1–6.
- Berntsen, Lisa (2011). Staying Mobile: Resilient Mobility Strategy of Transnational Workers in the European Construction Industry (paper presented at the conference). *The Resilience of People in Motion: Processes of Immigration, Transmigration and Remigration in the Wider Europe Today*. International conference. University of Trier.
- Castells, Manuel (2000b). *The Rise of Network Society*. London: Blackwell Publishers.
- Coudouel, Aline, Hentschel, Jesko S., Wodon, Quentin T (2004). Poverty Measurement and Analysis. *World Bank Poverty Reduction Strategies (PRSP), sourcebook*, 27–74.
- D'Andrea, Anthony (2006). Neo-Nomadism: A Theory of Post-Identitarian Mobility in the Global Age. *Mobilities* 1/1, 95–119.
- Deleuze, Gilles, Guattari, Felix (1980). *A Thousand Plateaus: Capitalism and Schizophrenia*. Minneapolis, MN: University of Minnesota.
- Dirlik, Arif (2011). Guoxue/National Learning in the Age of Global Modernity. *China Perspectives* 1, 4–13.
- Elliott, Anthony, Urry, John (2010). *Mobile Lives*. London, New York: Routledge.
- Gerster, Richard (2000). Alternative Approaches to Poverty Reduction Strategies. *SDC Working Paper* 1. Bern, Switzerland.
- Giddens, Anthony (1990). *The Consequences of Modernity*. Cambridge: Cambridge University Press.
- Green, Sarah (2005). *Notes from the Balkans. Locating Marginality and Ambiguity on the Greek Albanian Border*. Princeton: Princeton University Press.
- Gulliver, Philip (1975). Nomadic Movements: Causes and Implications. *Pastoralism in Tropical Africa* (ed. Theodore Monod). London: Oxford University Press, 369–386.
- Gurung, Ghana S., Kollmair, Michael (2005). *Marginality: Concepts and their Limitations*. IP6 Working Paper Series 6, <http://www.nccr-pakistan.org/publications.html> (19 Aug. 2010).
- Herzfeld, Michael (1997). *Cultural Intimacy: Social Poetics in the Nation-State*. New York: Routledge.
- Heyden, Robert (1979). The Cultural Ecology of Service Nomads. *The Eastern Anthropologist* 32/4, 297–309.
- Hoey, A. Brian (2010). Place for Personhood: Individual and Local Character in Lifestyle Migration. *Midwestern City and Society* 22/2, 237–261.
- Janko Spreizer, Alenka (2002). *Vedel sem, da sem Cigan – rodil sem se kot Rom: znanstveni razisem v raziskovanju Romov*. Ljubljana: Institutum Studiorum Humanitatis.
- Janko Spreizer, Alenka (2004). Cultural and Political Construction of Romani Ethnic Differences in Romological Discourse on Roma in Slovenia. *The anthropology of East Europe review* 22/2, 54–64.
- Janko Spreizer, Alenka (2011/12). Emotional Geographies of Exclusion in a Selected Roma Settlement. *Etudes Tsiganes. Nouvelle Série* 44/55, 174–189.
- Juntunen, Marko, Kalčić, Špela, Rogelja, Nataša (forthcoming). Mobility, Marginality and the Global Economic Recession. Western Nomads and Mobile Moroccan Men. *Nordic Journal of Migration Research*.
- Kalčić, Špela (2012). The Ethnography of Housetrucking in West Africa: Tourists, Travellers, Retired Migrants and Peripatetics. *Dve domovini/Two Homelands* 36, 101–118.
- Kohl, Ines (2009). *Beautiful Modern Nomads: Bordercrossing Tuareg between Niger, Algeria and Libya*. Berlin: Reimer.
- Martin, Greg (2002). New Age Travellers: Uproarious or Uprooted? *Sociology* 36/3, 723–735.

- McVeigh, Robbie (1997). Theorising Sedentarism: The Roots of Anti-Nomadism. *Gypsy Politics and Travelers Identity* (ed. Thomas Acton). Herfordshire: University of Herfordshire Press, 7–25.
- Papataxiarchis, Akis (1999). A Contest with Money: Gambling and the Politics of Disinterested Sociality in Aegean Greece. *Lilies of the field: marginal people who live for the moment* (eds. Sophie Day, Akis Papataxiarchis, Michael Stewart). Boulder, Colorado: Westview Press, 158–175.
- Robertson, Roland (1992). *Globalization: Social Theory and Global Culture*. London: Sage.
- Rogelja, Nataša (2012). Liveaboards in the Mediterranean: Luxury or Marginality? Ethnographic Reflections on Maritime Lifestyle Migrations. *Dve domovini/Two Homelands* 36, 119–130.
- Salazar, Noel B. (2010). *Envisioning Eden. Mobilizing Imaginaries in Tourism and Beyond*. New York, Oxford: Berghahn Books.
- Salo, Matt T. (1986). Peripatetic Adaptations in Historical Perspective. *Peripatetic peoples. Nomadic Peoples* 21/22, 6–36.
- Serematakis, Nadia (1991). *The Last Word: Women, Death, and Divination in Inner Mani*. Chicago: Chicago University Press.
- Sheller, Mimi (2011). Mobility. *Sociopedia.isa*, Drexel University.
- Skeggs, Beverley (2004). *Class, Self, Culture*. London: Routledge.
- Tsing, Ana L. (1993). *In the Realm of the Diamond Queen: Marginality in an Out-of-the-Way Place*. Princeton: Princeton University Press.
- Yurts Cause Controversy in France* (2013), <http://www.treehugger.com/sustainable-product-design/yurts-cause-controversy-in-france.html> (19 Feb. 2013).

MARGINALLY MOBILE? THE VULNERABLE LIFESTYLE OF WESTERNERS IN GOA

Mari KORPELA¹

COBISS 1.01

ABSTRACT

Marginally Mobile? The Vulnerable Lifestyle of Westerners in Goa

An increasing number of Westerners are leading lifestyles where they repeatedly spend long periods of time in Goa, India. This article discusses the phenomenon in terms of marginal mobility. The main focus is on the problems that the transnationally mobile lifestyle can cause for individuals. The article shows that the mobile lifestyle of the Westerners in Goa involves various vulnerabilities, for example in terms of personal crises, official residence status, visas and children's education. The article is based on extensive ethnographic research.

KEYWORDS: marginal mobility, sedentary norms, India

IZVLEČEK

Marginalno mobilni? Ranljivi življenjski stili med zahodnjaki v Goi

Naraščajoče število zahodnjakov oblikuje življenjski stil periodičnega preživljanja daljših obdobj v indijski Goi. Pričujoči članek tovrstni pojav obravnava skozi očišče marginalne mobilnosti. Pri tem se osredotoča na težave, ki jih od prevladujočih sedentarnih norm odstopajoči življenjski stil prinaša posameznikom. Članek pokaže, da transnacionalni mobilni življenjski stil zahodnjakov v Goi vključuje različne ranljivosti, na primer osebne težave, status uradnega bivališča, pridobivanje vize, izobrazba otrok. Prispevek temelji na obsežni etnografski raziskavi.

KLJUČNE BESEDE: marginalna mobilnost, sedentarne norme, Indija

The state of Goa on the western coast of India is a popular travel destination. Hippies arrived there in the late sixties, and since then Westerners in search of an alternative lifestyle have been gathering on the beaches of Goa every winter. Goa attracts Westerners because of its beaches and the trance music scene. Many of them are not just visiting tourists but spend several months there every year. For them, living in Goa is a lifestyle, not merely a temporary break from everyday routines in their countries of origin. Some of them spend winters in Goa and summers in their native countries, others spend winters in Goa and summers working at festivals around Europe, and still others are involved in irregular movement between Goa, Bali, Thailand, Ibiza, etc. Most of these people need to work in order to support their lifestyle. They work, for example, as fashion or jewellery designers (who sell their products in tourist

¹ PhD in social anthropology, Research Fellow; School of Social Sciences and Humanities, 33014 University of Tampere, Finland; mari.korpela@uta.fi.

markets), artists, yoga teachers, massage therapists or spiritual healers, or run restaurants, guesthouses or nurseries in Goa.

The Westerners in Goa come from various European countries, Israel, Australia, the USA and Canada, and they represent all age groups, from people in their 20s to people in their 70s. Most of them are from middle-class backgrounds. There are a rapidly increasing number of Western families with children leading the lifestyle as well. Very often, the parents are of different national origins and consequently their children spend time in three countries every year, sometimes also visiting other countries. Many of the children have lived for no more than a few months in the country which issued their passport, having spent most of their lives in Goa.

In this article, I will focus on the Westerners in Goa in terms of marginal mobility. I reflect on this empirical case in terms of the basic characteristics of marginal mobility outlined by Juntunen, Kalčić and Rogelja (forthcoming) and in particular, I focus on the problems that the mobile lifestyle can cause for individuals. I argue that because of their mobility, Westerners in Goa can gain much individual freedom and agency, but at the same time the lifestyle involves various vulnerabilities when anything unexpected and/or troublesome happens.

WHERE, WHY AND WHEN? RESEARCH METHODS AND MATERIAL

This article is based on my ethnographic research on Western children and families in Goa. The fieldwork lasted for ten months and was conducted in three parts during the winters of 2011, 2012 and 2013. While in Goa, I participated intensively in the lives of Western families with children aged 2–12 years. I spent time with them on the beaches, at pools, and in cafes and restaurants. I visited their homes, attended numerous children's birthday parties and observed various hobby groups. I also spent time in expatriate schools and nurseries.

My research material consists of detailed field diaries on my participant observation and of interviews with children, parents, and people who work with the children as well as young adults who have grown up in Goa. In the interviews, I focused on the interviewees' experiences and views on transnational mobility, home and belonging. In addition, I conducted drawing projects with children (on this method see e.g. Coates 2002). The children drew pictures in groups of two to five on various themes related to my research (home, Goa, India, and the other countries where they spend time, etc.). While the children were drawing, I chatted with them and recorded the discussions.

In this article, I use the somewhat problematic terms "West" and "Westerners". I use them as *emic* terms, that is, my research subjects and local Indians commonly use them. According to the Westerners themselves, being a Westerner means, above all, having a certain shared knowledge of popular culture, shared values (especially individualism), and similar educational background. The crucial issue in being a Westerner is being non-Indian, being a citizen of an affluent industrialised country. In similar terms, Juntunen, Kalčić and Rogelja (forthcoming), use the term "Westerner" as a loosely defined category that refers to people from the affluent countries of Western Europe, and from the countries with firm historical, cultural and ethnic ties to Western Europe such as the United States, Canada, New Zealand and Australia".

A MOBILE LIFESTYLE

A nomadic lifestyle is by definition a mobile lifestyle. Traditional nomads moved with their cattle (see e.g. Barfield 1993). Nomads use natural resources on the route (especially water and pastures) and/or sell

their goods and services to sedentary populations whom they encounter on the way. The latter group can be termed “peripatetic nomads” (Reynier 1995), and the Westerners in Goa can be seen as belonging to this category. However, they are peculiar in the sense that they do not earn their living from sedentary populations but from another mobile group, that is, from tourists. Instead of moving constantly, my research subjects spend long periods of time in Goa and often also in some other destination(s), either in their native countries or in Thailand, Ibiza, Bali, etc. Their routes and timetables are not necessarily fixed, but typically they return to the same places frequently. In fact, most of my research subjects have established permanent homes in Goa, with fancy furniture, fully equipped kitchens, etc. Yet they do not permanently live there, but regularly leave and stay away for several months. They are thus regularly – although not constantly – mobile. The Westerners do not live in Goa permanently for various reasons. Firstly, they need to leave India regularly in order to renew their visas. Secondly, many want to escape the heavy monsoon rains. Thirdly, those who are dependent on tourists for their income do not have customers in Goa during the monsoon months.

Although the Westerners are somewhat settled in Goa, they are very aware of the fact that they may move to another country in the future. A recent Facebook post illustrates this well:

Some cannot afford Goa prices for housing, food, etc. [anymore]... Cambodia seems to be easy on visas and spendings.

The quotation above presents the ethos among the Westerners in Goa very well: their lifestyle is about maximising one’s benefits. The Westerners want to live in a place where the cost of living is low, the climate warm and life relaxed. They also need to be able to earn money there. Their lifestyle is thus an attempt to utilize various circumstances to their own benefit. For many, mobility is a crucial strategy of their economic survival. At the same time, they also move because the destinations represent for them a relaxed way of life and they are understood to be countercultural centres of like-minded people (D’Andrea 2006: 105). Mobility is thus not an end but a means to attain the kind of life that they want. Yet, in spite of their long sojourns in specific locations, they are definitely not leading a sedentary lifestyle but are clearly transnationally mobile.

VOLUNTARY OR FORCED MOBILITY?

The Westerners in Goa present themselves in very individualistic terms (see Korpela forthcoming). They claim to be independent actors who have voluntarily chosen to improve their lives by leaving their sedentary lives in their countries of origin behind. They claim that the lifestyle between Goa and some other destinations has made them happier and they also are much better off financially.

One can, however, question how voluntary the choice has really been. As Nigel Fountain puts it: “in the 1960s the young dropped out, in the 1980s they are dropped out” (Fountain, cited in McKay 1996: 52), and this also seems to apply in the new millennium, and not only to youth but to people of all ages. Vered Amit, who has written extensively on expatriates, argues that the same situation of transnational mobility can be interpreted and experienced either as a structural imposition or as a personal choice (Amit 2006: 109). Westerners in Goa often say that they wanted to escape a lifestyle that in their view is dull, meaningless and suppressive to their individual needs. However, one can also argue that their options in their countries of origin may have been rather limited and moving abroad has thus been a rational choice which has clearly improved their income levels and quality of life. The lifestyle is, however, very vulnerable as I will discuss below.

UPROOTED, LIMINAL AND UN-POLITICAL?

In many respects, the Westerners in Goa can be characterized by uprootedness and liminality, like many other marginally mobile groups. Within the national order of things (Malkki 1995: 4–6), my research subjects are anomalies because they do not want to live in their countries of citizenship. By leaving their native countries, these Westerners have become outsiders there, but they are also not integrated (or not willing to become integrated) into Indian society, and are outsiders there as well.

At the same time, however, the Westerners create their own community in Goa. It is based on face-to-face interactions, and the members share certain values and practices in addition to sharing the same lifestyle. The feelings of belonging to this community can be very significant for the members, although at the same time the relationships are dispensable, as individuals may move away from Goa and often maintain very few, if any, relationships with the Goa community while away. Nevertheless, although dispensable, the relationships can be highly significant at a certain time (on a similar community in Varanasi, see Korpela 2009). I argue that creating the community of Westerners in Goa means creating a certain rootedness there.

I thus want to emphasise that although officially, from the point of view of the Indian state and the states of their native countries, these Westerners are outsiders occupying a liminal space, they are not necessarily uprooted but create their own roots and belonging in Goa or elsewhere where they reside among like-minded people. These roots may remain invisible to the sedentary populations but they may nevertheless be highly significant for the mobile individuals themselves. It is, however, not a politicised community, which contributes to it being invisible to many outsiders.

AGAINST THE SEDENTARY NORM

The Westerners in Goa do not live permanently in one country but regularly move between two or more countries. Consequently, their residence status is problematic from the point of view of states. The world is still very much organized according to the principle of sedentary lifestyle: one is supposed to be registered as an inhabitant in a certain location and then one is granted certain rights (and duties) in that place. In particular, this refers to rights in terms of property ownership or employment as well as political and legal rights, and in many countries (although not everywhere) rights regarding health care and social security. Not living a sedentary life may cause people to lose many of these rights in their native countries, and owing to their mobility they are not able to gain such rights elsewhere either. The mobile subjects are then left on their own – without state support – on many fronts. The Westerners in Goa themselves often emphasise that they are independent actors who do not need official structures and statuses. Circumstances may change, however, and being a non-recognised outsider may eventually cause problems. Being an independent actor and an outsider is a vulnerable position. Vered Amit has argued that a transnationally mobile lifestyle can lead to consequences that the individual did not anticipate when making the decision to abandon sedentary life; a transnationally mobile life has its contradictions and costs (see Amit 2002: 37; 2006). Below, I discuss some of the vulnerabilities that my research subjects face. I do not intend to claim that sedentary people do not face similar problems, but I argue that a mobile lifestyle makes one particularly vulnerable.

LIVING ON THE EDGE: THE TROUBLESOME CONSEQUENCES OF MOBILE LIVES

Families on their own

Adam and Sophie have two children and Sophie is pregnant with the third. They earn their living by selling leather clothes in the Goan tourist markets. Two weeks before Sophie's due date, Adam falls ill with pneumonia and cannot work for a while. When Sophie gives birth, Adam misses a few more markets as he takes care of the family when his wife recovers from the delivery. Two days after the baby is born, the oldest child gets chickenpox. Three weeks later, the middle child gets chickenpox and once she has recovered, Adam gets it and falls very ill. During these difficult weeks, the family's cleaning lady gets married and consequently resigns from her job. Adam and Sophie are struggling to run their everyday lives with three children. The situation is particularly stressful because the family is not getting any income: Sophie cannot work because she is taking care of the baby and Adam cannot work because he is ill (Field diary February–March 2012).

The story above illustrates well some of the vulnerabilities of the lifestyle of the Westerners in Goa. The lifestyle is very much built on the assumption that everything goes as planned; people stay healthy and continue working and travelling. Among the Westerners in Goa, people function either as individuals or as family units but larger support mechanisms are predominantly missing. The Westerners provide support to each other and there are specific Facebook groups where one can ask for advice from other expatriates in Goa. However, the fact that most Westerners do not live in Goa permanently sets clear limits to such support. Most (if not all) people with whom the Westerners socialise in Goa are frequently away from there for long periods, as a consequence of which whatever help and support is available at one point may not be there at another time. Moreover, some people are socially more connected than others, and the help given by friends is not necessarily very long-lasting. Adam and Sophie's friends helped them considerably during the difficult period described above, but helping with everyday tasks, although important, does not help with the financial situation, and if someone in the family had fallen seriously ill for a long time, the situation would quickly have become extremely difficult. Living in Goa without income or a decent savings is not possible, especially if one has children: one needs hundreds of euros every month for house rent and school fees alone. Moreover, regular flights abroad are costly (but necessary because of visa regulations).

The Western families living in Goa have limited support from relatives because they live so far away from them. Sometimes relatives do visit them and provide help with childcare and other tasks. Such support is, however, always only temporary since the relatives leave India sooner or later, usually within a few weeks. The lifestyle is thus very much based on a nuclear family. One mother whom I interviewed specifically pointed out that she is alone with her spouse and their children; they do not have support from relatives because they do not live in the same country as them but only visit there occasionally.

It's us alone with the kids. No family support (Ines, 45, two children).¹

Obviously, many sedentary families are lacking support from relatives in the West nowadays, too. However, I argue that there is a qualitative difference, since in the West one's life is usually more settled, or at least one has an image of stability, whereas in Goa, the Westerners' lives are from the very beginning built on the assumption of an insecure future and transnational mobility. Support from relatives is

¹ The interviewees' names used in this article are pseudonyms. The ages refer to their actual ages at the time of the interview.

explicitly not an option when living abroad. Domestic servants are much appreciated and they ease the life of the Westerners considerably in Goa. Such paid help is, however, problematic if one runs into financial trouble, and servants may also suddenly resign.

There are several single mothers among the Westerners in Goa and they seem to be very able to live between Goa and one or more other countries. Many even stated that it is in fact easier to be a single mother in Goa than it would be in their countries of origin because they can afford domestic help and babysitters in Goa. However, if a family with two parents ends up in a divorce, the crisis is particularly severe because their mobile lifestyle was built on the assumption of a functioning nuclear family. When a divorce occurs, the foundations of the lifestyle collapse, which often leads to the end of the mobile lifestyle. Very often the mother stays in her country of origin with the children while the father continues spending winters in Goa. Divorce is obviously an end to a certain lifestyle even for sedentary families, but the fact that the Westerners who divorce in Goa often end up moving to a different country after the divorce makes their situation more drastic; they need to start from scratch more concretely than those who have lived a sedentary life in their native countries prior to the divorce. Thus a transnationally mobile life can lead to a highly vulnerable situation if one faces personal crises such as illness or divorce. Such events are obviously also troublesome for sedentary people, but mobility adds another twist to the situation.

Outside official structures

If support from relatives is limited, support from the state is often non-existent. Since the Westerners do not live in their countries of origin, many of them have fallen out of the social security and health care systems that may exist in those countries. Even those who regularly return there have usually become ineligible for benefits, as their sojourns back "home" are not long enough and their contributions to the system are minimal or non-existent. The existence and scope of social security and public health care obviously varies greatly from country to country. Nevertheless, in most Western societies such systems exist at least to some extent, especially for members of the middle class (which includes most Westerners in Goa). None of my interviewees, however, considered dropping out of such systems a problem but viewed it as a preferred situation.

India is a very corrupt country. If you want something, you have to pay. In the north – in Sweden, Finland and Norway – everything is well organized and you do not need to pay. But there you are not free, they chain you (Lino, 48, three children).

Most Westerners in Goa prefer to be outside public welfare systems because they feel such systems control and restrict individuals too much, whereas they prefer to be "free". At the same time, they are not part of the Indian system either. They do not need or want Indian social security benefits (which are very limited or non-existent even for Indian citizens) but simply existing within the system would be useful sometimes: the lack of official registration can lead to various everyday problems (on the problems of registration of lifestyle migrants, see O'Reilly 2000: 142). They are in an ambiguous limbo state, which can be very problematic if things do not go as planned and they encounter difficulties (i.e. traffic accidents, robberies, arguments with landlords or business partners, etc.). As Lino's comment above indicates, Westerners often engage in bribing in India, that is, they try to solve things the unofficial way when the official one is not available (and sometimes also when it is available). Sometimes this strategy works, at other times it does not and they are in a very vulnerable position because the outcomes of such unofficial processes are uncertain. Moreover, they have to deal with the situations on their own and it is not necessarily a fair game. Similar problems (except for maybe bribing) obviously also exist in many Western countries, but being a non-registered foreigner makes the Westerners in Goa

feel particularly vulnerable. In addition, most of them are very aware of the rights they would have in many Western countries.

Not being registered in India can also lead to other problems. In addition to the administrative bases, the economic bases of the Westerners' lifestyle are insecure. The Westerners who earn their living in Goa often work in the informal sector, which seems to provide good profits but is without official recognition and legal protection; it is therefore a very vulnerable position. In fact, even if one works formally in Goa, one is very vulnerable as one is prone to changing local policies (without the right to affect them) and to the (sometimes surprising and sudden) actions of local administrators and politicians. Again, one may also face similar problems in one's native country, but non-registered foreigners are particularly powerless.

The Indian state seems not to want to recognise small businesses run by foreigners: the requirements for business visas are such that visas are granted only to people who invest and earn considerable sums of money.² However, although the small businesses are not officially recognised, they are extremely significant for many individuals whose income may come solely from these ventures. The ultimate risk of such small businesses is that if caught, one will not be able to obtain a new visa to India, which obviously means an end to the lifestyle.

The transnationally mobile lifestyle is thus problematic from the point of view of many official structures. In some respects, it is beneficial for individuals to stay outside societal structures – they are free to do what they want – but in certain situations, individuals may need such structures, and being unrecognised outsiders is tricky.

The eternal struggle with visas

One very significant vulnerability in this lifestyle is the Westerners' dependence on Indian visas. Most Westerners are in Goa on temporary visas – most on tourist visas, some on temporary business visas – and thus need to leave the country regularly in order to renew their visas.³

We still rely on the Indian authorities, so they will decide when the visa is given and when it is not given (Ines, 45, two children).

The structural bases for the lifestyle are thus very insecure: Westerners living in Goa can never know for sure whether their visas will be renewed or not.

In recent years, India has clearly tightened its policies regarding foreigners and has started to control their movements to a greater extent than in years past. India is a peculiar country because one can obtain tourist visas which are good for from six months to as much as ten years. Earlier, many Western long-term sojourners visited India's neighbouring countries (Nepal, Sri Lanka or Thailand) for short periods in order to renew their Indian visas. A few years ago, this practice was put to an end: one can now obtain a long-stay tourist visa to India only in one's country of origin, and once one has departed India when one's visa expires, one can re-enter only after staying outside of the country for at least two months. Even most people who have obtained business visas are required to leave India regularly. Moreover, as I mentioned earlier, business visas are not attainable for many Westerners in Goa because their income and business structure do not meet the requirements of such visas. India thus clearly

² In order to obtain a business visa, the gross sales from the business activities must be at least 135,000 euros a year, and a person holding a work visa must earn at least 20,000 euros per year (http://mha.nic.in/pdfs/work Visa_faq.pdf, accessed 4 June 2013).

³ Those who have permanent visas are married to Indian citizens, were born to an Indian parent or born in India before the early 1980s when one could get a permanent visa to India if one was born there.

wants to prevent foreigners from staying there permanently, although at the same time, long tourist stays are allowed.

The visa regulations are a constant topic of discussion among the Westerners in Goa, and people are trying to find ways to circumvent the increasingly strict and sometimes arbitrary rules. Even children are very aware of the visa issues. For example, 5-year-old Fred once told me that “sometimes people need to leave Goa because they have a visa problem”. In other words, visa issues are everyday reality for Western children and adults in Goa, and the adults often identify visa issues as the main obstacle to their lifestyle. Some Westerners have even stopped coming to Goa because they have not been able to obtain suitable visas and they have grown tired of the constant struggle to obtain visas. Even if they are determined to continue coming to Goa, they undergo continual stress and insecurity because they can never be sure which kind of visa is granted – if at all – and what new rules will be put into practice with the visa regulations.

Even in those families that have managed to obtain long-term (business) visas, the issue of visas can lead to a tricky situation when children become legal adults. As minors, they are accompanying their parent(s) in India, but once they reach the age of 18 they can no longer obtain visas as dependents of their parents. Consequently, some young Westerners end up being able to come to Goa only on six-month tourist visas although they have grown up there and consider the place their home.

According to the Indian state, most of my research subjects are either visiting tourists or conducting temporary business in Goa, although they consider themselves to be permanent residents of Goa, that is, they have no intention of leaving for good. One could in fact argue that many Westerners in Goa would like to be considered migrants in India, but the visa regulations force them to be officially tourists. The rules also force them into mobility. Although most Westerners in Goa enjoy their transnationally mobile lifestyle – and would not want to abandon it – the visa regulations force them into regular mobility even when they may not desire to move at particular times. Many of the Westerners in Goa say that they would like to stay there for much longer periods than the visas allow. During the monsoon rains, they might want to leave Goa but not necessarily India – decamping to the mountains in Northern India is popular during the monsoon months. Therefore, although some need to leave India in order to earn money elsewhere during the off-tourist season, others do not need to, or they could earn money from tourists in North India during the monsoon months as the peak tourist season in the north occurs at that time. All my research subjects consider mobility an important part of their lifestyle, but they would like to choose the timing and frequency of that mobility themselves, which is currently not always possible because of the visa regulations. Visas are thus a structural issue that sets limits (and frameworks) to their transnationally mobile life.

“We don’t need no education”: Mobile lives and children’s schooling

The mobile lifestyle also includes a potential vulnerability with regard to children, i.e. education. Combining a transnationally mobile life and children’s schooling is not an easy equation, especially when the visa regulations force families to leave India regularly. The Western families in Goa have various strategies regarding how to manage this, and the theme is widely discussed among the families.

According to the spirit of individualised freedom, some families have opted for home schooling (or as many prefer to call it, un-schooling). Most enrol their children in schools run by Westerners, and some children attend local Indian schools. Local schools are, however, not attainable for most families because they require attendance for the entire school year, which is impossible with short-term visas. In addition, most of the Western parents are strongly opposed to local schools, viewing them as too strict and uncreative in their approach.

The transnationally mobile lifestyle (which is partly a personal choice, partly a necessity dictated by visa policies and business ventures) prevents children from attending an entire school year in one

school. Some of the Western children in Goa attend schools in (one of) the parents' country of origin when they are there, while others do not. Countries also have different approaches to what is and what is not acceptable in terms of children's education. Some countries (e.g. the UK, Italy, Norway) allow home schooling, whereas others (e.g. Germany, Greece, Sweden) do not, and some countries follow the child's progress more carefully (with regular examinations) than others. Thus, problems with arranging children's education are another example of how being transnationally mobile leads to various kinds of negotiations with the rules and structures that are designed from the sedentary point of view.

However, in spite of various potential problems, many people manage to lead mobile lifestyles between Goa and other countries for decades. Those who succeed have found secure sources of income, for example a continuous market for the services or products that they sell. They have also stayed healthy and thus able to work. Many of them have managed to obtain long-term visas to India or they have organised their lives in such a way that the six-month-long tourist visas are enough.

CONCLUSION

The Westerners in Goa are an example of marginally mobile people. They keep returning to specific locations but do not (and cannot) stay there permanently. Being marginally mobile may be economically beneficial to individuals and it may offer them the individual freedom that they appreciate, as well as a personally meaningful lifestyle, but it is a highly vulnerable position. In this article, I have presented various practical issues where the mobile lifestyle between Goa and some other countries is vulnerable and may cause individuals to run into trouble. Crises in one's personal life, issues with health care, un-registered businesses, un-registered residency, visa regulations and children's schooling are issues that highlight some of the vulnerabilities of the transnationally mobile lives of Westerners in Goa. The article has shown that although individuals may opt out from the sedentary norm, they seem to bump into rules and structures targeted for sedentary populations again and again. The individuals try to navigate the various rules and structures of the sedentary norm the best they can. Challenging the sedentary norm quickly leads to a marginal position which in turn means a vulnerable lifestyle. Yet, many people are able to tackle the various vulnerabilities so that they manage to lead the mobile lifestyle for years or even decades.

REFERENCES

- Amit, Vered (2002). An Anthropology without Community? *The Trouble with Community. Anthropological Reflections on Movement, Identity and Collectivity* (Vered Amit, Nigel Rapport). London: Pluto Press.
- Amit, Vered (2006). Claiming Individuality through "Flexibility": Career Choices and Constraints among Traveling Consultants. *Claiming Individuality. The Cultural Politics of Distinction* (eds. Vered Amit, Noel Dyck). London: Pluto Press, 90–109.
- Barfield, Thomas (1993). *The Nomadic Alternative*. New Jersey: Prentice Hall.
- Coates, Elizabeth (2002). I Forgot the Sky! Children's Stories Contained Within Their Drawings. *International Journal of Early Years Education* 10/1, 21–35.
- D'Andrea, Anthony (2006). Neo-Nomadism: A Theory of Post-Identitarian Mobility in the Global Age. *Mobilities* 1/1, 95–119.
- Juntunen, Marko, Kalčić, Špela, Rogelja, Nataša (forthcoming). Mobility, Marginality and the Global Economic Recession. Western Nomads and Mobile Moroccan Men. *Nordic Journal of Migration Research*.
- Korpela, Mari (2009). *More Vibes in India. Westerners in Search of a Better Life in Varanasi*. Tampere: Tampere University Press.

- Korpela, Mari (forthcoming). Lifestyle of Freedom? Individualism and Lifestyle Migration. *Understanding Lifestyle Migration: Theoretical Approaches to Migration and the Quest for a Better Way of Life* (eds. Michaela Benson, Nick Osbaldiston). Hampshire: Palgrave.
- Malkki, Liisa (1995). *Purity and Exile: Violence, Memory, and National Cosmology among Hutu Refugees in Tanzania*. Chicago: University of Chicago Press.
- McKay, George (1996). *Senseless Acts of Beauty. Cultures of Resistance Since the Sixties*. London: Verso.
- O'Reilly, Karen (2000). *The British on the Costa del Sol. Transnational Identities and Local Communities*. London and New York: Routledge.
- Reyniers, Alain (1995). Migration, movement et identité. *Hommes et migrations* 1188–1189, juin–juillet 1995, 45–51.

VAGABONDS OR ELITES? THE MOBILE LIFESTYLE OF CONTEMPORARY TUAREG

Ines KOHL¹

COBISS 1.01

ABSTRACT

Vagabonds or Elites? The Mobile Lifestyle of Contemporary Tuareg

A large proportion of contemporary Tuareg no longer move in traditional nomadic cycles, but according to individual choice. Always on the move and in search of making a living, they drift between the Saharan states. Relatives and friends provide lodging; a small bag of personal effects and a mobile phone with beloved modern Tuareg guitar music complete their appearance. Their lifestyle may be characterized by the term “vagabonds”, but I shall argue that these people may also be seen as a certain elite of their society because of their mobility strategies. In my case study of Nigerian Tuareg moving between Niger, Algeria and Libya I respond to the characteristics of their mobility and lifestyle. I shall illustrate their strategies in dealing with the borders of the Saharan nation states, and clarify that “vagabonds” and “elites” are not inevitably mutually exclusive terms, and that moving may not be an exception of normal life, but can be the rule.

KEY WORDS: Tuareg, mobility, transnationality, elites, vagabonds

IZVLEČEK

Vagabundi ali elite? Tuaregi, moderni nomadi na poti

Večina Tuaregov ne sledi več tradicionalnim nomadskim ciklom in se premika po osebni izbiri. Venomer v gibanju in iskanju hitrega zaslužka drsijo med saharskimi državami. Sorodniki in prijatelji jim zagotavljajo nastanitev, majhna torba z osebnimi stvarmi in mobilni telefon z najljubšo moderno tuareško kitarsko glasbo pa zaokroža njihovo pojavo. Njihov življenjski stil bi lahko označili s terminom vagabund, vendar pa bi zaradi svojih mobilnih strategij ti ljudje lahko predstavljali tudi elito svoje družbe. V svoji študiji primera nigerskih Tuaregov, ki se premikajo med Nigrom, Alžirijo in Libijo, avtorica obravnava značilnosti njihove mobilnosti, ki je ni mogoče uvrstiti med konvencionalne kategorije. Nadalje ilustrira njihove strategije spoprijemanja z mejami med saharskimi nacionalnimi državami in pojasnjuje, da vagabundi in elite niso nujno medsebojno izključujoči se termini ter da premikanje ni nujno odklon od normalnega življenja, ampak je lahko tudi pravilo.

KLJUČNE BESEDE: Tuaregi, mobilnost, transnacionalnost, elite, moderni nomadi

¹ PhD in Social Anthropology, Research Fellow; Institute for Social Anthropology, Austrian Academy of Sciences, Apostelgasse 23, 1030 Vienna, Austria; ines.kohl@oeaw.ac.at.

BACKGROUND OF THE TUAREG'S CONTEMPORARY LIFESTYLE

The Tuareg¹ are a predominantly pastoral nomadic² society living in the Sahara and its Sahelian fringes. Since decolonization and the subsequent nation-building process in the 1950s and 1960s they have been attached to five states – Libya, Algeria, Niger, Mali, and Burkina Faso – where their political, economic and social participation has developed differently. In Libya and Algeria the Tuareg have been facing a rigorous Arabization policy (see Keenan 2004; Kohl 2007; Maddy-Weitzmann 2012), whereas Niger and Mali inaugurated a policy of administrative Africanization (Grégoire 1999; Lecocq 2010). The political participation of the Tuareg has been limited mostly to a local (partly only informal) level. Economically they have not profited from the rich mineral resources of their region, and on a social level the newborn nation states have reinforced their minority status (see Claudot-Hawad 2013).

During recent decades, the Tuareg's traditional lifeways of nomadism and pastoralism have been facing significant changes. Post-colonial dependencies, climatic and ecological crises, global economic interests, and local and supra-local attempts to enforce political hegemony have turned nomadic life into a challenging business (Kohl, Fischer 2010: 1). These developments have led to a dramatic decline in their way of life. Nomadism has virtually disappeared in Libya, and to a large extent also in Algeria. In Mali and Niger, where nomads were once the most prosperous, numerous and wealthy group, a steep population decline is evident (Claudot-Hawad 2006: 655). The Tuareg have increasingly been forced to switch to urban lifestyles, or have been forced into making transnational border crossings in order to make a living. Transnational mobility strategies, such those I describe in this paper,³ contribute to their new lifestyles.

Mobility has always been a crucial factor in functioning successfully in Africa (see De Bruijn, van Dijk, Foeken 2001), and in the Sahara mobility strategies contributed to a system of connectivity and linkage (see Austen 2010; McDougall, Scheele 2012). Trade, pilgrimage, and travel have been connected with collective wealth and economic, societal, political, cultural, religious, and psychological concerns (Claudot-Hawad 2002a: 8ff.). Especially for nomads, travel assisted in their understanding of their environment not only in terms of geography, but also in terms of politics, culture and society (ibid.: 9). Until the invention of the nation states the residents of the Sahara operated a network extending from the Arabian Peninsula to the West African sub-Saharan regions and up to the Mediterranean. The Sahara thus has never been an isolating barrier, but has been characterized throughout time by movements of people, goods and ideas (see Marfaing, Wippel 2004). European colonialism brought the disruption of the trans-Saharan links and profoundly altered the social, political and economic structure of the Tuareg. Colonial administration was imposed on the Tuareg and the once flexible, permeable nomadic boundaries between the various groups of the Tuareg were severed (Kohl, Fischer 2010: 4). With the decolonization process the Tuareg have experienced a final split into five completely different states

1 "Tuareg" is a foreign designation which has found entry into linguistics. Although I prefer their emic names *Imuhagh* (Algeria, Libya), *Imajeghen* (Niger), and *Imushagh* (Mali), I will use the term "Tuareg" in this paper, as it is easier for a broader readership. Note that "Tuareg" is plural, therefore I refrain from using the English pluralizing "s". Sing. fem.: Targia; sing. masc.: Targi.

2 Not all Tuareg have been nomads. Dida Badi (2012) suggests a new approach which considers the sedentary dimension of the Tuareg.

3 The material for this article was collected with Akidima Effad during ethnographic fieldwork in Libya, Algeria, and Niger between 2004 and 2012. During this time I was funded by the University of Vienna, the OMV and the Austrian Science Fund (P20790-G14 and P23573-G17). The research is based on a methodological combination of multi-sited ethnography, participant observation, travelling along with mobile subjects, and visual anthropology. Qualitative narrative interviews and informal interlocutions have been proven to be successful since the respondents responded to the specific opportunities and challenges in terms of trust, rapport, and access.

with diverging school systems, different lingua franca, varying economic opportunities, and unequal integration in politics. Impenetrable frontiers were set up in the Sahara as a clear manifestation of the modern state (ibid.: 5). The Tuareg's radius of movement has thus been restricted, their territory has experienced a breakdown of cohesion, and they have become pushed into the periphery in terms of global flows, contact and linkages.

The Tuareg way of life includes both regular cyclic nomadic movements (*aggal*) and irregular travels (*awezelu*) for various reasons such as pilgrimages, social visits, or education (Claudot-Hawad 2002b). But the recent forms of mobility of the Tuareg go beyond movements of nomads with their livestock, and beyond ordinary travel.

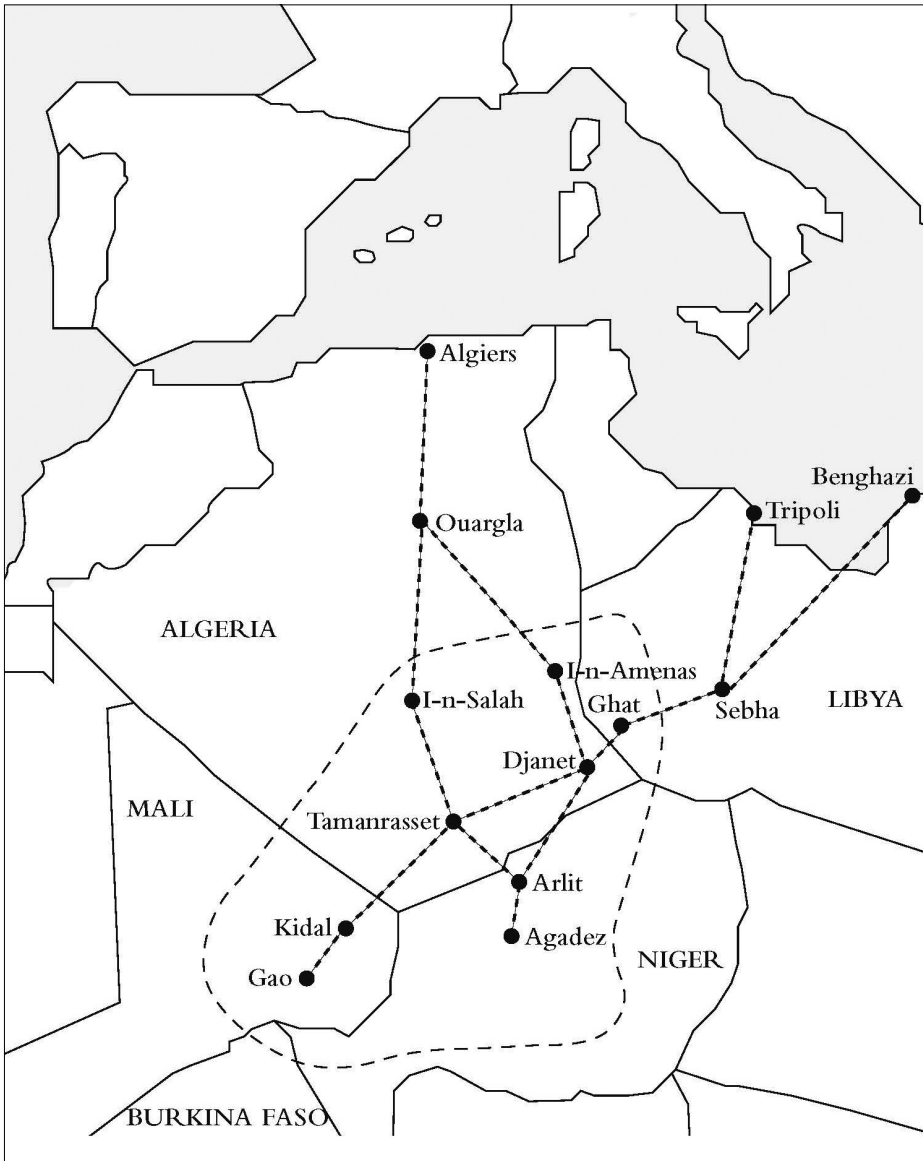


Figure 1: A map of the Tuareg's transnational mobility in the borderlands of Mali, Niger, Algeria and Libya. The dashed continuous circular line represents the traditional living environment of the Tuareg.

(Source: Kohl 2010, 451).

In this paper I will refer to Nigerian Tuareg from the Air Mountains (from Arlit, Agadez, and the surrounding nomadic sites) who currently move in a zigzag pattern irregularly between Niger, Algeria and Libya in order to make a living. This itinerant mobility is mostly pursued by young people, called *ishumar*.⁴ The term *ishumar* is derived from the French *chômeur* (unemployed person), and was transmuted into Tamasheq, the language of the Tuareg (Ag Aher 1990; Bourgeot 1995: 437ff.; Hawad 1991). Originally it described male unmarried Tuareg between 16 and 35 years old (Bourgeot 1995: 437) who gave up their nomadic life and went to neighbouring countries, particularly Algeria and Libya, to look for casual employment. Their lifestyle represented a change from a nomadic to a vagabond way of life (ibid.), and highlighted their ruptured environment.

The term has changed its meaning since first emerging 40 years ago. It has undergone several stages of varying self-definition and external interpretation, and is today characterized by a multidimensional situation in which women, called *tishumar*, represent a large part of the moving generation. In general, the term *ishumar* refers to a generation of border-crossers whose living conditions have created special strategies regarding mobility, and whose lifestyle goes far beyond traditional norms and values (Kohl 2009, 2010a, b, c). Before framing the lifestyles of contemporary Tuareg ex-nomads, I shall sketch the lives of three Nigerian Tuareg to illustrate their multifarious strategies.

ON THE MOVE: EXAMPLES OF CONTEMPORARY TUAREG EX-NOMADS

Talla⁵ is a tough Nigerian woman in her forties. One day in winter 2008 she stood in front of our door in Libya, quite exhausted from a three-day foot march from Djanet (in Algeria) to Ghat (in Libya). With nothing other than a small handbag over her shoulder, she had crossed the border illegally on a small path in the mountains between Algeria and Libya.



Figure 2: Talla (on the right) with kin in Libya (Photo: Ines Kohl, Ghat, Libya 2008).

⁴ Masc. sing. *ashamur*, fem. sing. *tashamurt*, masc. pl. *ishumar*, fem. pl. *tishumar*.

⁵ All names in the following description have been changed.

Talla has no passport or identity card. Years ago she abandoned her husband in Tamanrasset (in Algeria), left one child with him, and sent the other one back to her mother in Niger. From that time on she decided to stay with various relatives in Algeria and Niger and moved between these countries. In 2008 she moved to Libya due to the good reputation the country had among Tuareg. Al-Qaddafi was considered a supporter and mediator for the Tuareg, and Libya was called the “Europe of *ishumar*” (Kohl 2010c: 143–145, 2011) due to the comparatively good living conditions. After a while Talla had become quite well off, with a mobile phone, beautiful dresses, gold jewellery and several marriage proposals. Later she married a man from Mali and organized a huge wedding. A month later she came back to our house, announced the end of her marriage, left two enormous suitcases full of wedding presents behind, and moved to Tripoli. For months we heard nothing from her. One day we got news that she had married again, this time to a man from Niger. During the Libyan war the couple fled to Algeria, and shortly afterwards they went back to Niger. Recently (in the first half of 2013) Talla and her husband re-settled in Ubari, in Libya.



Figure 3: Alhousseini (Photo: Ines Kohl, Ghat, Libya 2008).

Alhousseini was born in Algeria, but in his early years his Nigerian father brought him to his family in Niger where he grew up in the Sahara. He has never been to school and spent his childhood herding goats. Later he decided to leave the Sahara. For a couple of months he stayed in Arlit, a mining village where the French company Areva is exploring for uranium. But finding a job without any qualifications was impossible, so he went to Algeria, and afterwards to Libya, and worked for a couple of months on the huge Libyan farms. In 2007 he moved back to Niger and joined the rebellion. Finally he served in the Libyan war on the side of Qaddafi – not because of ideological convictions, but for money. Alhousseini has a Nigerian passport and a Libyan identification card, but with another name and date of birth. Dur-

ing the era of al-Qaddafi, Tuareg could easily obtain documents which allowed them to stay and work in Libya (see Kohl 2009: 52ff.). Alhousseini has married and divorced several times. His children stay with their mothers, who have to take care of them. Before the Libyan war he was constantly in search of making a fast buck and moved irregularly and according to his own choice between Niger, Algeria and Libya. In the aftermath of the Libyan war he returned to Niger, as he was afraid of staying in Libya. Now (in the first half of 2013) he is stuck in Agadez looking for occasional jobs.



Figure 4: Rhissa (Photo: Ines Kohl, Mandara, Libya 2008).

Rhissa grew up in Libya. His mother is Nigerian, his father half Algerian, half Libyan. He went to school in South Libya, worked for a couple of years as a driver in the desert tourism industry, and finally bought a Toyota pick-up with his savings.⁶ When desert tourism broke down as a result of the insecure situation in the Sahara-Sahel region, the taking hostage of European tourists beginning in 2003, and the US-launched “war on terror” in the Sahara (see Keenan 2009), he turned to *afrod*, the border business (see Kohl 2009, 2013). He transported illegal passengers between Libya, Algeria and Niger, up to thirty people in one Toyota, driving in a convoy of several cars through the Sahara for three days. In the event that there were no passengers he smuggled fuel, macaroni, fruit juice and even potato seeds from Algeria to Niger. Rhissa has Libyan and Nigerian citizenship, an Algerian identification card, and owns a car registered in Algeria. Since he has two wives, one in Libya, and one in Niger, he is constantly moving between his two families. Since the Sahara crossings have become risky owing to the Libyan war, the increasing drug and weapons smuggling and the drift of Islamist terrorist groups from Mali (see Deycard 2012; Kohl forthcoming), Rhissa has lost his profitable income from small-scale trade and transporting passengers over the borders. He is still moving between his two families in Niger and Libya, but the circumstances of moving have totally changed.

These three examples of contemporary Tuareg ex-nomads point to several aspects of their mobile lifestyle. Different mobility patterns become visible which range from cyclical, irregular and situational to seasonal. The mobility patterns allow implications on morality and correspond to a vagabond way of life which usually ends in marriage. Some mobility strategies of the Tuareg apply to a border business, where strategies of smuggling (whether of goods or passengers) and small-scale trade become blurred.

⁶ The Toyota Land Cruiser is a symbol of a modern lifestyle. It generates wealth and has become the substitute for a camel herd. The analogy is expressed in the term *akh n mota*, meaning the milk of the car, referring to the money a car brings. The Toyota Land Cruiser is also called *alam n japonais*, the Japanese camel, or is given names like such as those usually accorded to camels (Scholze 2010: 188).

The mobile life of contemporary Tuareg is possible since the Tuareg are spread over several countries and therefore can use a support network of kin and friends. Additionally, the Tuareg use multiple identities in order to be able to support their mobile lives. Finally, their mobility strategies are highly dependent on the geopolitical situation in the Sahara and the Sahel.

BEYOND TRADITIONAL NORMS AND VALUES

The nomadic and sedentary population attributes a mostly negative connotation to *ishumar* and *tishumar* because their lifestyle has become partly removed from Muslim customs and traditional merits. For example, the modification of the traditional men's face veil (*tagelmust* or *eshesh*) has become a synonym for the *ishumar* lifestyle. Originally it was a sign of adulthood, a symbol of belonging to a cultural unit, a representation towards the outside world, and an expression of social norms. The *eshesh* can be understood as a "conception of social distance and degree of respect" (Keenan 1977: 131); it signalizes reserve and honour (Claudot-Hawad 1993: 36–43) and is an elementary gesture to express politeness. It is important that the veil covers the forehead, ears and mouth of an adult man. In the past it was worn even while eating and drinking. Today, this is done only by a few old men. *Ishumar* reject the traditional way of wearing the *tagelmust*. In all colours, combined with sunglasses, jeans, and leather jackets, casually worn around the shoulder, or boldly combined with rasta hairstyles, the *tagelmust* has become a fashion accessory of the new generation (Kohl 2007: 152, 2009: 114f.). In the *ishumar* context it is still partly worn as a matter of social etiquette and respect towards elders; in general, however, it has lost its symbolic meaning. The *tagelmust* is instead an expression of social attractiveness (Kohl 2009: 116). Men call the veil pretty and feel more attractive to women when veiled (Rasmussen 1991: 108).

Along with the breakdown of the Tuareg dress code in terms of modesty and decency, the *ishumar* lifestyle is characterized by a pattern of behaviour and attitudes strange or even embarrassing to the elder nomadic population. In their eyes *ishumar* are irresponsible people without honour (*iba n ashak*) or respect (*iba n tekarakit*), as the following quotation illustrates:

Ishumar, those are the people who are moving permanently (*tekle ghas*). If it occurs to them to go, they shoulder their bag and they are gone. And nobody knows where they go. *Ishumar* are of no use (*wurelen faida*), they don't have any work (*wurelen eshughl*), always live alone (*egawaran ghasnesen*), forget their parents and siblings, and they are always chasing after women (*eghan tyadoden wullen*). They are not included in the calculation of parents, marriage and their people; they scrounge through life, only sit around the whole day, drink tea and listen to tapes. The same applies to *tishumar* (women). They spend a few days in Tripoli, then travel to Ghat, and eventually you will find them in Sebha, where they are staying with friends or relatives. Their parents don't know anything about them, sometimes weddings between *ishumar* happen without their parents knowing and often without Muslim customary law (*tamerkest*). The number of their illegitimate children increases and they don't have any prospects for the future (cited in: Kohl 2009: 14f., 2010: 151).

This typical description of an *ashamur* or a *tashamurt* mostly changes with marriage. Following the buzz phrase "being married, having worth" (Kohl 2010c: 152), establishing a family corresponds to original concepts of norms and values. Marrying and having children are traditional values that turn *ishumar* into respectable, full members of society. With marriage they break out of the *ishumar* loop and re-enter a state that conforms to a "proper" world-view (ibid.).

VAGABONDS OR AN ELITE?⁷

Considering the life strategies, behaviour, norms and values of the *ishumar*, their lifestyle can be summarized by the concept of “vagrancy, the opposite of nomadism” (Claudot-Hawad 2006: 662). But can these people also be considered an elite of their society because of their transnational experiences? Yes. I argue that *ishumar* embody a new elite, which to a large extent shapes the contemporary Tuareg society and gives direction to new ideas and development.

Elites are normally a relatively small group within the societal hierarchy that claims power, prestige, or command over others (Abbink, Salverda 2013: 1; Schijf 2013: 29f.). They are dominant in some sectors of society on the basis of material or non-material characteristics, skills, and achievements (ibid.). They form groups whose cultural capital positions them above their fellow citizens and whose decisions crucially shape what happens in the wider society (Shore 2002: 4).

In traditional Tuareg society the tribal leaders (*amenukalen*, *ettebelen*, *imgharen*) and Muslim specialists (*ineslimen*) have formed the intellectual elite (Lecocq 2004: 92). The overarching term for a member of the former elite was *anefren*, “one who is chosen” (Claudot-Hawad 2000: 18). The criteria for the choice included blood (meaning descent), honour, prestige and status, but other qualities such as knowledge, courage, strength, beauty and charisma have been incorporated.

I suggest that the new elite embodied by *ishumar* today is better described by the word *anefreg*, “one who is able or capable” (Kohl 2010a: 458). This new elite is not chosen; rather their own ability empowers them to act as leaders of society. The *ishumar* are mostly autodidact intellectuals whose insights developed not through formal education, but through their experiences of transnational or international travel, smuggling, and employment in various sectors previously unknown to the Tuareg (cf. Lecocq 2004).

Baz Lecocq (ibid.) argues that *ishumar* can be perceived as an elite because first of all, they have seen themselves as such since the 1980s when they engaged in rebellions which would lead their people to independence or at least to increased decentralization and better life conditions. Secondly they can be seen as an intellectual elite because they put their thoughts on migration, mobility, modernity, politics, and social life into words: the poems and songs of the guitarists (groups and individuals such as Tinariwen, Bombino, Abdallah Oumbadougou, Terakaft, Tamikrest, Nabil Othmani, etc.), who have entered the world music scene (see Belalimat 2010). With their lyrics they transport their ideology into the nomadic camps.

Lecocq primarily refers to the rebel leaders, poets and guitarists as the new intellectual elite. I shall augment the group with “ordinary” *ishumar*, who have spread new ideas, knowledge and skills into their community simply due to their transnational life strategies. These achievements are often quite basic, but very useful to engage more actively in a globalized world, where pastoralism and nomadism are becoming ecologically fragile and economically unviable. *Ishumar* who have had contact with their surrounding neighbours, such as Arabs, Hausa, Tubu or Europeans, are much more open-minded with regard to political attitudes and economic strategies than their nomadic fellows living far away from inter-ethnic relations. Many *ishumar* from Niger have worked on huge farms in Libya and brought the idea of garden cultivation to the Aïr Mountains. Gardening meanwhile is a main pillar of the nomads in Northern Niger. It provides a strategy against poverty in times when pastoralism is very risky due to climatic changes. Gardening supplies the local population with a very balanced diet. Formerly, nomads have been nourished primarily with millet and milk. With the widespread idea of garden cultivation their menu has increased to include with all sorts of vegetables (such as carrots, potatoes, lettuce, cabbage, green beans, pumpkins, tomatoes, etc.) and fruits (such as oranges, pomegranates and grapes). The families can work together (the women usually take care of the livestock, while the men are engaged in cultivation) and young men in particular are no longer forced to migrate

⁷ I have elaborated parts of this passage elsewhere (Kohl 2010a).

in order to make a living, since they have work at home and additionally receive an income from the sale of their products.

Most *ishumar* have become familiar with the internet and improved modes of communication and information, and have realized their unequal political and economic situation. They have started to engage in civil society in order to struggle for political, economic, and social justice. Human rights activism and the foundation of local NGOs (such as the in Arlit-based NGO Aghirin man which is fighting for environmental protection against the French uranium mining company Areva) have arrived the Sahara.

KINSHIP TIES AND MULTIPLE IDENTITIES

The transnational mobility of the *ishumar* is backed to a large extent by kin and friends on all sides of the Saharan borders. Additionally, the use of multiple identities provides a basis for crossing the borders easily.

The Tuareg are a tribal society where belonging is based on kinship and blood relations. After colonial division and the African nation-building process, blood relationships were replaced by nationalist ideas and after that have been based on territorial concepts. Instead of blood, the soil, the land and the territory are used as the new binding factor (Lecocq 2004: 104). Since the territorial fragmentation the Tuareg now classify themselves as “Libyan Tuareg”, “Nigerian Tuareg”, or “*Kel* (people of) Mali”. Nationalism has thus had a strong impact on the Tuareg and nowadays belonging on a formal level is based less on tribal structures than on national constructs (Kohl 2007: 200).

Kinship is still a major element for defining belonging on an informal level, and is a basis for help, assistance and support. *Ishumar* can count on (even quite distant) kin and friends living on all sides of the borders. They provide lodging and food, and give any assistance required in the new environment. But ties between *ishumar* are often weak and loose. Their life circumstances have ripped the social fabric to pieces and loosened ancient ties of solidarity (Claudot-Hawad 2006: 666). On the other hand, *ishumar* have formed interethnic relationships which enable them to take part in many worlds without framing a community with fixed boundaries, as is typical for cosmopolitans (Caglar 2002: 180).

Friendship has become an important additional factor for *ishumar* (cf. Klute 2011). There is, however, one remarkable aspect. *Ishumar* mostly do not mix much across regional and national categories. Those from the Aïr mountains in Niger create and sustain networks of friends and feel a deep loyalty among each other, but do not extend their relations towards Tuareg from other regions (such as Azawad in Niger), or other countries (such as Mali; see Kohl 2010a).

In recent years national identities have become important. All Tuareg-inhabited countries have started to count their populations and equip them with identification cards and passports. *Ishumar* use this system and claim ID-cards in all of these countries, but often with different names and birth dates (cf. Scheele 2012: 97). Many *ishumar* operate with multiple citizenships and have multiple places of residence. This relates to their ability to communicate in many languages (Arabic, French, Hausa, and English) in addition to their native one (Tamasheq).

Other *ishumar* do not possess any papers at all and cross the borders surreptitiously. This stems on the one hand from the fact that for a nomadic society born into the desert without exact reference in terms of time and place, providing evidence still has little importance among nomads. Many *ishumar* are quite proud of their life strategies, as one of them expresses:

We *ishumar*, we are the only ones who still have freedom. We are permanently moving between Niger, Algeria, and Libya. Once you have come to know this life, you can't go back anymore. We are free! (Kohl 2007a: 140).

On the other hand, crossing the Saharan nation states legally is a major problem (cf. Brachet 2009: 166ff.). Visas are difficult to obtain,⁸ require money, and people are often strung along for weeks or months with the words “come back tomorrow”, until the applicant loses his patience and travels clandestinely.

Because of the overall insecurity in the Sahara and the Sahel, moving freely in those regions has become more difficult. As a result of the Libyan war (see *Politique Africaine* 125/2012), the political crisis in Mali (see Claudot-Hawad 2013; Galy 2013; Morgan 2012), and the rise of extremist Islamists involved in drug and weapon contraband smuggling (see Burbank 2012; Daniel 2012; Larcher 2012; Mohamedou 2011), the Tuareg’s mobility strategies have become disordered. The territorial borders have increased in control and fortification, and Tuareg moving in the borderlands are strongly suspected of being weapon and drug traffickers or allies of Islamist terrorists. Many of the young *ishumar* are afraid of moving as before, and so stay in Niger and have to find other solutions for escaping the unemployment, impoverishment, and lack of prospects. The unrestrained mobility of the *ishumar* described in this paper has most likely recently come to an end.

MARGINAL MOBILITIES?

In the last chapter I shall try to apply the concept of marginal mobilities⁹ to the example of the *ishumar*. According to Juntunen, Kalčić and Rogelja (forthcoming), marginal mobilities share five basic characteristics: (1) Their movement is constant, and occurs along loosely defined trajectories. (2) The mobility is not entirely voluntary nor is it forced. (3) The social world is marked by uprootedness and liminality. (4) Marginal mobilities lack a politicized public space. (5) The subjects are in a constant process of negotiation with the state bureaucracies that impose a sedentary norm on their lives.

Hawad (1991: 129) defines the mobility of the *ishumar* as a modified form of nomadism. This mobility does not have any regulated stages and cyclic consequences like that of pastoral nomads. Instead, it takes the form of zigzag patterns and follows primarily situational rules. The mobility of *ishumar* is disorganized, anarchic and becomes more and more disengaged from the original centres and traditions. Although there is little to nothing left of the pastorals’ original cyclic movements with their livestock, *ishumar* still embody a certain philosophy of being mobile (Claudot-Hawad 2006: 658). That is why their movements are neither purely voluntary, nor are they always forced by political and economic circumstances.

To summarize, the *ishumar*’s movements are irregular. They are partly cyclical, partly situational and sometimes seasonal. Some *ishumar* drift between their transnational families, some work as seasonal workers (before the Libyan war often in tourism), others try to find a living through casual employment on the other side of the border. And yet others use the borders to fulfil strategies of small-scale trade and smuggling.¹⁰

Their movements have three characteristic features in common: they are transnational, they are constant, and they follow very loosely defined trajectories. The first, transnational aspect is in part the consequence of the harsh economic and political situation in the Sahel-states of Mali and Niger. Neither country provides any support for impoverished nomads, and the living conditions in Algeria and especially in Libya during the Qaddafi era were much better.¹¹

8 In al-Qaddafi’s Libya for example it was almost impossible to enter the country legally, and Nigerians entering Algeria still need a visa.

9 Marginal mobilities is an analytical concept developed by Juntunen, Kalčić and Rogelja (2013).

10 The boundaries between small-scale trade and smuggling are fluid. They only differ in accordance to their legal status. See various articles in Bruns and Miggelbrink (2012).

11 One may also argue that the Tuareg are not moving trans-nationally, but trans-regionally. This is a perception Tuareg themselves often express. Although *ishumar* cross state borders, they still operate in their former tribal radius, which was only cut due to colonial borders. If, for example, an *ashamur* from Mali is heading to Libya

Secondly, *Ishumar* move constantly. Even most *ishumar* who have already settled down with families have not given up their continuing peripatetic movements. But it is a male business. Most women, once they have been married, give up their continuous movements and only occasionally travel back to their places of origin and visit their parents. Men, however, more often continue to pursue a mobile life in order to earn their living, even if they have been married and have settled down with their family in one of the countries. Thirdly, *ishumar* follow very loosely defined trajectories. Their trajectories are characterized by situational motives, personal choice, and individual desires and patterns.

James Clifford (1991) has introduced the term “travelling culture” to describe a mobile society for whom moving is not an exception in life, but a normal condition. For these societies one could say that “moving is the rule”. The *ishumar* correspond to this approach and illustrate that certain forms of contemporary mobility contrast substantially with conventional categories (such as migrants, refugees, displaced persons, exiles, or diaspora societies). I agree with Alessandra Giuffrida (2010: 23–40) that “the study of mobility through conceptually isolated categories (like pastoralists, exiles, refugees or labour migrants) has not been conducive to understanding mobility as an overarching system in all its variations”. We should rather recognize that “mobility is system, a subsystem, as well as a strategy” (ibid.: 23).

Another characteristic of marginal mobilities concerns uprootedness and liminality. Both terms represent the *ishumar*’s life, as I have tried to indicate by reference to their break with norms and values. Through their mobile life from early youth on (sometimes even beginning in childhood), *ishumar* experience a rupture with their original partly nomadic background. In their new environments (mostly Libya and Algeria) *ishumar* normally stay among each other.

Algerian and Libyan Tuareg strongly distance themselves from their fellow Tuareg from Niger and Mali. Their relationship is characterized by a mutually noticeable negative attitude, which emphasizes and overemphasizes the differences between the two groups, while at the same time neglecting existing similarities. The complex relationship between Libyan Tuareg, for example, and *ishumar* is a variation on the theme of “locals versus newcomers” and can be interpreted as follows: each group predominantly employs a strategy of “belittling avoidance” of the other. For the Libyan Tuareg this means above all distancing themselves from migrants, who in the present age of globalization are classified as “aliens to the nation state”, despite speaking the same language and having a similar culture. By contrast, from the *ishumar*’s point of view, the “belittling avoidance” is rather the inevitable result of the power relations that they have encountered. For them, the Libyan Tuareg are resident representatives of Libya. Coming from a weaker, asymmetrically structured starting point, they need to deal with Libya to secure supra-local opportunities for participation (Kohl 2007: 132f., Kohl 2010c: 146).

This is the reason why the *ishumar* lack a politicized public space. They live on the margins of their own society, and they are not included in the new one. They act in an intermediate space and muddle through life until, through marriage, they enter a proper, honourable life and re-enter their own society.

Since their formation, the Saharan and Sahelian nation states have imposed sedentary norms on nomads. The Tuareg (and not only the *ishumar*) are thus in a constant process of negotiation with the state bureaucracies. Mali (before the crisis) and Niger accepted the illegal border crossings of the Tuareg to a certain extent. Algeria and Libya are much more dependent on EU regulations which are committed to the control of their southern borders in order to prevent illegal migration to Europe.

CONCLUDING REMARKS

The harsh ecological, political, and economic situation in the Sahara and the Sahel challenges the nomadic population more than ever. In large parts of their region, nomadic pastoralist activities are no

via Algeria, he crosses two state borders, but still moves in the original territory of the Tuareg. He in fact is just changing tribal boundaries.

longer feasible for ecological reasons, but also because of global economic interests in uranium, oil and gas. Today the Tuareg deal actively with these supra-local influences and have developed strategies to overcome ecological, economic and, recently, political crises. The case of the *ishumar* presented here shows that mobility is a crucial factor in making a successful living in the Sahara and the Sahel. Their recent forms of mobility go beyond moving with livestock, and challenge national loyalties and politics in their trans-local, trans-regional, or trans-national nature.

The example of the *ishumar* confirms and supports the concept of marginal mobilities. It has become clear that certain modern ways of being mobile cannot be subsumed under the umbrella of conventional categories. *Ishumar* are moving constantly. They have no fixed trajectories, but range corresponding to their situational needs and demands and according to individual choice between Niger (or Mali), Algeria, and Libya. In doing so, they follow a life which comes near vagrancy. In this paper, however, I have tried to show that these people may also be seen as a certain elite of their society. The new elite have nothing to do with the former tribal and religious leaders, but have developed their ideas and reflections through experiences which are highly connected to transnational mobility. Being mobile is a strategy for making a living in insecure times, and corresponds to the fact that mobility is often not an exception in life, but may represent normality.

REFERENCES

- Abbink, Jon, Salverda, Tijo (2013). Introduction. An Anthropological Perspective on Elite Power and the Cultural Politics of Elites. *The Anthropology of Elites. Power, Culture and the Complexities of Distinction* (eds. Jon Abbink, Tijo Salverda). New York: Palgrave Macmillan, 1–28.
- Ag Aher, Elelli (1990). L'initiation d'un ashamar. *Touaregs. Exil et Résistance* (ed. Hélène Claudot-Hawad). Aix-en-Provence: R.E.M.M.M. 57, 141–152.
- Austen, Ralph A. (2010). *Trans-Saharan Africa in World History*. Oxford: University Press.
- Badi, Dida (2012). *Les Touaregs du Tassili n Ajjer*. Mémoire collective et *organization sociale*, Mémoires du Centre National de Recherches Préhistorique, Anthropologique et Historiques. Nouvelle série n°17. Algier: CNRPAH.
- Belalimat, Nadia (2010). The Ishumar Guitar: Emergence, Circulation and Evolution, from Diasporic Performances to the World Scene. *Tuareg Society within a Globalized World. Saharan Life in Transition* (eds. Anja Fischer, Ines Kohl). London, New York: I. B. Tauris, 155–170.
- Bourgeot, André (1995). *Les Sociétés Touarègues. Nomadisme, Identité, Résistance*. Paris: Karthala.
- Brachet, Julien (2009). *Migrations transsahariennes: vers un désert cosmopolite et morcelé (Niger)*. Bellecombe-en-Bauges: Editions du croquant.
- Burbank, Joelle (2010). *Trans-Saharan Trafficking. A Growing Source of Terrorist Financing*. Center for the Study of Threat Convergence: The Fund for Peace.
- Bruns, Bettina, Miggelbrink, Judith (2012). *Subverting Borders. Doing Research on Smuggling and Small-Scale Trade*. Wiesbaden: Verlag für Sozialwissenschaften.
- Caglar, Ayse (2002). Media Corporatism and Cosmopolitanism. *Conceiving Cosmopolitanism: Theory, Context, and Practice* (eds. Steven Vertovec, Robert Cohen). Oxford: Oxford University Press, 180–190.
- Claudot-Hawad, Hélène (1993). Visage voilé et expressivité. *Les Touaregs: Portrait en fragments* (ed. Hélène Claudot-Hawad). Aix-en-Provence: Edisud, 29–44.
- Claudot-Hawad, Hélène (2000). Elite, honneur et sacrifice. *Elites du monde nomade Touareg et Maure* (eds. Pierre Bonte, Hélène Claudot-Hawad). Aix-en-Provence: Edisud, 17–36.
- Claudot-Hawad, Hélène (2002a). "Voyager nomade". *Voyager d'un point du vu nomade* (ed. Hélène Claudot-Hawad). Paris: Méditerranée, 7–10.
- Claudot-Hawad, Hélène (2002b). Noces de vent. Epouser le vide ou l'art nomade de voyager. *Voyager d'un point du vu nomade* (ed. Hélène Claudot-Hawad). Paris: Méditerranée, 11–36.

- Claudot-Hawad, H el ene (2006). A Nomadic Fight against Immobility: The Tuareg in the Modern State. *Nomadic Societies in the Middle East and North Africa: Entering the 21st Century* (ed. Dawn Chatty). Leiden, Boston: Brill, 654–681.
- Claudot-Hawad, H el ene (2013). La “question touar egue”: quell enjeux? *La guerre au Mali. Comprendre la crise au Sahel et au Sahara: Enjeux et zones d’ombre* (ed. Michel Galy). Paris: La D ecouverte, 125–147.
- Clifford, James (1991). Traveling Cultures. *Cultural Studies* (eds. Lawrence Grossberg, Cary Nelson, Paula Treichler). London, New York: Routledge, 96–116.
- Daniel, Serge (2012). *AQMI, Al-Qaida au Maghreb Islamique. L’industrie de l’enl evement*. Fayard.
- Deycard, Fr ed eric (2012). *Uncertain Times: The Consequences of the Libyan Civil War on Niger*. Unpublished Background Paper. Geneva: Small Arms Survey.
- De Brujin, Mirjam, van Dijk, Rijk, Foeken, Dick (2001). *Mobile Africa. Changing Patterns of Movement in Africa and Beyond*. Leiden, Boston, Cologne: Brill.
- Galy, Michel (2013). *La guerre au Mali. Comprendre la crise au Sahel et au Sahara: Enjeux et zones d’ombre*. Paris: La D ecouverte.
- Giuffrida, Alessandra (2010). Tuareg Networks: An Integrated approach to Mobility and Stasis. *Tuareg Society within a Globalized World: Saharan Life in Transition* (eds. Anja Fischer, Ines Kohl). London, New York: I.B.Tauris, 23–40.
- Gr egoire, Emmanuel (1999). *Touaregs du Niger. Le destin d’un mythe*. Paris: Karthala.
- Hawad, Mahmoudan (1991). La Teshumara antidote de l’etat. *Touaregs. Exil et r esistance* (ed. H el ene Claudot-Hawad). Aix-en-Provence: R.E.M.M.M 57, 123–138.
- Juntunen, Marko, Kal ic,  spelja, Rogelja, Nata a (forthcoming). Mobility, Marginality and the Global Economic Recession. Western Nomads and Mobile Moroccan Men. *Nordic Journal of Migration Research*.
- Keenan, Jeremy (1977). *The Tuareg. People of the Ahaggar*. London: The Penguin Press.
- Keenan, Jeremy (2004). *The Lesser Gods of the Sahara*. London, Portland: Frank Cass.
- Keenan, Jeremy (2009). *The Dark Sahara. America’s War on Terror in Africa*. New York: Pluto Press.
- Klute, Georg (2011). From Friends to Enemies: Negotiating Nationalism, Tribal Identities, and Kinship in the Fratricidal War of the Malian Tuareg. *L’Ann ee du Maghreb 2011. Dossier Sahara en mouvement*. Paris: CNRS Editions, 163–176.
- Kohl, Ines (2007). *Tuareg in Libyen. Identit aten zwischen Grenzen*, Berlin: Reimer.
- Kohl, Ines (2009). *Beautiful Modern Nomads: Bordercrossing Tuareg between Niger, Algeria and Libya*, Berlin: Reimer.
- Kohl, Ines (2010a). Modern Nomads, Vagabonds, or Cosmopolitans? Reflections on Contemporary Tuareg Society. *Journal of Anthropological Research* 66/4, 449–462.
- Kohl, Ines (2010b). Saharan “Borderline”-Strategies: Tuareg Transnational Mobility. *Mobility, Transnationalism and Contemporary African Societies* (ed. Tilo Gr atz). Newcastle upon Tyne: Cambridge Scholars Publishing, 92–105.
- Kohl, Ines (2010c). Libya, the “Europe of Ishumar”: Between Losing and Reinventing Tradition. *Tuareg Society within a Globalized World: Saharan Life in Transition* (eds. Anja Fischer, Ines Kohl). London, New York: I.B.Tauris, 143–154.
- Kohl, Ines (2011). Gaddafis Instrumentalisierung der Tuareg. *Libyen, Hintergr unde, Analysen, Berichte* (ed. Fritz Edlinger). Wien: Promedia, 71–86.
- Kohl, Ines (forthcoming). Afrod, the Border Business of the Tuareg. New Conditions and Challenges. *Conditions nouveau. Politique Africaine*.
- Kohl, Ines, Fischer, Anja (2010). Tuareg Moving Global: An Introduction. *Tuareg Society within a Globalized World: Saharan Life in Transition* (eds. Anja Fischer, Ines Kohl). London, New York: I.B.Tauris, 1–8.
- Larcher, Wolfram (2012). *Organized crime and conflict in the Sahel-Sahara Region*, The Carnegie Papers, <http://carnegieendowment.org/2012/09/13/organized-crime-and-conflict-in-sahel-sahara-region/dtjm> (5 June 2013).

- Lecocq, Baz (2004). Unemployed Intellectuals in the Sahara: The Teshumara Nationalist Movement and the Revolutions in Tuareg Society. *IRSH 49 Supplement, Internationaal Instituut voor Sociale Geschieden*, 87–109.
- Lecocq, Baz (2010). Tuareg City Blues – Cultural Capital in a Global Cosmopole. *Tuareg Society within a Globalized World: Saharan Life in Transition* (eds. Anja Fischer, Ines Kohl). London, New York: I.B.Tauris, 41–60.
- Lecocq, Baz (2012). *Disputed Desert. Decolonisation, Competing Nationalism and Tuareg Rebellions in Northern Mali*. Leiden, Boston: Brill.
- Maddy-Wietzmann, Bruce (2012). *The Berber Identity Movement and the Challenge to North African States*. Austin: University of Texas Press.
- McDougall, James, Scheele, Judith (2012). *Saharan Frontiers. Space and Mobility in Northwest Africa*. Bloomington: Indiana University Press.
- Marfaing, Laurence, Wippel, Steffen (2004). *Les relations transsahariennes à l'époque contemporaine: Une espace en constant mutation*. Paris: Karthala.
- Mohamedou Ould, Mohamed (2011). *The Many Faces of Al Qaeda in the Islamic Maghreb*, GCSP Policy paper, No. 15. www.gcsp.ch/.../GCSP%20Policy%20Paper%2015%20-%20Deutsch.pdf (17. June 2013).
- Morgan, Andy (2012). The Causes of the Uprising in Northern Mali. The Tuareg Rebels' Recent Attacks Represent a Fourth Roll of the Kel Tamasheq Dice. *Think Africa Press*. <http://thinkafricapress.com/mali/causes-uprising-northern-mali-tuareg> (13. June 2013).
- Politique Africaine 125 (2012). *La Libye révolutionnaire*. Paris: Karthala.
- Rasmussen, Susan (1991). Veiled Self, Transparent Meanings: Tuareg Headdress as Social Expression. *Ethnology* 30, 101–117.
- Scheele, Judith (2012). *Smugglers and Saints of the Sahara: Regional Connectivity in the Twentieth Century*. University Press: Cambridge.
- Schijf, Huibert (2013). Researching Elites: Old and New Perspectives. *The Anthropology of Elites. Power, Culture and the Complexities of Distinction* (eds. Jon Abbink, Tijo Salverda). New York: Palgrave Macmillan, 29–44.
- Scholze, Marko (2010). Between the Worlds. Tuareg as Entrepreneurs in Tourism. *Tuareg Society within a Globalized World: Saharan Life in Transition* (eds. Anja Fischer, Ines Kohl). London, New York: I.B.Tauris, 175–194.
- Shore, Chris (2002). Introduction. Towards an Anthropology of Elites. *Elite Culture. Anthropological Perspectives* (eds. Chris Shore, Stephen Nugent). London, New York: Routledge, 1–21.

ROMA, GYPSY TRAVELLERS, GENS DU VOYAGE: PEOPLE WHO TRAVEL?

Alenka JANKO SPREIZER¹

COBISS 1.01

ABSTRACT

Roma, Gypsy Travellers, Gens du Voyage: People who Travel?

In this turbulent world, different people live highly mobile lives and some seem to be living on the move. On the other hand, there are people known as Gypsies, Travellers, Gens du Voyage or Roma, imagined as nomads, although their mobility has been highly controlled or restricted by repressive regimes, nation-states and local communities of Europe throughout history. Following the "mobility turn" or the "new mobilities paradigm" in social studies and based on ethnographic records of travelling Roma who visited Slovenia as "tourists", I will look at studies of mobilities of Roma. The intention of this paper is first to shed light on the juridical categories of nomad within a certain historical context. Second, within the new mobilities paradigm, and with reference to the immobile platforms that make mobility possible, I will look at the provision of Travellers' sites that paradoxically make some Travellers less mobile or even sedentarized.

KEY WORDS: Roma, Gypsy Travellers, Gens du Voyage, mobilities, marginality

IZVLEČEK

Romi, Cigani popotniki, ljudje potovanja: Ljudje, ki potujejo?

V tem turbulentnem svetu nekateri ljudje živijo potujoč način življenja, saj so tako rekoč v nenehnem gibanju. Na drugi strani ljudem, ki so znani kot Cigani, 'popotniki' (Travellers), 'ljudje potovanja' (Gens du voyage) in si jih zamišljamo kot nomade, v Evropi različni represivni režimi, nacionalne države in lokalne skupnosti omejujejo mobilnost. Ob upoštevanju »preobrata mobilnosti« ali »nove paradigme mobilnosti«, o katerih teče razprava v družbenih znanostih, in na temelju etnografskega zapisa o potujočih Romih, ki so obiskali Slovenijo kot »turisti«, avtorica predstavi problematiko mobilnosti Romov. Namen pričujočega članka je, prvič, osvetliti pravne kategorije pojma nomad v določenih zgodovinskih kontekstih, ter drugič, skladno s »paradigmo novih mobilnosti« pregledati študije o prostorih za kampiranje, ki so namenjeni 'popotnikom' (Travellers) in ki naj bi kot nemobilne platforme omogočali potujoč način življenja. Avtorica osvetljuje naslednji paradoks: medtem ko je dandanes tako rekoč ves svet v gibanju, mobilnost nekaterih Romov različne oblasti ovirajo ter jih želijo sedentarizirati.

KLJUČNE BESEDE: Romi, Cigani, popotniki, ljudje potovanja, mobilnosti, marginalnost

¹ PhD, MA in Social Anthropology, Senior Research Fellow, Assistant Professor; University of Primorska, Faculty of Humanities, Titov trg 5, SI-6000 Koper; alenka.janko.spreizer@fhs.upr.si.

INTRODUCTION

7 May 2004. After my lectures, I was driving in my blue Citroen van on the motorway from Koper to Ljubljana, thinking about my students who had offered me their representations of newly arrived Roma. After 1 May 2004, when Slovenia became a member of the European Union and when the borders seemed to be more permeable, people with 50 caravans, whom the media represented as “tourists”, “guests” and “a caravan of Roma”, came to Koper and then to other cities in Slovenia.

The students’ narrations described Gypsies who were parking at different locations: one group parked in the parking lot in front of a hypermarket, some people were temporarily camping on gravel parking areas near the town centre. In the next few days, the Roma went from door to door offering various services and items for sale. Their activities upset several people, who reported the Gypsy business to the local police.

Two days later, on Sunday, I met some long-haired men in bright well-tailored suits and women who visited the city’s antiques fair. In the afternoon, passing by the parking area near the west motorway ring, I noticed 8 cars with 8 caravans waiting in line as if they intended to leave. I asked them where they were going. They told me that the police had evicted them from the parking area and asked them to go to a camping area. They had been refused as guests in some camping areas around Ljubljana. They asked me to escort an older man to the police station, where he intended to ask for permission to stay for one day longer at that particular parking area. They were looking for a stopping place where they could stay for a while (field notes excerpt, 7–9 May 2004).

While over the last decade the issue of boundless worlds (Kirby 2009) and the fluidity of culture has been widely discussed as a new trend in anthropology, and mobilities proposed as the new paradigm (Sheller, Urry 2006), Roma and Gypsy Travellers have recently been again brought into the “mainstream” discussion of mobility (Shubin 2010; Shubin, Swanson 2010; Sigona, Zetter 2010).

The main part of this article will highlight the construction of the nomadic image of Roma as well as their (im)mobility through an overview of juridical categories. Within the historical description of juridical categories I will focus mainly on the French case. This choice is somewhat arbitrary: the first reason is that almost a decade ago I spent 9 months in France as a researcher at the EHESS in Paris, where I studied migration and movement of Roma, and the second is that France has a long tradition of concise scholarly analysis of space/place and nomadic Gypsies.

The image of the Gypsy¹ as a nomad “is the longest established of all definitions and representations of the group” (Theodosiou, Brazzabeni 2011: 157). Roma are also seen as a marginalized population in contemporary Europe, socially excluded due to structural disadvantages in European societies (Day, Papataxiarchis, Stewart 1999).

Even when Roma are not explicitly labelled as nomads, they are defined with a reference to movement. The more exotic definitions present Roma as idealized mythic seducers, “errant” artists closely connected with the forces of Nature (Reyniers 1995: 45), or rely on the diffusionist thesis that they are a people of Indian origin who “left” their country in the 10th century and are “distributed” all around the world (cf. Williams 1995). The second trend in definitions argues that Roma are seen as indigenous peoples at the “margins” of European societies, operating within a particular economic niche and providing

1 I will use several terms for groups of people who are known under several names, such as Roma, Sinti, Travellers, Gens du Voyage. While some definitions use the term Roma for a more politically correct denomination and as an umbrella term, others use the term Tsiganes or Gypsies. Within Romani studies, these groups are known in accordance with self-denominations as Sinti, Roma, Kalderash. In historical records, they are unclearly defined as Bohemians, Romanichals, or Gitans (Reyniers 1995: 45; Okely 1983). In the United Kingdom, the term Gypsy-Traveller includes English Romanichals, Welsh Kale, Scottish Travellers (Nawken) and Irish Travellers (Minceir), and New Travellers or New Age Travellers (Bancroft 2005: 5; 12). The European Commission uses “Roma” as an umbrella term that includes groups of people who share similar cultural characteristics and a history of segregation in European societies, such as the Roma (who mainly live in Central and Eastern Europe and the Balkans), Sinti, Travellers, Kalé etc. (Stewart 2010: 2).

several services and occasional labour while they live in “caravans” and “travel” to find work and are not dependent on wage labour² (Williams 1995: 7; Okely 1983: 49).

MOBILITY, NOMADISM AND PERIPATETICS

Roma migration from Eastern to Western Europe after the collapse of the communist regimes in 1989 led some scholars to reopen discussions of Roma migration. Within these discussions, the main intentions were to critically deconstruct the notion that Roma are an inherently nomadic people and that their westward migration is connected with their inherent essential nature (Matras 2001; Acton 2010).

Roma were also labelled as atypical nomads who do not have their own land and are merchants and moving campers, or travelling people who are different from the settled communities (Reyniers 1995: 45). Exploring nomadism within the ecological approach, anthropologists proposed a new paradigm of a “peripatetics’ niche”, which was defined as “the regular demand for specialized goods and/or services that more sedentary or pastoral groups cannot, or will not support on a permanent basis” (Berland, Salo 1986: 2). It was pointed out that peripatetics, as ubiquitous nomads, had been overlooked in the social sciences: peripatetics were defined as marginal, itinerant endogamous nomadic groups, with “flexibility and sensitivity to the elements comprising the social and ecocultural environments of those communities among which they maintain themselves”. Among others, Berland and Salo stressed that “movement may also be closely linked to a host of internal as well as to external social and cultural factors” and that the “relative levels of mobility and/or sedentarization are not viewed as opposites” (ibid: 3).

The sociologist Thomas Acton challenges the culturalists’ conception, which postulated Gypsy nomadism as a cultural feature and/or ethnic, i.e. “racialized” trait (Acton 2010: 8). Within the theory of economic and social development, he defined nomadism as “the recurrent exploitation of spatially and temporally discontinuous economic opportunities” (ibid: 6) – if one place does not offer continuous opportunities for productive labour, then movement is required. Acton defines nomadism as an economic phenomenon which gives rise to culture, but is not culturally inherent. For him, only some Gypsies, who live in mixed urban rural societies where they may provide their services and certain skills, practise commercial nomadism, which is different from the “traditional nomadism” of hunter-gatherers and pastoral nomads (ibid: 7). Thus nomadism is a particular form of exploitation of resources available in a particular territory and is based on the circulation of individuals within social entities which organize access to this exploitation.

Reyniers (1995) listed the traditional services provided by Gypsies and defined their circulation as “peripatetic nomadism”: it is an exchange game of work with a sedentary population (gadje). The work of peripatetic nomads is independent, it may be specialized (such as a circus), polyvalent (i.e. they provide several services) and seasonal. Gypsies’ economic exchange with non-Gypsies demands displacements or a particular pattern of travel. Based on the concept of the “peripatetic niche”, the terms “peripatetic community” and “peripatetic strategy” were also proposed. Piasere (1986) used the term “peripatetic phenomenology” and later the term territorial behaviour (Piasere 1992; Casimir, Rao 1992).

Anthropologists conceptualized travelling patterns (Okely 1983) with highly variable contours, thus not conceiving them as rigid typologies but emphasizing their flexibility (Reynier 1995). As a central theme in recent social science, mobility was recognized as a “resource to which not everyone has

² In addition to Roma and Gypsy Travellers, some scholars also include other European travelling populations within this mosaic of autochthonous groups, such as Tattares in Sweden, the Yeniches of Belgium and France, Wonwagebewoners in the Netherlands and Landfahrer in Germany (Okely 1983: 10).

an equal relationship" (Skegs, in Shubin, Swanson 2010: 919; cf. Rogelja 2012).³ It was pointed out that mobility "transcends disciplinary boundaries; it encourages a rethinking of the politics of travel and metaphors for movement" (Skegs, in Shubin, Swanson 2010: 919). Below, I intend to show how nomadism has been regulated through legislation and how mobility metaphors reveal the domination of the sedentary state and the marginalization of the itinerant group.

MOBILITY CONTROL: A LESSON FROM HISTORY

Historically, there were differences between the regimes of Western and Eastern Europe with respect to their repressive legislations regarding Roma. In Europe, the Habsburg Emperors, as well as the sovereigns of Prussia and Spain, implemented assimilative strategies and developed a repressive system of forced sedentarization (Asseo 1995; Fraser 1992; Piasere 1986). In the West, discriminated and ignored as "social outcasts" (Bancroft 2005: 12), Gypsies were "more often the subject of legislation or populist action which was exclusionary by purpose" (ibid.).

The legislation of mobility was the result of the intention to control the mobile population (Asseo 1995; Fraser 1992; Okely 1983; Liégeois 1980); networks of official sites were located in the United Kingdom, France and other countries in which some sites were state-owned and, consequently, dependency on welfare higher, while the intention of this policy was to end nomadism and enforce sedentarization (Okely 1983; Bancroft 2005; Drakakis-Smith 2007; Shubin 2010). As an ascribed essential quality, mobility became a central argument for political regulation and intervention in everyday life and movement.

The French Law of 1912: nomads as a juridical category

In France, there was no law against nomads from 1789 to 1912. In describing "vagabonds of ethnic character who live in our territory as in a confiscated country, who do not want to know the rules of hygiene or the civil rules" (Aubin 2001: 27), Senator Flandrin's explanations reflect the xenophobic climate of the time. He stressed the fact that in the miserable wagon there were always numerous tribes [...] and that they enjoyed all privileges in the hosting society.

The Law of 1912 was conceived for the purposes of surveillance and repression of "vagabondage in wagons" (Delclitte 1995: 23–24). As a result of this law, nomads without permanent residence became a juridical category. While it was quite easy to overlook the mobility of people with travelling vocations and fairground folk, the authorities found it more difficult to control the mobility of nomads (i.e. Gypsies). People in wagons were strictly regarded as dangerous parasites in the world of travellers and were collectively criminalized (ibid.). If fairground folk who needed to obtain an identity booklet were perceived as suspects due to their itinerancy, then nomads were perceived as groups of criminals who need to be exposed to identification and control (ibid: 29).

Nomads were required to carry *The Anthropometrical Booklet for Nomads*. This booklet had to include records of their anthropometric features and every movement/displacement; their vehicles had to have registration plates for control. Their freedom of movement was restricted in the name of the state and for the sake of public law and order. The Law of 16 July 1912 introduced constant surveillance: people who were constantly on the move were perceived as dangerous and a greater threat to the public order than other people.

The Law of 1912 socially and juridically excluded nomads from French society. The main expli-

³ Nataša Rogelja (2012) showed that although the economic practices of liveaboards in the Mediterranean may be seen as precarious, the possibilities for the mobility of Mediterranean liveaboards might be understood as somehow privileged, since many of them have European passports and are thought of as sailors.

tion is grounded in the social order: owing to their mobility and because they did not have a permanent residence (domicile fixe), “people of travel” could not be integrated into the national community. During the Second World War, from the Decree of 6 April 1940 until the liberation, 3000 nomads were detained in French internment camps (Bidet 2010; Aubin 2001). The Law of 1912 remained in force until 1969.

The French Law of 3 January 1969

French law is based on a republican conception of citizenship and ignores the specifics of cultural and ethnic minorities (Aubin 2001: 31). According to French law, it was possible for mayors and the police to allow or forbid nomads from stopping within a community’s territory. Travel became more and more difficult, due to the expulsion of some Gypsy families, parking prohibitions, and public authorities demanding welcome/reception sites for Travellers. The Decree of 20 February 1968 designated “terrains de passage” for nomads, allowing the regulation of nomadic flows, and “terrains de séjour” for an unlimited period that would lead to a sedentary way of life. Stopping in other locations was prohibited in communities that organized authorized sites⁴ (Reynier, Williams 2001: 13). The state did not revalorize nomadism: the policy was directed towards sedentarization without force, since there were new restrictions imposed on the Gypsies (ibid.). The main contribution of the Law of 1969 was striving for the elimination of discriminative obstacles in the Law of 1912, which hindered the integration of nomads. The legislature established a more liberal regime for nomadic circulation, control was less severe and the anthropometric booklet was discontinued (Aubin 1996: 18; 2001: 31).⁵

Aubin pointed out an ambiguity, since the Law was striving for the sedentarization of nomads and used different terminology for Gypsies: instead of being conceptualized as nomads, they were conceptualized as “persons who circulate in France and do not have a domicile or permanent residence”. This law also included all categories of non-sedentary populations (Aubin 1996: 19) who were French citizens.

The Law of 1969 introduced the notion of a community of “rattachement”: an administrative unit which partially forms a domicile for those who do not have one and where nomads may arrange their administrative affairs. In the background of these communities’ provisions was the intention to “normalize” the way of life of *Gens du voyage*. Persons who submitted a circulation document to the authorities had to choose one of these communities, but the final decision was made by a mayor and a prefect. There was also one additional condition, namely that no more than 3% of population of any given community could be without a permanent residence (cf. Reynier, Williams 2001: 13; Aubin 1996, 2001).

The Law of 3 January 1969 created “new circulation documents”. At first this act seemed to be an enactment of freedom of movement. Yet through the lens of public order, nomads were seen as a priori suspicious people, a dangerous class, and their activities had to be subject to regulation for the sake of public order (cf. Reynier, Williams 2001: 13). Thus the freedom of movement was only apparent, and later, with the Law of 2 February 1981 on Safety and Freedom, the mobile population became further marginalized and even more exposed to identity checks.

4 These authorized sites were limited to 60 caravans, and in future years the number became more and more limited. The sites needed to be close to a settlement, nearby hospitals and schools, and markets. They also needed to have permanent staff, such as socio-educational workers, gardeners etc.

5 The main argument of this law was based on archaic ideas that nomadic persons who move permanently are dangerous. This interpretation is possible on the basis of Article 5, which states that the absence of a circulation document constitutes a violation of the law punishable by imprisonment for 3 to 12 months (Aubin 1996: 20).

The Law of 31 May 1990

Some scholars have pointed to the other side of the problem – i.e. that freedom of movement also gives rise to the freedom to stop (Aubin 1996) – claiming that over the years, Gypsies' stopping and parking grew more and more regulated and hindered due to urbanization. The Law of 31 May 1990 officially aimed at integrating *Gens du voyage*. However, the issue of Travellers was not subject to this law, but was addressed later on, in the three paragraphs of Article 28.

The first paragraph laid down a departmental scheme specifying the conditions for the specific reception of Travellers, transition sites and residential/permanent sites for living, and stipulating that all sites must provide access to schooling and economic activities. Among other problems, there were difficulties in articulation between the scheme for the reception of *Gens du voyage* and the departmental scheme for disadvantaged people. The second paragraph stated that every community with more than 5000 inhabitants should provide *Gens du voyage* with the conditions for transit and living in its territory, reserving a site with equipment and facilities.

Communities were supposed to find locations where people would not be excluded: sites were to accept people and satisfy the needs of Travellers. According to Aubin, it was not possible to reject the legal obligation to provide an equipped site for the reception of *Gens du voyage*. It was a subsequent obligation for communities to reserve sites for *Gens du voyage* within their urban planning (Aubin 2001: 34). The last paragraph stated that if the reception site defined in the 1st and 2nd paragraphs was provided, then the mayor could prohibit the stopping of *Gens du voyage* in other parts of the community's territory. The main problem was that councillors enforced the 3rd paragraph without providing the required stopping place for the reception of *Gens du voyage*, when they were fighting against illegal stopping.

The Besson Law of 2000

The new Besson Law relates to the welcoming/reception of people. It was the first republic-level law exclusively dedicated to nomads (Aubin 2001: 40). The law defined the notion of a habitat adapted to the needs of Travellers. This law was also made to control the mobility of Gypsies and to solve the problem of caravan parking (Bidet 2010: 23). It created new administrative categories: *Gens du voyage* and *habitat*, meaning traditional dwelling in a mobile residence, and imposed on municipalities the obligation to welcome "people who travel" in welcoming/stopping places (Bidet 2010: 23; Aubin 2001).

According to their needs, every community with more than 5000 habitants was obliged to provide a departmental scheme, with permanent and temporary welcoming places. Temporary places were intended for traditional or occasional gathering under certain conditions and for the seasonal work of Travellers. These sites were to be authorized in accordance with urban codes. The law foresaw a consultative commission for the departmental scheme, with a mediator to make an evaluation of the implementation of the scheme. The representative of the state coordinated the activities and in case of a delayed provision of the scheme, the state could intervene or transfer the responsibilities for the management of the departmental scheme to intercommunity cooperation and, finally, the state could provide sites and organize the management of work. The state was obliged to provide funds for the sites. This law also changed some articles of social security legislation and urbanism legislation.

The law prohibited stopping outside of welcoming sites and regulated the conditions under which caravans could be forcibly evacuated. It was possible to install a caravan on private land, but only under a certain conditions and with authorization. Again, and with a juridical euphemism, mobility control measures targeted Gypsies, through a continuous although implicit reference to nomadism. The second interpretation of this law offered an explanation that this was also an attempt to solve technical problems, such as parking caravans, at the local level and also at the central level (Bidet 2010).

IN PLACE OF A CONCLUSION

As in France, legislation in the United Kingdom and in Italy was discriminatory towards Gypsies. Recent studies on space and movement have revealed that specific practices of governance and spatial ordering have led to the marginalization of itinerant Roma/Gypsies (Bancroft 2005; Shubin 2010; Sigona 2010; Willers, Ryder, Johnson 2010). There were fewer and fewer legal places to stay; encampments became strictly regulated by legislation, and possibilities for mobility were limited. The legislation includes several imagined features of mobility and travel which may contribute to the marginalization and social exclusion of Roma. Travellers were conceptualized as people who are constantly on the move or, in the case of Scotland, as a “rotating population” with no intention of being based or settled in their “home sites” (Shubin, Swanson 2010: 924). The mobility of Gypsies was restricted by the institutional infrastructure and legislation: they were allowed to camp only in authorized camps which were regulated by law. The legislation forbade encampments on the side of the road and on unused land where they traditionally had their unauthorized encampments.⁶

Bancroft explained the regulation of Gypsy Traveller mobility within the framework of the project of modernity. This project has developed a particular form of spatial regulation and control; institutional processes which govern contemporary societies make some places into ordered zones and leave others in their dark zones: the countryside as well as urban places have become subject to restrictive control and strict police surveillance, and this fact has severely affected the life of Gypsy Travellers (Bancroft 2005: 23).

Roma were represented to the various authorities as nomads, and nomadism was a justification for legal intervention. The authorities have introduced a legal basis for restricting the mobility of Roma communities which were identified as mobile Gypsies. In this paper, I have shown that they are constructed from the sedentary perspective as mobile in opposition to the fixity in the legislation (Shubin, Swanson 2010: 924–927). Imagined as nomads, they were forcibly made immobile through legislation and power, and consequently they are often pushed outside the law and onto the margins of society.

When Roma came to Slovenia in May 2004, their mobility was already policed. As foreign Roma they were not accepted and treated in accordance with the Slovenian ethnic community legislation, which gives a special legal status and rights to “indigenous” Roma (cf. Šumi, Janko 2011; Janko Spreizer 2011/12). They were considered ordinary tourists whose presence has to be reported to the police within 24 hours, in accordance with the law. Their presence in the country has to be registered at the address of a tourism facility or at the reception address.

When I visited the police station with the elderly man and explained that Roma were not able to find a proper parking place for their caravans, I was told by the policemen that they were well informed about Roma travelling routes around Koper, Kranj and Ljubljana. Mobility was under control, since the policemen had already visited and intended to evict a group of 20 people from the parking area, where they could not stay for more than a few days. It seemed that there were no camping areas as “institutionalized moorings that configure and enable mobilities” (Sheller, Uri 2006: 3, cf. Hannam, Sheller, Urry 2006). Available for the travelling Roma, who were already labelled as illegal and problematic.

The Roma had already learned that stopping and parking was difficult and that they were allowed to stay for a day or two without reporting their presence to the police: the elderly man explained to the

6 Rogelja’s observation is highly relevant here: “The recent events in France, where the Sarkozy government introduced a new crime bill (in 2010) in order to raid the Roma camps, connected the individualized actions of the younger French generation who moved sporadically to rural areas and built yurts in search of alternative or cheaper lifestyles with ‘traditional’ peripatetic groups. As the proposed crime bill includes a clause that gives local officials more power to break up ‘illegal installations that threaten public health, security or tranquillity’ (<http://www.treehugger.com/sustainable-product-design/yurts-cause-controversy-in-france.html>, 19 Feb. 2013), many yurt dwellers (called modern nomads on internet sites) (ibid.) were afraid that this legislation would be used against them” (Rogelja 2013).

policeman in German that they had arrived early that morning. When they were evicted by the police from the parking area and instructed to go to a camping area for tourists, they spent the afternoon searching for camping areas. At my insistence, the policeman on duty checked some camping sites around Ljubljana. I was told that the receptionists at several camps had rejected the Roma as guests, as they had been informed about the visit of a group of Roma from Italy and France. For the police it was "normal" that the presence of Roma might disturb some other guests and such a treatment from the receptionists was not perceived as racist or discriminatory behaviour.

There was no stopping place that would allow the travelling Roma to stop. Paradoxically, they were trapped in constant displacements and movement: since they were already known as nomadic Roma, they were not allowed to stay for a while at institutionalized places for travelling tourists. Roma movement is then even enforced by denying them possibility to stop or stay at designated stopping places for tourists for more than a few days, thus reinforcing their marginality.

Acknowledgments

I would like to thank the editors of this thematic issue, Nataša Rogelja, Špela Kalčič and Marko Juntunen, who invited me to be a part of this challenging Marginal Mobilities project. I also thank the two anonymous reviewers for their comments.

REFERENCES

- Acton, Thomas (2010). Theorising Mobility: Migration, Nomadism and the Social Reconstruction of Ethnicity. *Romani Mobilities in Europe: A Multidisciplinary Perspective*. Conference proceedings (eds. Nando Sigona, Roger Zetter). Oxford: Oxford University, Refugee Studies Centre, 5–11.
- Asseo, Henriette (1995). Des "Égyptiens" aux Rom, histoire et mythes. *Hommes et migrations* 1188–1189 juin-juillet, 15–22.
- Aubin, Emmanuel (1996). 1912–1969 La liberté d'aller et venir: l'idéologie sécuritaire. *Études Tsiganes*, nouvelle série 7, 13–36.
- Aubin, Emmanuel (2001). L'évolution du droit français applicable aux Tsiganes: les quatre logiques du législateur républicain. *Études Tsiganes*, nouvelle série 15, 26–56.
- Bancroft, Angus (2005). *Roma and Gypsy-Travellers: Modernity, Race, Space, and Exclusion*. Hants, Burlington: Ashgate Publishing Limited.
- Berland, Joseph C., Salo, Matt (1986). Peripatetic Communities: An Introduction. *Peripatetic Peoples. Nomadic Peoples* 21/22, 1–6.
- Bidet, Marie (2010). Will French Gypsies always stay nomadic and out of the law-making process? *Romani Mobilities in Europe: A Multidisciplinary Perspective*. Conference proceedings (eds. Nando Sigona, Roger Zetter). Oxford: Oxford University, Refugee Studies Centre, 20–27.
- Casimir, Michael J. (1992). The Dimensions of Territoriality: An Introduction. *Mobility and Territoriality: Social and Spatial Boundaries among Foragers, Fishers, Pastoralists and Peripatetics* (eds. Michael J. Casimir, Aparna Rao). New York, Oxford: Berg.
- Day, Sophie, Papataxiarchis, Evthymios, Stewart Michael (eds.) (1999). *Lilies of the Field. Marginal People who Live for the Moment*. Colorado, Oxford: Westview Press.
- Delclitte, Christophe (1995). La catégorie juridique "nomade" dans la loi de 1912. *Hommes et migrations* 1188–1189, 23–30.
- Drakakis-Smith, Angela (2007). Nomadism a Moving Myth? Policies of Exclusion and the Gypsy/Traveller Response. *Mobilities* 2/3, 463–487.

- Fraser, Angus (1992). *The Gypsies: The Peoples of Europe*. Oxford: Blackwell.
- Hannam, Kevin, Sheller, Mimi, Urry, John (2006). Editorial: Mobilities, Immobilities and Moorings. *Mobilities* 1/1, 1–22.
- Janko Spreizer, Alenka (2011/12). Emotional Geographies of Exclusion in a Selected Roma Settlement. *Etudes Tsiganes*, nouvelle série 44–55, 174–189.
- Kirby, Peter Wynn (2009). Lost in 'Space': An Anthropological Approach to Movement. *Boundless Worlds: An Anthropological Approach to Movement* (ed. Peter Wynn Kirby). Oxford and New York: Berghahn Books, 1–27.
- Liégeois, Jean Pierre (1980). Le discours de l'ordre: pouvoir publics et minorités culturelles. *Esprit* mai, 17–44.
- Matras, Yaron (2001). Romani Migrations in the Post-Communist Era: Their Historical and Political Significance. *Cambridge Review of International Affairs* 12/2, 32–50.
- Okely, Judith (1983). *The Traveller-Gypsies*. Cambridge: Cambridge University Press.
- Piasere, Leonardo (1986). Les Slovensko Roma entre sédentarité et nomadisme. *Peripatetic Peoples. Nomadic Peoples* 21/22, 37–50.
- Piasere, Leonardo (1992). Roma and Romá in North-East Italy: Two Types of Territorial Behaviour in the Same Larger Territory. *Mobility and Territoriality: Social and Spatial Boundaries among Foragers, Fishers, Pastoralists and Peripatetics* (eds. Michael J. Casimir, Aparna Rao). New York, Oxford: Berg.
- Reyniers, Alain (1995). Migration, mouvement et identité. *Hommes et migrations* 1188–1189, juin-juillet, 45–51.
- Reyniers, Alain, Williams, Patrick (2001). Permanence tsigane et politique de sédentarisation dans la France de l'après-guerre. *Études Tsiganes* nouvelle série 15, 10–25.
- Rogelja, Nataša (2012). Liveaboards in the Mediterranean: Luxury or Marginality? – Ethnographic Reflections on Maritime Lifestyle Migrations. *Dve domovini/Two homelands* 36, 119–130.
- Rogelja, Nataša (2013). Contemporary Peripatetic Nomadism: Mobility, Marginality and Inventiveness. *Dve domovini/Two homelands* 38.
- Sheller, Mimi, Urry, John (2006). The New Mobilities Paradigm. *Environment and Planning* 38, 207–226.
- Shubin, Sergei (2010). 'Where Can a Gypsy Stop?' Rethinking Mobility in Scotland. *Antipode* 43/ 2, 494–524.
- Shubin, Sergei, Swanson, Kate (2010). 'I'm an Imaginary Figure': Unravelling the Mobility and Marginalisation of Scottish Gypsy Travellers. *Geoforum* 41, 919–929.
- Sigona, Nando, Zetter, Roger (2010). Welcome and Introduction. *Romani Mobilities in Europe: A Multi-disciplinary Perspective*. Conference Proceedings (eds. Nando Sigona, Roger Zetter). Oxford: Oxford University, Refugee Studies Centre, 4.
- Stewart, Michael (2010). Introduction. Challenges for Scholarship in the Field of Romani Studies (eds. Michael Stewart, Márton Rövid). *Multi-disciplinary approaches to Romani Studies*. Budapest: CEU Press Budapest, 1–9.
- Šumi, Irena, Janko Spreizer Alenka (2011). That which Soils the Nation's Body: Discriminatory Discourse of Slovenian Academics on the Romany, Foreigners and Women. *Anthropological Notebooks* 17/3, 101–121.
- Theodosiou, Aspasia, Brazzabeni, Micol (2011). Emotion and Place: a Gypsy/Roma Account. *Etudes Tsiganes. Emotions et le lieu de vie. Emotions and place*, nouvelle série 44–45, 174–190.
- Willers, Marc, Ryder, Andrew, Johnson, Chris (2010). Facilitating the Gypsy and Traveller Way of Life in England and Wales Through the Courts. *Romani Mobilities in Europe: A Multidisciplinary Perspective*. Conference proceedings (eds. Nando Sigona, Roger Zetter). Oxford: Oxford University, Refugee Studies Centre, 237–250.
- Williams, Patrick (1995). Tsiganes parmi nous. *Hommes et migrations* 1188–1189, juin-juillet, 6–11.

R A Z P R A V E I N Ā L A N K I

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

OBRAVNAVA STARANJA V MIGRACIJSKIH ŠTUDIJAH IN SOCIALNI GERONTOLOGIJI

Sanja CUKUT KRILIĆ¹

COBISS 1.02

IZVLEČEK

Obravnavanje staranja v migracijskih študijah in socialni gerontologiji

Raziskovalci in prebivalstveni strokovnjaki staranje prebivalstva in mednarodne migracije razumejo kot temeljne procese, ki v Evropi v zadnjih desetletjih vplivajo na sestavo prebivalstva. Čeprav se pričakuje, da se bo število starejših migrantov in migrantk v prihodnosti še povečevalo, je bila medsebojna povezanost staranja in migracij do nedavnega le redko predmet raziskovalnega zanimanja. Prispevek se osredotoča zlasti na dve temeljni skupini starejših migrantov in migrantk: starejše osebe, ki migrirajo, in osebe, ki so se postarale v državah, v katere so se priselile. Predstavi tudi glavne izzive za oblikovanje in izvajanje migracijskih in socialnih politik v zvezi s starejšimi migranti in migrantkami in opozori na nevarnost njihovega poenotenja.

KLJUČNE BESEDE: staranje, migracije, starejše osebe, migracije upokojencev, povratne migracije

ABSTRACT

The Study of Ageing in Migration Studies and Social Gerontology

Ageing of the population and international migration are perceived by researchers and population experts as crucial to the changes in population composition that have occurred in Europe in the last few decades. Although it is expected that the number of older migrants will continue to rise in the future, until recently, the interactions between ageing and migration have rarely been a focus of research. The article focuses on two main groups of older migrants: older people who migrate and migrants, who have aged in the country they have immigrated into. It presents the main challenges pertaining to the formation and implementation of migration and social policy targeting older migrants and argues against their essentialisation.

KEY WORDS: ageing, migration, older people, retirement migration, return migration

UVOD

Staranje prebivalstva in migracije so po presoji nekaterih raziskovalcev v zadnjih desetletjih v Evropi najpomembnejši procesi, ki so povzročili spremembe v sestavi prebivalstva in pomembno vplivali na oblikovanje družbeno relevantnih tem, na primer upravljanja makroekonomije in skupnostnih oziroma medkulturnih odnosov (Warnes idr. 2004: 308). Hkrati jih umeščamo med temeljne politične priorite-

¹ Dr. socioloških znanosti, znanstvena sodelavka; Družbenomedicinski inštitut ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; sanja.cukut@zrc-sazu.si.

te na ravni Evropske unije. Staranje prebivalstva je v javnosti in na politični ravni sprožilo celo pozive k spremembam obstoječih sistemov pokojninskega zavarovanja. Trend naraščanja števila in pomena mednarodnih migracij pa je v javnosti držav, ki sprejemajo mednarodne migrante in migrantke, še povečal strahove o potencialnih stroških za njihovo socialno in pokojninsko varstvo (prim. Dwyer, Papadimitriou 2006: 1301). Širše gledano gre, kot poudarjata Mojca Vah in Marina Lukšič-Hacin (2008: 8), za zlasti politično motivirane debate o vplivu priseljevanja na zagotavljanje blaginje v dobi globalizacije (prim. Predojević-Despić 2011). Slednje postavlja migracije tako z vidika javnih politik kot refleksij v mnenjih javnosti v središče potencialno konfliktnih tematik (Zavratnik 2011: 67), v katerih je eno osrednjih vprašanj distribucija resursov med prebivalci.¹

Staranje prebivalstva je zlasti posledica dolgoročnega zniževanja rodnosti v večini evropskih držav, Severni Ameriki in Kanadi, predvsem od začetka sedemdesetih let prejšnjega stoletja. Posledici takšnega rodnostnega trenda sta predvsem zmanjševanje števila ekonomsko aktivnih posameznikov in posameznic in naraščanje bremena zdravstvenega in pokojninskega zavarovanja. In prav imigracijski ukrepi se kažejo, kot je zapisano v *Zeleni knjigi* (Green Paper 2012), kot eden od bolj verjetnih scenarijev oziroma strategij ukrepanja proti nastalemu demografskemu stanju.²

Zaradi opisanih procesov, ki smo jim v večji meri priča v zadnjih desetletjih, so staranje prebivalstva kot tudi mednarodne migracije že dolgo predmet proučevanja številnih raziskovalcev. Vendar Anthony Warnes in sodelavci (2004: 311) poudarjajo, da so raziskovalci le redko proučevali povezave med obema sociodemografskima procesoma. Osnovni motiv za proučevanje te povezave je dejstvo, da se bo število starejših migrantov in migrantk³ zaradi vedno večjega pomena mednarodnih migracij in hkrati staranja prebivalstva v prihodnosti še povečevalo (prim. Warnes idr. 2004: 308). V tovrstnih študijah se prepletata dve akademsko in aplikativno uveljavljeni polji: migracijske študije in socialna gerontologija, katerih spoznanja in pristopi so tudi podlaga za pričujoče besedilo.⁴ Sprva obravnavamo temeljne dejavnike, ki so vplivali na porast števila starejših migrantov in migrantk v družbah priseljevanja. Nadalje analiziramo vzroke za spregled te skupine prebivalstva v teoretičnih in empiričnih študijah migracij. Zlasti je poudarjena predpostavka o začasnosti njihovega bivanja. Kljub raznolikosti starejših migrantov in migrantk in posledično nezmožnosti oblikovanja enotne tipologije te skupine prebivalstva, predstavljamo nekatere temeljne skupine starejših migrantov in migrantk, kot so jih analizirali predvsem raziskovalci v Evropi, Avstraliji in ZDA. Obravnavamo tako osebe, ki so se postarale v državi, v katero so se preselile, kot

1 Simona Zavratnik (2011: 67) identificira tri glavne ravni torišč sporov, ki jih prinašajo migracije tako v javne politike kot v mnenja javnosti: 1. raven državljanstva, kjer so prisotna različna gledanja pa tudi spori glede priznavanja državljanskih pravic imigrantov; 2. raven kulture, kjer so v središču (ne)strinjanj politike multikulturalizma, vključenost/izključenost tujcev in kulturne diference; 3. ter raven funkcioniranja države blaginje ter distribucije socialnih transferjev med prebivalci.

2 Duška Knežević Hočevar (2011: 9) zapiše, da sta »v zadnjem desetletju tako na akademskem kot tudi političnem področju v središču presoje dva verjetna scenarija reševanja posledic rodnosti pod enostavno obnovo prebivalstva v t. i. industrijskih državah. Prvi se nanaša na ukrepe za dvig stopenj rodnosti, tj. pronatalistični scenarij, drugi pa na ukrepe za izboljšanje razmerja med delovno aktivnim in vzdrževanim prebivalstvom s pomočjo mednarodnih priselitev, tj. migracijski scenarij« (več o tem v Knežević Hočevar 2006, 2011).

3 Tu je nujno opozoriti, da je že sama definicija starosti premakljiva. Običajen mejnik, ki v t. i. razvitih družbah določa starejšega človeka, je 65 let. Kljub temu se pri nekaterih migrantih, zlasti tistih, ki opravljajo težka in nekvalificirana dela, že po petdesetem letu ali celo prej pojavljajo poklicne bolezni in hendikepi, zaradi katerih ne morejo več opravljati plačanega dela, zato so zanje že takrat pomembna in aktualna vprašanja, povezana s t. i. starejšimi migranti, na primer vprašanja pokojninskega varstva in oskrbe (Warnes, Williams 2006: 1258). Velja tudi nasprotno, številne osebe ostanejo aktivne na trgu dela tudi v pozni starosti.

4 Besedilo je nastalo v okviru temeljnega podoktorskega projekta Socialne konstrukcije migrantskih statusov in njihov vpliv na procese selekcioniranja in integracije migrantov (financer: ARRS, trajanje: 2009–2010 in 2012; številka pogodbe: 1000-09-212066). Predstavljeni so tudi nekateri izsledki raziskave FEMAGE: Needs for female immigrants and their integration in ageing societies (Potrebe po migrantkah in njihova integracija v starajočih družbah), ki je potekala v okviru 6. okvirnega programa Evropske komisije (2006–2007; številka pogodbe: SSP4-CT-2005-022355).

tudi migracije starejših oseb. Posebej analiziramo nove oblike skrbi za starejše, ki smo jim z razmahom mednarodnih migracij priča v transnacionalnih družinah. Te so namenjene tako starejšim migrantom in migrantkam kot tudi ostarelim osebam, za katere skrbijo migranti. V nadaljevanju besedila shematski prikaz temeljnih skupin starejših migrantov in migrantk nadgradimo z analizo njim namenjenih migracijskih in socialnih politik. Čeprav imajo tudi upokojene osebe, ki migrirajo zlasti iz severnih v južne predele Evrope, težave z dostopom do socialnega in zdravstvenega varstva v državi, v katero so se preselile, se kljub temu zdi, da so v tem smislu bolj ranljive skupine starejših migrantov in migrantk, ki so se postarali v državi, v katero so se preselili, zato se v večji meri osredotočamo prav na to skupino prebivalstva. Na podlagi ugotovitev so podane smernice za nadaljnje proučevanje pričujoče tematike tako na ravni Slovenije kot na širši ravni Evropske unije.

MIT O VRNITVI »DELOVNIH MIGRANTOV« – STARANJE MIGRANTOV V »NOVIH DRUŽBAH«

Spregled povezave med migracijami in staranjem prebivalstva je v veliki meri posledica dejstva, da bivanja migrantov v zahodnoevropskih družbah med oblikovalci politik in v širši javnosti ni bilo obravnavano kot trajen, temveč kot začasen pojav. Zdelo se je namreč, pravita Peter Dwyer in Dimitris Papadimitriou (2006: 1305), da bodo delavci, ki so jih vlade teh držav zlasti od petdesetih do sredine sedemdesetih let 20. stoletja rekrutirale iz Južne in Vzhodne Evrope in Severne Afrike, da bi zapolnile primanjkljaj delovne sile v določenih gospodarskih panogah, v teh državah ostali le začasno. Številni raziskovalci, pri tem so prednjačili socialni geografi in socialni gerontologi, so v svojih analizah obravnave povezave med migracijami in staranjem prav zato poudarili, da so predvsem vlade tistih evropskih držav,⁵ za katere je značilen t. i. »sistem gostujočih delavcev« (guest worker system), predpostavljale, da bodo migranti v omenjenih državah ostali le omejen čas in se prej ali slej vrnili v izvorno družbo (Brockmann, Fisher 2001; Warnes idr. 2004; Bolzman idr. 2006; Warnes, Williams 2006; White 2006). Anthony Warnes in Allan Williams (2006: 1267) govorita celo o »mitu o množični vrnitvi delovnih migrantov«. Iz tega razloga so oblikovalci politik manj pozornosti namenili socialnemu varstvu in blaginji migrantov in migrantk, ki se v družbah, v katere so prišli, tudi starajo (Bolzman idr. 2006: 1360). Temeljni motiv za bolj sistematično proučevanje tem, povezanih s staranjem migrantov, pa je bilo nedvomno dejstvo, da je zlasti od sedemdesetih let 20. stoletja na politični ravni in med prebivalstvenimi strokovnjaki postalo vedno bolj očitno, da se večina migrantov ne bo vrnila v državo, iz katere je prišla. V zadnjih desetletjih so tako prav »delovne migrante«, ki so se v Evropo in znotraj Evrope priseljevali od štiridesetih let 20. stoletja in so v novih družbah »ostareli«, strokovnjaki prepoznali kot najhitreje rastočo skupino starejših migrantov. V »novo družbo« so pogosto prišle tudi njihove družine oziroma so si migranti v tej družbi družine šele ustvarili.⁶ Posledično je predvsem v zadnjih dveh desetletjih naraslo število študij, ki so obravnavale staranje migrantov in migrantk v družbi, v katero so se preselili, in njihove namere vrnitve v državo, iz katere so migrirali (na primer Leavey idr. 2004; Bolzman idr. 2006). Claudio Bolzman in sodelavci (2006) so na primer leta 1994 proučevali izkušnje oseb, ki so se v Švico (na območje Basla in Ženeve) preselile iz Španije in Italije in so bile tik pred upokojitvijo. Ugotovili so, da jih večina želi ostati v Švici ali pa vsaj

5 Med temi državami je zlasti prednjačila Nemčija.

6 Strokovnjaki, ki so leta 2002 na Univerzi v Leedsu sodelovali na delavnici o migraciji in družini, so med temeljnimi raziskovalnimi temami, ki nujno zahtevajo teoretično konceptualizacijo (Bailey, v Bailey, Boyle 2004: 233), poudarili vedno večjo raznolikost gospodinjstev, v katerih živijo starejši prebivalci, in opozorili na posledice omenjenih trendov za medgeneracijske skrbstvene aranžmaje. Temeljna vprašanja v tem smislu se po Michaeli Brockmann in Mikeu Fisherju (2001: 353) ukvarjajo zlasti z različnimi življenjskimi okoliščinami starejših migrantov v primerjavi s t. i. večinskim prebivalstvom in vpliv same izkušnje migracije na življenjski potek mednarodnih migrantov, h katerim se bomo vrnili v nadaljevanju besedila.

živetih med Švico in Italijo/Španijo, najmanj priljubljena možnost med sogovorniki, zlasti med tistimi iz Italije, pa je bila vrnitev v matično državo. Na tej podlagi so sklenili, da je klasični model izbire med »ostati v novi državi« ali »vrniti se v izvorno državo« zamenjal »model kroženja« oziroma bivanja tako v eni kot v drugi državi. Gerard Leavey in sodelavci (2004) so analizirali izkušnje oseb, starih nad 65 let, ki so se v Veliko Britanijo preselile iz Irske. Tudi ta skupina raziskovalcev je ugotovila, da se kljub temu da so svojo migracijo večinoma razumele kot začasen pojav, večina vprašanih oseb ne namerava vrniti v Irsko. Splošna ugotovitev raziskav, ki so obravnavale starejše migrante, ki so se postarali v državi, v katero so se preselili, je, da številni nimajo dovolj ekonomskih virov in kulturnega kapitala ter da se za specifične oblike pomoči zanašajo v glavnem na člane svoje etnične skupnosti in družine (White 2006; Ruspini 2009). Omenjeno ugotovitev bomo nadalje analizirali v drugem delu besedila, kjer bodo predstavljene implikacije staranja migrantov in migrantk za oblikovanje migracijskih, socialnih in drugih politik.

MIGRACIJE STAREJŠIH OSEB

Saša Božić (2006: 1416) je v svojem pregledu raziskav na področju mednarodnih migracij upokojenih oseb ugotovil, da je tovrstna tematika zaradi svoje interdisciplinarne narave pritegnila raziskovalce iz številnih disciplin, zlasti pa socialne geografije, socialne gerontologije in sociologije.⁷ Saša Božić (2006: 1416) meni, da so migracije starejših oseb v Evropi bolj, kot to velja za ZDA, Avstralijo in Japonsko, mednarodnega značaja. To sproža vprašanja transnacionalnih povezav starejših migrantov in migrantk med dvema ali celo več nacionalnimi državami. Zlasti od devetdesetih let 20. stoletja so namreč raziskovalci v Evropi vedno bolj zaznavali predvsem pojav preseljevanja upokojenih prebivalcev s severoevropskih območij v države Južne Evrope (na primer v Španijo in Italijo, še posebej v obalne in/ali ruralne predele teh držav) (na primer King idr. 1998, 2000; O'Reilly 2000, 2003; 2007; King 2002; Oliver 2002, 2007; Warnes idr. 2004; Warnes, Williams 2006). Razlog za naraščajoče število starejših migrantov in migrantk so proučevalci omenjenih procesov iskali predvsem v internacionalizaciji prostočasnih izletov, zaposlitve in izobrazbe kot eni od posledic naraščajočih dohodkov prebivalstva ter razvoja transportnih in komunikacijskih tehnologij. Številni raziskovalci so tovrstno migracijo označili za migracijo z namenom spremembe življenjskega stila (t. i. lifestyle migration)⁸ (na primer King 2002; Oliver, O'Reilly 2010), ki naj bi omogočil lepše vreme, počasnejši način življenja, nižje življenjske stroške in nasploh nudil boljšo kakovost življenja kot na primer Velika Britanija.⁹ Enega od pionirskih raziskovalnih projektov, ki je proučeval migracije starejših oseb iz Velike Britanije v države Južne Evrope, so v letih 1995 in 1996 izvedli Russell King, Guy Petterson, Tony Warnes in Allan Williams (King, Patterson 1998; King idr. 1998, 2000; Warnes, Patterson 1998; King 2002). Temeljni cilj projekta je bil raziskati priseljevanje upokojenega prebivalstva Velike Britanije na območje Toskane v Italiji, Malte, Coste del Sol v Južni Španiji in v regijo Algarve na Portugalskem. Pri tem so raziskovalci kot osrednjo raziskovalno metodo uporabili metodo globinskih intervjujev, ki so jo nadgradili z uporabo zgodovinskih virov, uradnih statistik in bolj strukturiranih vprašalnikov. Ključni rezultat projekta je bila prva obsežnejša podatkovna baza o mednarodni migraciji upokojenih oseb v Evropi (King idr. 1998). V primerjalni analizi položaja oseb iz Velike Britanije, ki živijo v navedenih državah (King idr. 1998: 97–98), so avtorji poudarili razliko med časovno dinamiko preseljevanja: v Italijo in na Malto so se Britanci v večjem številu preseljevali že pred letom 1975, med-

7 Treba je poudariti, da meja med pojmi mednarodna migracija, sezonska oziroma krožna migracija, mobilnost in turizem ni jasna, kar je po mnenju številnih proučevalcev omenjenih tematik (King in sod. 1998, 2000; King 2002; O'Reilly 2003; Božić 2006) poseben izziv za spremljanje in analizo tovrstnih prebivalstvenih gibanj. Pričujoča raziskovalna tematika tako posega zlasti na polja migracijskih študij, turizma in socialne gerontologije.

8 Tu ne gre le za migracijo starejših oseb, temveč tudi za migracijo mlajših prebivalcev; tako samskih oseb kot tudi družin.

9 O tovrstni migraciji je bilo namreč največ študij opravljenih prav na primeru prebivalcev Velike Britanije (na primer King, Patterson 1998; King in sod. 1998, 2000; O'Reilly 2000, 2003, 2007; King 2002; Oliver 2002, 2007).

tem ko so se v Costo del Sol v južni Španiji in v regijo Algarve na Portugalskem večinoma preseljevali od osemdesetih let prejšnjega stoletja. Analiza je tudi pokazala, da je to, kdo bo migriral, pomembno določala kategorija družbenega razreda, saj je bilo na primer med proučevanimi osebami le malo fizičnih delavcev (King idr. 1998: 99). Britanci v Toskani so imeli na splošno višjo raven izobrazbe kot druge proučevane skupine. Nadalje je analiza pokazala, da so Britanci na Costi del Sol in na območju regije Algarve v večji meri kot tisti na Malti in v Toskani živeli med Veliko Britanijo in Španijo oziroma Portugalsko (King idr. 1998: 101–102). Zlasti so raziskovalci poudarili večinoma slabo znanje jezika držav, v kateri so živeli starejši Britanci, vendar pa so opozorili, da ne gre nujno za izoliranost od t. i. večinskega prebivalstva, saj so se številni Britanci za tovrsten način življenja odločili prostovoljno (King idr. 1998: 105). Kot so avtorji analize ilustrativno zapisali na primeru regij Algarve in Coste del Sol: »za veliko upokojenih oseb na omenjenih območjih morda ni toliko relevantna socialna integracija z lokalnim prebivalstvom, torej s Španci in Portugalci, temveč zadovoljiv dostop do lokalnih storitev in interakcij s pripadniki lastne izseljenjske skupnosti« (King idr. 1998: 102). Avtorji raziskave pa so posamezne primere tudi bolj podrobno raziskali. Russell King in Guy Patterson (1998: 179) sta na primeru migracij Britancev v Toskano ugotovila, da so bili razlogi za tovrstno migracijo povezani zlasti z razumevanjem Toskane kot svojevrstne »ruralne idile«. Na svojem proučevanem primeru sta poudarila tudi dokajšnjo problematičnost koncepta mednarodnih migracij upokojenih oseb kot enkratnega dogodka. Večina obravnavanih oseb je bila namreč že prej povezana z Italijo, oziroma so se tja preselili že pred upokojitvijo (na primer migracije z namenom zaposlitve, poroke), številni so pred upokojitvijo imeli tudi izkušnje migracije v druge države. Warnes in Patterson (1998: 130) sta proučevala upokojene Britance, ki so se preselili na Malto, in ugotovila, da so vzorci naseljevanja Britancev na tem območju kompleksnejši, kot to velja za druga proučevana območja. To sta pripisala zgodovinski prisotnosti Britancev na tem območju in posledično številčnejšim družinskim vezem, saj je manj kot polovica sogovornikov Malto pred upokojitvijo doživela le kot počitniško destinacijo. Williams in Patterson (1998: 130) sta analizirala vzorce naseljevanja Britancev na območje regije Algarve na Portugalskem. S kohortno analizo, ki jima je omogočila analizirati časovno dinamiko poselitve, sta ugotovila, da so migracije upokojenih oseb na to območje spodbujali zlasti ekonomska globalizacija in posledično vedno večje število tujih delavcev, naraščajoč standard in pokojnine ter razvoj turistične infrastrukture na tem območju, zlasti odprtje letališča v Faru leta 1965. Na tem območju sta opazila tudi velike razlike v socio-ekonomskem položaju Britancev.

Vicente Rodríguez in sodelavci (1998) so v nasprotju s študijami, ki so proučevale zlasti prebivalstvo iz ene države – najpogosteje Velike Britanije – opravili primerjalno analizo izkušen upokojenih prebivalcev različnih severnoevropskih držav (Velike Britanije, Nemčije, držav Beneluksa, skandinavskih držav), ki se preseljujejo na območje Coste del Sol v Južni Španiji. Ugotovili so, da je bil glavni razlog za migracijo oseb iz vseh proučevanih držav domnevno boljša kakovost življenja, posebej poudarjeno je bilo na primer toplejše podnebje. Sogovorniki iz Velike Britanije so bolj kot druge skupine poudarjali težavno komunikacijo zaradi slabega znanja španskega jezika. Tako Nemci kot prebivalci skandinavskih držav in držav Beneluksa so večkrat omenjali svoje zanimanje za špansko kulturo in pokrajino ter po njihovem mnenju bolj zdravo življenjsko okolje kot v njihovih »domačih državah«. Prebivalci skandinavskih držav so bolj kot druge skupine poudarjali problematičnost fizične razdalje med Španijo in Skandinavijo in posledično ločenost od sorodnikov in prijateljev.¹⁰

Na prvi pogled se morda zdi, da tovrstna migracija starejših oseb presega delitve na podlagi socio-ekonomskega položaja, saj naj bi se za migracijo odločili zlasti posamezniki in posameznice z boljšim

10 Mednarodne migracije starejših so zlasti v zadnjih dveh desetletjih pritegnile tudi večjo pozornost raziskovalcev v ZDA. Ti najpogosteje proučujejo starejše migrante, ki so se iz drugih zveznih držav preselili v t. i. Sončni pas (Sun Belt), ki obsega zlasti območje zveznih držav Florida in Kalifornija (na primer Palo Stoller in sod. 2001; Longino in sod. 2002). Tovrstnih raziskav v pričujočem besedilu podrobneje ne obravnavamo, saj nas prvenstveno zanimajo mednarodne migracije starejših. To seveda ne pomeni, da se tudi osebe, ki se iz različnih razlogov preseljujejo znotraj države, v kateri živijo, ne soočajo z nekaterimi podobnimi težavami, ki so jih poudarile študije mednarodnih starejših/upokojenih migrantov in migrantk.

ekonomskim položajem. Vendar sta tudi Caroline Oliver in Karen O'Reilly (2010), kot so zaznali že avtorji zgoraj omenjene pionirske študije o priseljevanju starejših prebivalcev Velike Britanije v države Južne Evrope, na podlagi svojih prejšnjih –med seboj sicer nepovezanih – empiričnih študij Britancev, ki se preseljujejo na območje province Malaga v južni Španiji, opozorili, da to skupino prebivalstva še vedno diferencira kategorija družbenega razreda.¹¹ Povedano z njunimi besedami, »nekateri [Britanci v Španiji, op. avt.] so uspeli spremeniti svojo življenjsko pot in so s pomočjo migracije z namenom spremembe življenjskega stila uresničili svoje sanje, toda gledano v celoti so se njihove razredne pozicije reproducirale skozi razlike v habitusu¹² in v ekonomskem in socialnem kapitalu« (Oliver, O'Reilly 2010: 50).

Migracije starejših oseb nedvomno spreminjajo strukturo prebivalstva na območjih, kamor se te osebe priseljujejo. William Walters (2002: 38) poudarja, da se s tovrstno migracijo močno zvišuje koncentracija starejšega prebivalstva na določenih območjih, kar vpliva na starostno strukturo prebivalstva na regionalni, v manjši meri pa tudi na nacionalni ravni (prim. King idr. 1998: 93).

Walters (2002: 38) nadalje opozarja, da so tovrstne migracije v javnosti prepoznane tudi kot pomemben dejavnik lokalnega in regionalnega ekonomskega razvoja. Luis Guarnizo (v Božić 2006: 1419) je na primer poudaril pomen denarnih nakazil migrantov v države, iz katerih ti prihajajo, saj so ti transferji pogosto pomemben vir podpore za razvoj lokalne skupnosti. V državah, v katere se množično preseljujejo starejše osebe, se je izoblikoval tudi razvejan trg nepremičnin. Številne osebe, ki živijo v drugih državah, imajo raje izdelke iz »domače države«, kar ima po besedah Guarniza (v Božić 2006: 1419) »pomembne transnacionalne ekonomske učinke«.

Warnes in sodelavci menijo (2004: 312), da so raziskovalci precej manj pozornosti kot starejšim migrantom, ki se v novi družbi starajo, in migracijam starejših oseb, ki bi jih lahko uvrstili v kategorijo t. i. migracij z namenom spremembe življenjskega stila, namenili »delovnim migrantom«, ki se vračajo v državo izvora,¹³ ter starejšim migrantom, ki se preselijo v drugo državo, da bi živeli bližje svoji družini ali celo skupaj z njo. Dwyer in Papadimitriou (2006: 1312) opažata tudi naraščanje števila starejših prisilnih migrantov. Pravita, da pripadniki te skupine prebivalstva na splošno še težje kot druge skupine migrantov najdejo zaposlitev, če pa se to že zgodi, ni verjetno, da bodo zbrali dovolj let delovne dobe, da bi bili v državi, v katero so se priselili, upravičeni do pokojnine.¹⁴

SKRB NA DALJAVO V TRANSNACIONALNIH DRUŽINAH

Vedno bolj mednarodni značaj sodobnih migracij je v migracijskih študijah in študijah družine zlasti v zadnjih dveh desetletjih povzročil tudi precejšen razmah raziskav, ki proučujejo različne vidike življenja in usklajevanja družinskih obveznosti med nacionalnimi državami. Zlasti so raziskovalci opazili trend naraščanja števila transnacionalnih družin (Bryceson 2002; Evergeti 2006; Baldassar 2007a, 2007b), katerih življenje poteka med dvema nacionalnima državama ali več državami. Omenjene družine si med seboj izmenjujejo različne načine skrbi in podpore, kot so na primer finančna, praktična, osebna, čustvena in moralna pomoč ter nudenje nastanitve ob obiskih (Baldassar 2007b: 389). Tovrstni aranžmaji vključujejo tako starejše migrante in migrantke, ki so se postarali v družbi, v katero so se priselili, kot tudi migracije starejših oseb. Venetia Evergeti (2006: 348) govori kar o nekakšnih transnacionalnih pogajanjih o družin-

11 Več v O'Reilly 2000, 2003, 2007; Oliver 2002, 2007.

12 Pri tem sta se opirali na teoretični prispevek sociologa Pierra Bourdieuja.

13 Jelena Predojević-Despić (2011) meni, da prav povratne migracije in/ali transnacionalne aktivnosti, ki razvijajo družbena in družinska omrežja, lahko zelo pozitivno vplivajo tako na kakovost življenja starejših povratnikov in njihovih družin kot tudi na lokalno okolje, v katerega se povratniki priselijo, oziroma s katerim vzdržujejo intenzivne stike.

14 Pregled relevantne literature je v primerjavi z dokajšnjim razmahom študij o mednarodnem preseljevanju starejših oseb z namenom spremembe življenjskega stila pokazal, da le majhno število študij obravnava migracije starejših oseb v kontekstu prisilnih priselitev in migracije z namenom združevanja družine.

skih obveznostih med »domačo« in novo družbo. Najširše gledano gre za proces transnacionalnega nudenja skrbi tako med državami kot tudi med generacijami (Evergeti 2006; Wilding 2006; Zontini 2006). Tovrstna skrb poleg skrbi za otroke, ki so ostali v državi izvora,¹⁵ zaradi procesov staranja prebivalstva na poseben način vključuje tudi starejše osebe, katerih družinski člani živijo v drugih državah. Kljub fizični razdalji med družinskimi člani potekajo raznovrstne interakcije, ki jih v veliki meri omogočajo in lajšajo sodobne komunikacijske in potovalne tehnologije (Wilding 2006; Baldassar 2007a, 2007b).

Opisane prakse transnacionalnega nudenja skrbi v veliki meri presegajo prevladujoče pojmovanje skrbi kot aktivnosti, za katero je potrebna fizična bližina. Nekateri avtorji v tem smislu govorijo celo o t. i. skrbi na daljavo (Silk 1998; Vellekoop Baldock 2000). Zanimivo je, da je kar nekaj raziskav na to temo v kontekstu staranja prebivalstva obravnavalo transnacionalno nudenje skrbi med Avstralijo in zahodnoevropskimi državami / Severno Ameriko. Cora Vellekoop Baldock (2000) je na primer leta 1996 zbirala življenjske zgodbe migrantov, ki so v Avstralijo prišli iz večinoma angleško govorečih držav (Združenega kraljestva in Severne Amerike). Ugotovila je, da so prakse nudenja skrbi ostarelim staršem v »domačih državah« postale intenzivnejše, ko je eden od staršev ovdoval, in da so se otroci, ki so migrirali, o načinih pomoči neprestano »pogajali« z drugimi sorodniki. Med načini skrbi je bolj kot vsakodnevna praktična skrb za starše prevladovala emocionalna podpora, med obiski pa je bila konkretna pomoč otrok, ki so migrirali, enako, če ne še bolj, pomembna kot skrb, ki so jo nudili drugi odrasli otroci, ki so živeli blizu staršev. Vellekoop Baldock (2000: 221) poudarja, da so se razlike med spoloma v nudenju skrbi pokazale zlasti glede na tip opravil, ki so jih opravljali moški oziroma ženske.¹⁶ Moški so bolj skrbeli za poslovne zadeve, popravila in vzdrževalna dela, ženske pa v večji meri za zdravstvene težave in emocionalno podporo. Kljub temu je opozorila, da so tako moški kot tudi ženske, s katerimi se je pogovarjala, s svojimi starši ohranili tesno komunikacijo in razvejane podperne mreže. Na svojem proučevanem primeru je poudarila, da se razlike med spoloma v nudenju skrbi s povečevanjem geografske razdalje zmanjšajo. Cora Baldock, Loretta Baldassar¹⁷ in Raelene Wilding so med letoma 2000 in 2005 kot nadgradnjo preteklega raziskovanja transnacionalne skrbi¹⁸ vodile obsežno raziskavo o transnacionalnem nudenju skrbi starejšim, ki je vključevala tako migrantke in migrantke v Avstraliji kot tudi njihove starše v Italiji, na Nizozemskem, Irskem, v Singapurju, Novi Zelandiji in Iranu. Rezultati obsežnega projekta so predstavljeni v monografiji *Families Caring Across Borders: Migration, Ageing and Transnational Caregiving* (Baldassar idr. 2007) in več znanstvenih člankih (Wilding 2006; Baldassar 2007a, 2007b). Loretta Baldassar (2007b) je na primeru oseb iz Italije, ki živijo v Avstraliji, identificirala številne oblike transnacionalnega nudenja moralne in emocionalne podpore in na tej podlagi preverjala idejo, da so tovrstne vezi v transnacionalnih družinah vedno manj pomembne. Prav tako je ugotovila, da je migracija pogosto rezultat potrebe tako po dajanju kot tudi prejemanju skrbi ter da so transnacionalni odnosi v družinah odvisni od specifičnih značilnosti obdobjev v življenjskem poteku posamezne družine (Baldassar 2007a: 294). Tudi ta raziskava je potrdila domnevo, da je tok podpore med otroki in njihovimi starši dvosmeren, saj so raziskovalke ugotovile, da starajoči starši svojim otrokom pogosto nudijo več podpore, kot pa je to veljalo v obratni smeri. Izjema so bili le begunci, vendar so raziskovalke tudi med njimi identificirale dvosmeren tok družinskih skrbstvenih mrež (Wilding 2006: 129). Baldassar (2007a: 278) meni, da je obravnavanje skrbi kot enosmernega procesa – zlasti otroka za starajoče starše – posledica predstave, da je starost

15 Tu gre zlasti za raziskave transnacionalnega materinstva, ko matere »doma« pustijo otroke, za katere skrbijo drugi družinski člani (na primer Parreñas Salazar 2001; Wilding Isaksen in sod. 2008). Dejstvo, da je transnacionalno očetovstvo v javnosti in tudi med raziskovalci deležno manj pozornosti, je verjetno mogoče pojasniti s prevladujočimi ideologijami o spolu, ki materinstvo, bolj kot to velja za očetovstvo, konstruirajo kot »naravno« vlogo. Ženske, ki v fizičnem smislu »zapustijo« svoje otroke, so posledično v večji meri kot moški deležne obsojanja.

16 Pričakovanja v zvezi z nudenjem skrbi so prav tako diferencirana po spolu. Chiara Saraceno (2010: 40) s tem v zvezi meni, da so ženske bolj kot moški vpete v kulturna pričakovanja o nudenju skrbi v medgeneracijski verigi.

17 Loretta Baldassar (2007a, 2007b) je že prej proučevala transnacionalno skrb na primeru migrantov in migrantk iz Italije v Avstraliji.

18 Pilotni projekt o transnacionalnem nudenju skrbi je potekal v poznih devetdesetih letih prejšnjega stoletja.

enotna kategorija v življenjskem poteku, za katero je značilna naraščajoča odvisnost starejših. Pri taki obravnavi starosti se namreč spregleda dejstvo, da so tudi starejši dejavni udeleženci transnacionalnih mrež, ki mobilizirajo sorodstvene in skupnostne resurse.

Podobne študije so bile zlasti v zadnjem desetletju opravljene tudi v evropskem prostoru. Minna Zechner (2008: 40–41) je na primer v letih 2001 in 2002 na primeru žensk iz Estonije, ki živijo na Finskem, in skrbijo za svoje ostarele starše v Estoniji, ugotovila, da so se sogovornice znašle med dvema različnima »kulturama skrbi«. Estonsko, kjer naj bi za ostarele skrbeli družinski člani, zlasti ženske, in finsko, kjer so storitve, ki posameznikom in posameznicam pomagajo pri skrbi za ostarele družinske člane, precej bolj razvite kot v Estoniji. Poudarila je dejstvo, da »socialne politike spodbujajo specifično verzijo družbene odgovornosti, vendar le v nacionalnem kontekstu, saj na primer finančni dodatek za skrb dobivajo le osebe, ki skrbijo za starejše, ki živijo na Finskem« (Zechner 2008: 42). Taka ureditev priča o segmentu socialne politike, ki ni ustrezno prilagojen transnacionalnim oblikam skrbi, zato se v nadaljevanju ukvarjamo z implikacijami staranja migrantov in migrantk za oblikovanje različnih politik.

SOCIALNA IN MIGRACIJSKA POLITIKA – POSEBNE POTREBE STAREJŠIH MIGRANTOV IN MIGRANTK?

Warnes in sodelavci (2004: 314) opozarjajo, da na položaj starejših migrantov vplivajo številni dejavniki, kot so njihova življenjska zgodovina, razvitost socialnega omrežja in družbenoekonomski položaj pa tudi nacionalne migracijske in socialne politike, ki določajo njihove pravice iz naslova socialnega, zdravstvenega in pokojninskega varstva (prim. Dwyer, Papadimitriou 2006). V migracijskih politikah je tako določen status migrantov in migrantk v »novi družbi« (na primer pravica do plačanega dela in posledično pokojninskega zavarovanja) in opredeljen njihov dostop do socialnovarstvenih storitev, socialne politike pa določajo dostop do storitev socialnega varstva za starejše prebivalce (prim. Warnes, Williams 2006: 1267).

Ne smemo zanemariti ugotovitve Warnesa in Williamsa (2006: 1268), da migrantov in migrantk ne smemo obravnavati kot pasivnih žrtev, temveč kot dejavne posameznike in posameznice, ki vplivajo na oblikovanje politik. O tem Sandra Torres (v Warnes, Williams 2006: 1268) pravi, da bi se morali raziskovalci izogibati obema skrajnostma: po eni strani neupoštevanju posebnih potreb starejših migrantov in migrantk, po drugi strani pa »problematizaciji« omenjenih skupin le zato, ker so migranti in jih razumejo kot »drugačne« od večinskega prebivalstva. Paul White (2006: 1297) v tem smislu govori o nevarnosti esencijalizacije starejših migrantov, ki naj bi imeli v primerjavi z »domačim prebivalstvom« posebne potrebe. Meni, da so se številni v novo družbo vključili v takšni meri, da se po resursih, ki jih imajo na voljo v starosti, po pričakovanjih za starost in po materialnem stanju ne razlikujejo več znatno od »večinskega prebivalstva«. Kljub temu White (2006: 1297–1298) navaja rezultate več študij, ki so vendarle pokazale, da številni starejši migranti nimajo dovolj resursov in kulturnega kapitala, zato se po pomoč v večji meri kot »večinsko prebivalstvo« obračajo na svojo skupnost ali družine. Starejši migranti se torej soočajo s posebnimi težavami, ki so do sedaj pritegnile majhno pozornost raziskovalcev in oblikovalcev politik (Patterson 2004: 26; Warnes idr. 2004: 308).¹⁹ Michaela Brockmann in Mike Fisher (2001) sta na primer v študiji položaja starejših migrantov in socialnega skrbstva v Avstriji poudarila dejstvo, da imajo migranti prav zaradi dolgotrajne marginalizacije na trgu delovne sile, kjer so slabo plačani in pogosto opravljajo težka fizična dela, v starosti nižje dohodke kot t. i. večinsko prebivalstvo, zato tudi pogosteje potrebujejo storitve socialnega in zdravstvenega varstva. Brockmann in Fisher (2001: 359–361) menita, da je pred-

¹⁹ To je v veliki meri posledica dejstva, da se oblikovalci javnih politik osredotočajo na mlajše migrante, kot so delavci, begunci in prosilci za azil. Tudi uradne statistike večinoma ne vključujejo bolj podrobnih podatkov o starejših migrantih in migrantkah.

postavka, da imajo migranti že skoraj avtomatično na voljo socialno podporo in skrb s strani družinskih članov, problematična. Med starejšimi migranti je namreč načeloma več moških kot žensk, od katerih se v večji meri pričakuje, da bodo nudile skrb v družini. Zdi se, da so glede pomanjkanja socialnih omrežij tako zlasti ogroženi starejši samski moški. Iz omenjenih razlogov bo najbrž v prihodnje tudi za starejše migrante in migrantke potrebnih več profesionaliziranih storitev. Nadalje avtorja poudarjata (Brockmann, Fisher 2001: 360), da se tako z izkušnjo migracije kot tudi družbenega konteksta v »novi družbi« spreminjajo tudi vrednote o družinskih obveznostih, medgeneracijski recipročnosti in vlogah med spoloma.

V zvezi z vrednotami in s predstavami o staranju je Torres (v White 2006: 1298) opozorila, da se pokazatelji »uspešnega staranja« ne le nenehno spreminjajo, temveč so tudi kulturno specifični. Tovrstne študije opozarjajo, da so za razumevanje staranja temeljnega pomena tudi dejavniki, povezani z etničnim in/ali s priseljenkim statusom posameznika oziroma posameznice. To dejstvo v javnosti in med oblikovalci politik po Whitu (2006: 1298) sproža razprave o posamezni kulturi primernim institucionalnim odzivom na staranje prebivalstva. Sharon Wray (2003: 512) meni, da raziskovalci v okviru gerontoloških študij pogosto pomanjkljivo proučujejo raznolikost pomenov konceptov, kot so kakovost življenja, delovanje in opolnomočenje. Te nekritično uporabljajo kljub njihovi kulturni specifičnosti in variabilnosti glede na pripadnost določeni kulturi in/ali etnični skupini. Socialna gerontologija se je po Wray (2003: 517) namreč predvsem osredotočala na težave, ki jih imajo posamezniki in posameznice v starosti. Nadalje so socialni gerontologi po njeni oceni kot temeljno merilo »uspešnega staranja« uporabljali »zahodnjaške« pojme o mladostnem videzu in življenjskem slogu v smislu obvladovanja lastnega življenja in neodvisnosti od drugih oseb. Tovrstnih pojmov o starosti in skrbi seveda ne moremo univerzalno aplicirati na vsa kulturna okolja.²⁰

Raziskovalci posledično poudarjajo prav nujnost proučevanja raznolikosti starejših migrantov in migrantk (Warnes idr. 2004; Dwyer, Papadimitriou 2006; Warnes, Williams 2006). Zlasti se zdi, da obstajajo velike razlike med državljani članic Evropske unije in državljani t. i. tretjih držav in glede na način preselitve v drugo državo. Dwyer in Papadimitriou (2006) sta na primer pokazala, da starejši državljani držav članic Evropske unije, ki se v drugo državo preselijo po upokojitvi, nimajo dostopa do socialnih pravic v obsegu, kot so jih deležni državljani članic Evropske unije, ki se kot delavci preseljujejo znotraj Unije. Menita, da tak zakonski in finančni okvir Evropske unije odraža njeno že skoraj endemično preokupacijo s pomenom plačanega dela. Pravica omenjenih oseb do bivanja v drugi državi Evropske unije je omejena z dvema pogojema: da imajo urejeno zavarovanje za primer bolezni in da imajo v času bivanja dovolj sredstev, da ne bodo breme sistemu socialnih pomoči v državi, v katero so se preselili (Direktiva 90/364, citirano v Dwyer, Papadimitriou 2006: 1309). Dravljanji »tretjih držav«, ki migrirajo v države Evropske unije, nimajo dostopa do nobenih pravic, ki bi jim jih zagotavljalo državljanstvo držav članic Evropske unije. Pri uveljavljanju pravic iz naslova socialnega varstva so odvisni od posameznih držav članic, saj njihove potrebe niso obravnavane kot stvar socialne politike Evropske unije. Čeprav si lahko v državi članici s plačevanjem prispevkov za pokojninsko varstvo zagotovijo pokojnino, avtorja opozarjata, da bo ta zaradi visokih stopenj brezposelnosti med državljani »tretjih držav« in njihove koncentracije v sektorjih, ki zahtevajo nizko stopnjo usposobljenosti, najverjetneje nizka. Zaradi družinskih obveznosti in v nekaterih primerih tudi kulturnih dejavnikov, ki ne spodbujajo plačanega dela žensk, je ta težava za migrantke še bolj izražena. Kljub temu da je po oceni Dwyerja in Papadimitriouja (2006)

20 V tem kontekstu je na primer zanimiva kvalitativno zasnovana študija žensk, starih med 50 in 69 let, ki so v Veliki Britaniji prišle iz Japonske (Izuhara, Shibata 2001). Nekatero so jasno povedale, da bi želele, da zanje skrbí nekdo, ki je japonskega porekla, kar sta raziskovalki pripisali primerom, ko so starejše ženske zaradi kapi ali demence izgubile sposobnost komuniciranja v drugem jeziku (v tem primeru angleščini). Zaradi razlik v prehrani, jeziku in pomanjkanja skupnih izkušenj so številne izražale tudi nepripravljenost za preselitev v dom za starejše, kjer bi bilo večinsko prebivalstvo britanskega porekla. Iní Grewal in sodelavci (2004: 757) so na primeru starejših oseb iz različnih etničnih skupin, ki živijo v Veliki Britaniji, podobno opozorili na kulturno specifične predstave o avtonomiji, nadzoru nad svojim življenjem in odvisnosti od drugih.

govor o reformi pokojninskega sistema vedno bolj konstruiran tudi na ravni Evropske unije, zmožnost institucij Evropske unije, da se neposredno vmešavajo v blaginjske sisteme posameznih držav, še vedno omejuje načelo subsidiarnosti.²¹ Če povzamemo: opravljene raziskave so po eni strani pokazale, da so starejši migranti in migrantke med najbolj prikrajšanimi in družbeno izključenimi skupinami prebivalstva v evropskih družbah, hkrati pa tudi med nosilci inovativnih, pozitivnih pristopov do staranja (prim. Warnes idr. 2004: 310).

ZAKLJUČKI IN IMPLIKACIJE UGOTOVITEV

Na podlagi empiričnega in teoretičnega gradiva, ki je plod zlasti nedavnega raziskovalnega zanimanja za to skupino prebivalstva, so v besedilu najprej predstavljene temeljne skupine starejših mednarodnih migrantov in migrantk. Pokazalo se je, da so ti izjemno raznolika skupina, ki pa ima, v primerjavi z »večinskimi prebivalstvom«, le v določenih primerih posebne potrebe. Čeprav so tako staranje prebivalstva kot mednarodne migracije med prebivalstvenimi strokovnjaki prepoznani kot temeljni dejavniki spreminjanja prebivalstvene sestave, na podlagi presoje teoretičnih in empiričnih obravnav staranja migrantov in migrantk lahko sklenemo, da starejši mednarodni migranti in migrantke še vedno niso prioriteta politik Evropske unije kot tudi ne nacionalnih politik njenih držav članic (prim. Dwyer, Papadimitriou 2006: 1316). Omenjene ugotovitve sprožajo kar nekaj vprašanj, povezanih s staranjem migrantov in migrantk, ki bodo vedno bolj aktualna tudi v Sloveniji, ki je bila doslej med prebivalstvenimi strokovnjaki in v javnosti obravnavana predvsem kot t. i. nova država priseljevanja. Z izjemo raziskave Alenke Kobolt (2002), ki je v okviru mednarodnega projekta o staranju migrantov in migrantk proučevala izkušnje starejših priseljencev iz Bosne in Hercegovine v Sloveniji, v slovenskem prostoru namreč še niso bile opravljene podrobnejše raziskave položaja starejših migrantov in tem, povezanih z njihovo starostjo in upokojitvijo. Povedna je ugotovitev Alenke Kobolt (2002: 149), da predstavniki večine organizacij, ki izvajajo dejavnosti za starejše ljudi v Sloveniji, le ugibajo, da imajo med svojimi člani in uporabniki tudi kakšnega priseljenega iz republik nekdanje Jugoslavije. Alenka Kobolt (2002: 149) sklene, da je »priseljenost iz ostalih republik nekdanje skupne države pravno in tudi družbeno doživljana kot manj prepoznavno dejstvo«. V okviru mednarodnega projekta FEMAGE – Needs for female immigrants and their integration in ageing societies (Potrebe po migrantkah in njihova integracija v starajočih družbah) smo raziskovalke v enem izmed tematskih sklopov analizirale tudi pričakovanja migrantk v Sloveniji za starost in implikacije staranja migrantk za politiko (Cukut 2008; Knežević Hočevar idr. 2009). Pokazalo se je, da sedanji položaj migrantk na trgu delovne sile pomembno določa njihove z upokojitvijo povezane pravice. Prisilnim priseljenkam iz Bosne in Hercegovine se leta nezakonitega dela, ki so ga opravljale zlasti v letih 1992–2002, ko zaradi statusa osebe z začasnim zatočiščem niso smele zakonito delati več kot osem ur tedensko, ne štejejo v pokojninsko dobo. Posebej je bila poudarjena težava neurejenih bilateralnih pokojninskih sporazumov med Slovenijo in državami, iz katerih so prihajale migrantke. Povedno je nemara tudi dejstvo, da vladna *Strategija varstva starejših do leta 2010 – solidarnost, sožitje in kakovostno staranje prebivalstva* (2012) posebej ne omenja starejših migrantov in/ali pripadnikov manjšinskih etničnih skupin. Toda zaradi procesov staranja prebivalstva in vedno večjega pomena mednarodnih migracij bo staranje migrantov in migrantk nedvomno postalo eden izmed bolj pomembnih »izzivov« za oblikovanje migracijskih in socialnih politik tudi v Sloveniji.

Zdi se, da je starejše prebivalstvo vedno bolj tarča javnega diskurza o pretirani porabi proračunskih sredstev (na primer za pokojninsko in zdravstveno varstvo), in to ne glede na njihovo »etnično pripadnost«. Gre celo za večkratno diskriminacijo starejših migrantov in migrantk, ki so v državah, v katere so se preselili, še vedno obravnavani zlasti kot migranti in/ali tujci, ne glede na to, da so številni v ome-

²¹ Skladno z načelom subsidiarnosti je Evropska unija na področjih, ki niso v njeni izključni pristojnosti, pristojna ukrepati le, če države članice ne morejo zadovoljivo doseči zasledovanih ciljev (Pristojnosti 2012).

njenih državah že pridobili državljanstvo in naj bi jim pripadale enake socialne, ekonomske in politične pravice kot »domačemu prebivalstvu«. Kot nas namreč nekoliko ironično opozarjata Dwyer in Papadimitriou (2006: 1316): v Evropski uniji, v kateri države članice iščejo načine, kako bi državljanom vedno bolj omejile pravice (na primer iz naslova socialne varnosti), ni presenetljivo, da še v večji meri omejujejo oziroma spregledujejo pravice migrantov in migrantk, ki jih razumejo predvsem kot »outsiderje«, potencialno grožnja nacionalni varnosti in/ali kot možne uporabnike omejenih proračunskih sredstev za zagotavljanje blaginje. Nemara je zato ena od temeljnih težav pri doseganju bolj vključujočega odnosa do migrantov in migrantk prav dejstvo, da je »področje razprav o demografiji nacionalnega prebivalstva še vedno pretežno utemeljeno v esencialističnih predstavah kolektivnega članstva in ne v razlagah, ki se od njih oddaljujejo« (Knežević Hočevar 2011: 19).

LITERATURA

- Bailey, Adrian, Boyle, Paul (2004). Untying and Retying Family Migration in the New Europe. *Journal of Ethnic and Migration Studies* 30/2, 229–241.
- Baldassar, Loretta (2007a). Transnational Families and Aged Care: The Mobility of Care and the Migrancy of Ageing. *Journal of Ethnic and Migration Studies* 33/2, 275–297.
- Baldassar, Loretta (2007b). Transnational Families and the Provision of Moral and Emotional Support: The Relationship between Truth and Distance. *Identities: Global Studies in Culture and Power* 14/4, 385–409.
- Baldassar, Loretta, Vellekoop Baldock, Cora, Wilding, Raelene (2007). *Families Caring across Borders Migration, Ageing and Transnational Caregiving*. Hampshire, New York: Palgrave Macmillan.
- Bolzmann, Claudio, Fibbi, Rosita, Vial, Marie (2006). What to do after Retirement? Elderly Migrants and the Question of Return. *Journal of Ethnic and Migration Studies* 32/8, 1359–1375.
- Božić, Saša (2006). The Achievement and Potential of International Retirement Migration: The Need for Disciplinary Exchange. *Journal of Ethnic and Migration Studies* 32/8, 1415–1427.
- Brockmann, Michaela, Fisher, Mike (2001). Older Migrants and Social Care in Austria. *Journal of European Social Policy* 11/4, 353–362.
- Bryceson, Deborah, Vuorela, Ulla (ur.) (2002). *The Transnational Family: New European Frontiers and Global Networks*. Oxford, New York: Berg.
- Bryceson, Deborah (2002). Europe's Transnational Families and Migration: Past and Present. *The Transnational Family: New European Frontiers and Global Networks* (ur. Deborah Bryceson, Ulla Vuorela). Oxford, New York: Berg, 31–59.
- Cukut, Sanja (2008). Migracije in staranje – migrantke v Sloveniji. *Kakovostna starost* 11/3, 4–14.
- Dwyer, Peter, Papadimitriou, Dimitris (2006). The Social Security Rights of Older International Migrants in the European Union. *Journal of Ethnic and Migration Studies* 32/8, 1301–1319.
- Evergeti, Venetia (2006). Living and Caring between Two Cultures: Narratives of Greek Women in Britain. *Community, Work and Family* 9/3, 347–366.
- Green Paper »Confronting Demographic Change: A new Solidarity between the Generations.« Brussels: Commission of the European Communities (2012), <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2005:0094:FIN:EN:DOC> (1. 7. 2012).*
- Grewal, Ini, Nazroo, James, Bajekal, Madhavi, Blane, David, Lewis, Jane (2004). Influences on Quality of Life: A Qualitative Investigation of Ethnic Differences among Older People in England. *Journal of Ethnic and Migration Studies* 30/4, 737–761.
- Izuhara, Misa, Shibata, Hiroshi (2001). Migration and Old Age: Japanese Women Growing Older in British Society. *Journal of Comparative Family Studies* 32/4, 571–586.
- King, Russell, Patterson, Guy (1998). Diverse Paths: The Elderly British in Tuscany. *International Journal of Population Geography* 4/2, 157–182.

- King, Russell, Warnes, Anthony M., Williams, Allan M. (1998). International Retirement Migration in Europe. *International Journal of Population Geography* 4/2, 91–111.
- King, Russell, Warnes, Anthony M., Williams Allan M. (2000). *Sunset Lives: British Retirement Migration to the Mediterranean*. Oxford: Berg.
- King, Russell (2002). Towards a New Map of European Migration. *International Journal of Population Geography* 8/2, 89–106.
- Knežević Hočevar, Duška (2006). Rodnost, etničnost in nacija: Razmisleki o preučevanju demografskih značilnosti nacionalnih populacij. *Razprave in gradivo* 50-51, 184–210.
- Knežević Hočevar, Duška (2011). Obrazi migracij v govoru o rodnosti. *Dve domovini/Two Homelands* 33, 7–22.
- Knežević Hočevar, Duška, Cukut, Sanja, Černič Istenič, Majda (2009). Intercultural Dialogue between Lip Service and Practice. *Dve domovini/Two Homelands* 30, 29–49.
- Kobolt, Alenka (2002). *Zdej smo od tu – A smo še čefurji*. Ljubljana: i2.
- Leavey, Gerard, Sembhi, Sati, Livingston, Gill (2004). Older Irish Migrants Living in London: Identity, Loss and Return. *Journal of Ethnic and Migration Studies* 30/4, 763–779.
- Longino, Charles F., Perzynski, Adam T., Stoller, Eleanor P. (2002). Pandora's Briefcase: Unpacking the Retirement Migration Decision. *Research on Aging* 24/1, 29–49.
- Milić, Andjelka, Milošević, Dragoslav (ur.) (2011). *Zbornik stručnih saopštenja i postera sa osmog nacionalnog Gerontološkog kongresa »Za evropske standarde socijalne sigurnosti i kvaliteta života u starosti«*. Beograd: Gerontološko društvo Srbije.
- Oliver, Caroline (2002). Killing the Golden Goose? Debates about Tradition in an Andalucían Village. *Journal of Mediterranean Studies* 12/1, 169–190.
- Oliver, Caroline (2007). *Retirement Migration. Paradoxes of Aging*. New York: Routledge.
- Oliver, Caroline, O'Reilly, Karen (2010). A Bourdieusian Analysis of Class and Migration: Habitus and the Individualizing Process. *Sociology* 44/1, 49–66.
- O'Reilly, Karen (2000). *The British on the Costa Del Sol*. London: Routledge.
- O'Reilly, Karen (2003). When is a Tourist?: The Articulation of Tourism and Migration in Spain's Costa del Sol. *Tourist Studies* 3/3, 301–317.
- O'Reilly, Karen (2007). Intra-European Migration and the Mobility-Enclosure Dialectic. *Sociology* 41/2, 277–293.
- Palo, Stoller, Eleanor, Miller, Baila, Guo, Shenyang (2001). Shared Ethnicity and Relationship Multiplexity Within the Informal Networks of Retired European American Sunbelt Migrants: A Case Study. *Research on Aging* 23/3, 304–325.
- Parreñas Salazar, Rachel (2001). *Servants of Globalisation. Women, Migration and Domestic Work*. Stanford: Stanford University Press.
- Patterson, Fiona M. (2004). Policy and Practice Implications from the Lives of Aging International Migrant Women. *International Social Work* 47/1, 25–37.
- Predojević-Despić, Jelena (2011). Medjunarodne migracije starih – potreba za društvenom akcijom. *Zbornik stručnih saopštenja i postera sa osmog nacionalnog Gerontološkog kongresa »Za evropske standarde socijalne sigurnosti i kvaliteta života u starosti«* (ur. Andjelka Milić, Dragoslav Milošević). Beograd: Gerontološko društvo Srbije, 52–61.
- Pristojnosti* (2012), <http://www.evropa.gov.si/si/pristojnosti/> (20. 7. 2012).
- Rodríguez, Vicente, Fernández-Mayoralas, Rojo, Fermína (1998). European Retirees on the Costa del Sol: A Cross-National Comparison. *International Journal of Population Geography* 4/2, 183–200.
- Ruspini, Paolo (2009). *Elderly Migrants in Europe: An Overview of Trends, Policies and Practices*, http://www.cermes.info/upload/docs/Elderly_migrants_in_Europe_paolo_ruspini_14_07_10.pdf (3. 6. 2013).
- Saraceno, Chiara (2010). Social Inequalities in Facing Old-Age Dependency: A Bi-Generational Perspective. *Journal of European Social Policy* 20/1, 32–44.
- Silk, John (1998). Caring at a Distance. *Ethics, Place and Environment* 1/2, 165–182.

- Strategija varstva starejših do leta 2010 – solidarnost, sožitje in kakovostno staranje prebivalstva (2012), http://www.mddsz.gov.si/fileadmin/mddsz.gov.si/pageuploads/dokumenti__pdf/strategija_varstva_starejsih_splet_041006.pdf (25. 7. 2012).
- Vah, Mojca, Lukšič-Hacin, Marina (2008). Contemporary Implications of Multiculturalism Policies for European Welfare States. *Dve domovini/Two Homelands* 28, 7–21.
- Vellekoop Baldock, Cora (2000). Migrants and Their Parents: Caregiving from a Distance. *Journal of Family Issues* 21/2, 205–224.
- Walters, William H. (2002). Later-Life Migration in the United States: A Review of Recent Research. *Journal of Planning Literature* 17/1, 37–66.
- Warnes, Anthony M., Patterson, G. (1998). British Retirees in Malta: Components of the Cross-National Relationship. *International Journal of Population Geography* 4/2, 113–133.
- Warnes, Anthony M., Friedrich, Klaus, Kellaheer, Leonie, Torres, Sandra (2004). The Diversity and Welfare of Older Migrants in Europe. *Ageing and Society* 24/3, 307–326.
- Warnes, Anthony M., Williams, Allan (2006). Older Migrants in Europe: A New Focus for Migration Studies. *Journal of Ethnic and Migration Studies* 32/8, 1257–1281.
- White, Paul (2006). Migrant Populations Approaching Old Age: Prospects in Europe. *Journal of Ethnic and Migration Studies* 32/8, 1283–1300.
- Widding Isaksen, Lise, Uma Devi, Sambasivan, Russell Hochschild, Arlie (2008). Global Care Crisis: A problem of Capital, Care Chain, or Commons. *American Behavioral Scientist* 52/3, 405–425.
- Wilding, Raelene (2006). »Virtual« intimacies? Families Communicating across Transnational Contexts. *Global Networks* 6/2, 125–142.
- Williams, Allan M., Patterson, Guy (1998). »An Empire Lost, but a Province Gained«: A Cohort Analysis of British International Retirement in the Algarve. *International Journal of Population Geography* 4/2, 135–155.
- Wray, Sharon (2003). Women Growing Older: Agency, Ethnicity and Culture. *Sociology* 37/3, 511–527.
- Zavratnik, Simona (2011). Sodobne migracije v mnenjih slovenske javnosti. *Dve domovini/Two Homelands* 33, 55–71.
- Zechner, Minna (2008). Care of Older Persons in Transnational Settings. *Journal of Aging Studies* 22/1, 32–44.
- Zontini, Elisabetta (2006). Italian Families and Social Capital: Care Provision in a Transnational World. *Community, Work and Family* 9/3, 325–345.

PODNEBNE SELITVE V OKRAJU SHYAMNAGAR V BANGLADEŠU

Jurij KOČAR¹

COBISS 1.01

IZVLEČEK

Podnebne selitve v okraju Shyamnagar v Bangladešu

Članek obravnava selitve, ki jih povzročajo posledice podnebnih sprememb. Vsebuje rezultate raziskave, ki je potekala v okraju Shyamnagar v Bangladešu med prebivalci vasi, ki so najbolj občutljive na podnebne spremembe. Izbrano regijo pestijo številni okoljski problemi, ki silijo prebivalce v selitev. Pri tem se zastavlja ključno vprašanje, kakšno vlogo pri tem igrajo posledice podnebnih sprememb. Razen v primeru naravnih nesreč je ta le obrobna, saj gospodarski selitveni dejavniki prevladujejo nad okoljskimi. Verjetnost množičnega izseljevanja podnebnih migrantov iz Bangladeša je za zdaj majhna.

KLJUČNE BESEDE: geografija, selitve, podnebne spremembe, tropski ciklon, Bangladeš

ABSTRACT

Climate Migration in the Shyamnagar Sub-district in Bangladesh

The article focuses on migration caused by climate change. It contains the results of a survey conducted in the Shyamnagar Sub-district in Bangladesh among the people of the villages, who are the most vulnerable to climate change. The selected region is under the threat of numerous environmental problems that force people to migrate. The key question is what role climate change plays in this issue. Except in the case of natural disasters, it is only marginal, because economic migration factors normally predominate over environmental ones. The probability of an exodus of climate migrants from Bangladesh is currently negligible.

KEY WORDS: geography, migration, climate change, cyclone, Bangladesh

UVOD

Bangladeš skoraj v celoti leži na območju delte rek Gangesa in Bramaputre. Območje je rodovitno in gosto poseljeno. »Pritisk na naravne vire je izreden in ravnovesje v okolju je na meji vzdržnosti« (Rafik, Shamsuddin 2011). K težavam dodatno pripomorejo podnebne spremembe. Potrebna je le manjša močnja, kot je tropski ciklon, in ravnovesje v okolju se poruši. Posledice na okoljsko zelo ranljivih območjih so lahko za tamkajšnje prebivalce katastrofalne. Poleg številnih smrtnih žrtev je ključni problem poslabšanje stanja ali celo trajna izguba bivalnega okolja. »Če ni takojšnje in zadovoljive pomoči, in tako je v večini primerov, se v prvih mesecih po naravni nesreči na prizadetem območju pojavi množično

¹ Univ. dipl. geograf in profesor zgodovine; Biotehniški izobraževalni center, lžanska cesta 10, SI-1000 Ljubljana; jurij.kocar@bic-lj.si.

razseljevanje kot najbolj očitna oblika selitev zaradi podnebnih dejavnikov. Prvemu valu selitev sledi val gospodarskih izseljencev, ki iščejo boljše možnosti za preživetje» (Mehedi 2010). Članek pojasnjuje smotrnost uporabe pojma »podnebne selitve«, razmerje med gospodarskimi in okoljskimi oziroma podnebnimi selitvenimi dejavniki ter razpravlja o drugih dilemah v zvezi s podnebnimi selitvami znotraj ruralno-urbanih selitvenih tokov v okraju Shyamnagar na območju jugozahodnega obalnega dela Bangladeša.

METODOLOGIJA

Raziskava je potekala kot del širšega proučevanja podnebnih selitev v okviru doktorske disertacije. Ocenil sem, da se lahko do bolj verodostojnih rezultatov dokopljem na podlagi terenskega dela v eni od najbolj ranljivih regij sveta. Izbral sem Bangladeš, ki se v strokovni literaturi pogosto navaja kot »območje, kjer se podnebne selitve že dogajajo« (Black idr. 2008: 27–36).

Terensko delo je potekalo v letu 2012. Stabilnost okolja različnih delov Bangladeša ogrožajo različne posledice podnebnih sprememb. Jugozahodni obalni del, v katerem je tudi okraj Shyamnagar, najbolj ogroža dviganje morske gladine. Na podlagi predhodnih raziskav je bilo upoštevano, da lahko podnebne selitve povzročijo le ekstremen vremenski pojav. V primeru okraja Shyamanagar je to uničujoč tropski ciklon. »Zadnji, z imenom Aila, je leta 2009 prizadel širšo okolico mangrovskega gozda Sundarban in še najbolj okraj Shyamnagar na skrajnem jugozahodu Bangladeša« (Mehedi 2010). Zato smo s strokovnimi sodelavci iz nevladne organizacije Karitas Bangladeš s sedežem v Daki za raziskavo izbrali prav to območje.

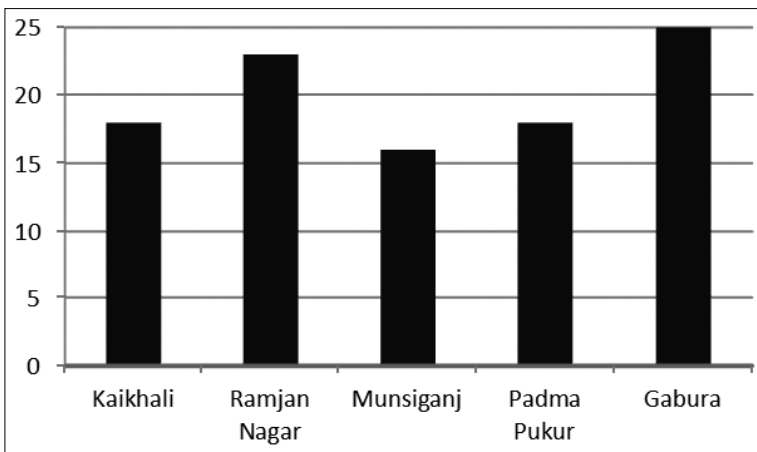


Fotografija 1: Zahtevno terensko delo je bilo timsko, saj so ogrožene vasi težko dostopne in sicer gostoljubni prebivalci govorijo le bengalsko (avtor: Jurij Kočar).

Ob logistični in precejšnji strokovni podpori sodelavcev omenjene organizacije smo sestavili delovni tim, ki so ga poleg mene sestavljali še trije uslužbenci Karitasovega centra v Shyamnagarju in študent Univerze v Khulni. Deset dni smo opravljali terensko delo med prebivalci najbolj ranljivih in med Ailo najbolj prizadetih vasi. V tem času smo z motorji in s čolni prevozili več kot 800 km.

Anketiranje je potekalo v naseljih East Kaikhali v občini Kaikhali, Golakhali in Kalinchikoloni v občini Ramjan Nagar, South Kadamtala in Mathurapur v občini Munshiganj, Khutikata, Chuibarua in Karitaspara v občini Padma Pukur ter Lebuluria in Gainbari v občini Gabura, ki so v okraju Shyamnagar najbolj občutljive na podnebne spremembe. Omenjena naselja namreč ležijo v neposredni bližini rečnih rokavov, na najbolj izpostavljenih predelih, kot so nasipi in aluvialne terase. Slednje so v depresiji, saj rečni rokavi tečejo po izgonu. Ob monsunskem deževju voda v rokavih naraste in resno ogroža omenjene vasi, v še večji nevarnosti pa so v primeru pojava tropskega ciklona.

Hkrati smo intervjuvali izbrane prebivalce in fotografirali stanje v okolju. Prebivalci omenjenih vasi so zelo revni, ne glede na to, ali pripadajo muslimanski večini ali hinduistični manjšini. Del slednje je tudi ljudstvo Munda, pri katerem so prisotni tudi ostanki animizma (Munda 2008). Pri raziskavi so bile občine in naselja izbrani enakomerno.

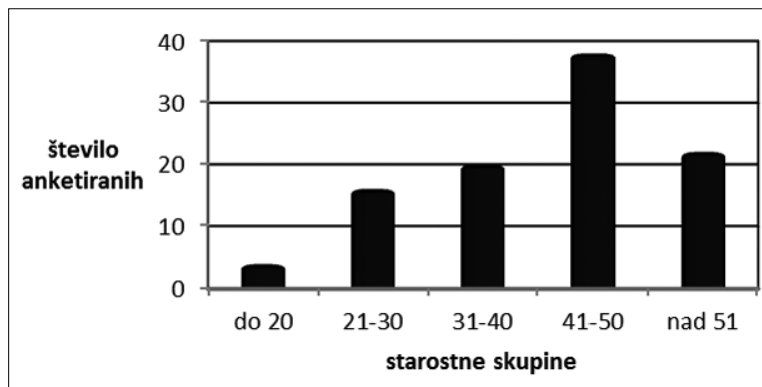


Graf 1: Število anketirancev glede na občino in kraj bivanja (avtor: Jurij Kočar)

Vsa v raziskavo zajeta naselja so bila med Ailo popolnoma uničena. Po Aili so večino vasi obnovili, vendar so mnoge preoblikovali tako, da so hiše postavili na varnejša mesta. Kljub temu omenjene vasi in zaselki ostajajo najbolj ranljiva naselja v okraju Shyamnagar in jih lahko v prihodnosti tropski ciklon znova prizadene. Ker so prebivalci marginalnih naselij izseljevanju naklonjeni, obstaja velika verjetnost razvoja podnebnih selitev.

V vzorec smo zajeli 100 polnoletnih oseb. Prebivalstvo je bilo za anketiranje motivirano, kar je olajšalo terensko delo. Med prebivalstvom bangladeškega podeželja, zlasti pri muslimanski večini, prevladujejo patriarhalni odnosi, zato je dostopnost do žensk omejena in je bilo v vzorcu kar 80 odstotkov moških. Ti so bili veliko bolj pripravljeni sodelovati, a smo kljub temu vložili precej truda, da so na anketiranje pristale tudi ženske. Tudi starostna sestava anketirancev ni bila najugodnejša, saj »gre nagnjenost k selitvam bolj pričakovati pri mlajših prebivalcih« (Mortreux, Barnett 2009). Največkrat so odgovarjali gospodarji družin, zato je bilo kar 60 odstotkov anketirancev starejših od 40 let. Družinski člani so močno povezani in se o pomembnih stvareh posvetujejo, zato mnenje gospodarja večinoma odraža tudi mnenje in prihodnje odločitve preostalih družinskih članov. To velja tudi za odločitve za selitev mlajših moških družinskih članov.

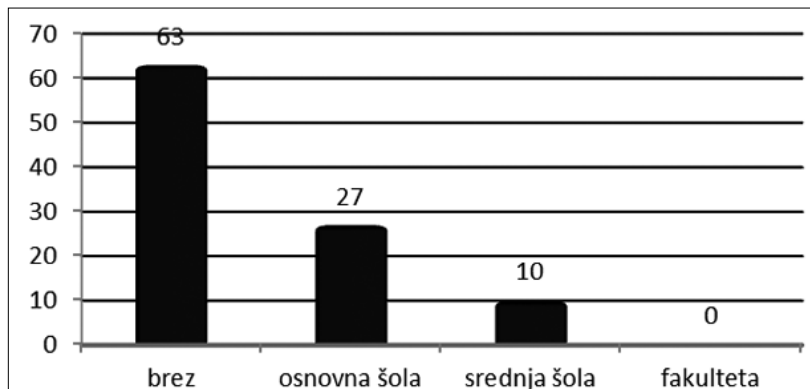
V življenju prebivalcev bangladeškega podeželja igra družina pomembno vlogo. Kar 94 odstotkov anketirancev je bilo poročenih, drugi so bili samski ali ovdoveli. Za družine revnih skupnosti, ki so rela-



Graf 2: Starostna sestava anketirancev (avtor: Jurij Kočar)

tivno velike, je značilno, da »ob finančnih stiskah pošljejo v mesto ali celo v tujino mlajšega moškega člana, da služi in pošilja domov del svojega zaslužka ter se po krizi običajno vrne domov« (Afsar 2000; Brown 2008: 22). Med prebivalci okraja Shyamnagar opravljene intervjuje so pokazali, da so takšne oblike zdomstva prisotne tudi v Bangladešu. Prebivalci okraja Shyamnagar so v glavnem potomci priseljencev. Kolonizacija je potekala zadnjih dvesto let in se je umirila šele pred nekaj desetletji, zato je »za prebivalce značilna velika mobilnost« (Munda 2008). Poleg tega večina nima lastne zemlje, njihovi stanovanjski objekti pa so skromni in preprosti, kar ugodno vpliva na mobilnost.

Izobrazbena sestava anketirancev kaže na marginalni položaj skupnosti v odnosu do preostalih prebivalcev Bangladeša. Brez kakršne koli izobrazbe je bilo kar 63 odstotkov anketirancev, 27 odstotkov jih je končalo osnovno šolo, le desetina srednjo šolo, medtem ko višje in visoke izobrazbe ni imel nihče. Izrazito slabo izobrazbeno sestavo je imela skupnost ljudstva Munda, ki »je najbolj revno, zapostavljeno in ranljivo na spremembe v okolju« (Munda 2008).



Graf 3: Izobrazbena sestava anketirancev (avtor: Jurij Kočar)

Zanimiv je tudi podatek o številu otrok v družini anketiranca. Otroke je imelo kar 92 odstotkov anketirancev. Največ, torej slaba tretjina, je imela enega, 28 odstotkov dva, slaba tretjina tri ali več otrok, desetina pa pet ali več. Tudi ti podatki kažejo na močno vlogo družine v življenju skupnosti.

Zadnji podatek o skupini anketirancev je višina celoletnega družinskega dohodka. Ta je pričakovano zelo nizka in v povprečju znaša dobrih 300 EUR. Manj kot 300 EUR zasluži 41 odstotkov družin, v dveh družinah je letni dohodek celo nižji od 200 EUR. Z dohodkom med 300 in 400 EUR razpolaga 49 odstotkov družin anketirancev in le 5 odstotkov jih zasluži več. Večina družin torej preživi z manj kot enim evrom na dan, kar je dober indikator revščine.

V raziskavo zajeta populacija je bila kljub precejšnjim kulturnim in verskim razlikam v veliki meri socialno homogena. Anketiranci so pripadali patriarhalni skupnosti revnih in neizobraženih kmečkih delavcev.

Glavni cilj raziskave je bil proučiti značilnosti razvitih ruralno-urbanih selitvenih tokov oziroma pomen okoljskih (podnebnih) selitvenih dejavnikov v njih. Raziskava v okraju Shyamnagar je imela namen pretehtati naslednji hipotezi:

- a) Znotraj obstoječih selitvenih tokov prevladujejo podnebne selitve.
- b) Notranje podnebne selitve bodo kmalu prerasle v množične mednarodne selitve.

Za doseg cilja je bilo treba temeljito proučiti pomen posameznih selitvenih dejavnikov, s poudarkom na podnebnih.

TERMINOLOŠKE DILEME IN RAZPRAVA O OBSTOJU PODNEBNIH SELITEV

Problematika podnebnih selitev je relativno nova, zato ohranja številna odprta terminološka vprašanja. Za raziskovalce je postala bolj zanimiva šele po objavi četrtega poročila Medvladnega foruma o podnebnih spremembah (IPCC) leta 2007. Da bodo podnebne selitve v prihodnosti vse večji mednarodni problem, kaže tudi napoved IPCC-ja, da »bo do leta 2050 na svetu že 200 milijonov podnebnih migrantov« (Brown 2008: 11; IPCC-AR4 2007). »Pri definiranju pojmov v zvezi s pojavom podnebnih selitev obstajajo številne terminološke dileme, ki izhajajo tudi iz političnih predsodkov« (Brown 2008).

Oli Brown (2008) daje terminološkemu vprašanju velik pomen in meni, da je bil prvi, ki je opozoril na naraščajoč problem okoljskih beguncev, Janos Bogardi, direktor okoljskega inštituta v okviru OZN. Njegov predlog o razširitvi pojma »begunec« ni bil podprt. Konvencija OZN iz leta 1951 in Protokol iz leta 1967, ki obravnavata status begunca, podnebnih migrantov ne vključujeta. Uradna definicija pojma »begunec« temelji na zelo ozki razlagi in ga označuje kot »osebo, ki je zunaj svoje države ali življenjskega prostora in se ne more vrniti domov zaradi strahu pred preganjanjem«. Pojem »podnebni begunci« pogosteje uporabljajo raziskovalci iz okoljsko bolj ranljivih držav v razvoju, ki pritiskajo na razvite države, da priznajo status begunca tudi podnebnim razseljencem in zanje poskrbijo v skladu z mednarodnimi standardi, ki veljajo za politične begunce. Z nasprotne strani obstajajo pomisleki, saj se razvite države otepajo svoje odgovornosti do žrtev posledic podnebnih sprememb. Torej se pri uveljavljanju katerega koli pojma ne da izogniti političnim pritiskom, zato je okrog tega vprašanja še vedno veliko nedorečenosti (Brown 2008: 13–15, 36–37).

O terminoloških dilemah razpravlja tudi Hasan Mehedi (2010). Meni, da se v literaturi pojavlja veliko med seboj podobnih izrazov, kot so »prisilni okoljski migranti«, »okoljsko motivirani migranti«, »podnebni begunci«, »podnebni/klimatski migranti«, »klimigranti«, »okoljski razseljenci«, »ekobegunci«, »ekološki razseljenci« in podobno. Med njimi ni avtoritativnega pojma ali soglasja, med omenjenimi pojmi pa je kar nekaj razlik. Kljub temu so številne ugledne mednarodne organizacije, kot je UNHCR, sprejele pojem »podnebni razseljenci (Climate Induced Displaced People)« (Mehedi 2010: 2).

Ob naravnih nesrečah se žrtve preselijo v različne kraje, nesreče torej spremlja razseljevanje. Pojem »podnebni razseljenci« zato nosi v sebi dodatno informacijo, medtem ko je pojem »izseljenci« ne.

V primeru okoljskih selitev, v katerih prevladujejo dejavniki podnebnih sprememb, govorimo o podnebnih selitvah. »Pojem »okoljske selitve« obsega skupino selitev, ki jih povzročajo motnje v okolju. Znotraj geografskega okolja je podnebje le eden od dejavnikov, zato lahko o podnebnih selitvah govorimo le v primeru, da podnebje prevlada nad preostalimi selitvenimi dejavniki« (Brown 2008: 16–20). Podnebni selitveni dejavniki niso prisotni le ob naravnih nesrečah, ampak tudi ob relativno stabilnem stanju okolja. Zato obstaja možnost, da se, sicer v manjšem številu, ampak konstantno, za podnebne selitve odločajo tudi ljudje, ki niso neposredno prizadeti zaradi ekstremnih vremenskih pojavov, temveč

jih k selitvi motivira strah pred nepredvidljivimi posledicami podnebnih sprememb v prihodnosti. Pojem »podnebni razseljenci« je zato smiselno razširiti v pojem »podnebni migranti«. »Mednarodna organizacija za migracije (IOM) podobno uporablja izraz »okoljski migranti« (Brown 2008: 15).

Podnebje je sestavni del širšega geografskega okolja, torej je le eden od interakcijskih dejavnikov v okolju. V relativno stabilnem okolju vpliva na potencialnega migranta veliko različnih selitvenih dejavnikov. Kadar med njimi prevlada podnebni selitveni dejavnik, lahko govorimo o podnebnih migrantih. To je najbolj očitno v primeru naravnih nesreč, ki jih povzročajo ekstremni vremenski pojavi. Slednji porušijo ravnovesje v okolju in žrtve nimajo več možnosti zadovoljevati svojih osnovnih potreb po naravnih virih. V okraju Shyamnagar je ključni potisni selitveni dejavnik uničujoči tropski ciklon, katerega pojavnost težko pripišemo podnebnim spremembam, a hkrati tega ne moremo izključiti. »Opazovanja v zadnjih petdesetih letih so namreč pokazala, da se silovitost in pogostost tropskih ciklonov na območju Bengalskega zaliva ne povečujeta« (Ahmed, Shamsuddin 2011: 63–75). »Obstoječi selitveni tokovi v Bangladešu so odraz družbeno-gospodarskega neravnovesja v državi, katerega rezultat so množične ruralno-urbane selitve« (Afsar 2000). Pri prepoznavanju podnebnih selitev znotraj omenjenih selitvenih tokov je ključno upoštevanje okoljskih selitvenih dejavnikov odbijanja, ki so povezani s podnebnimi spremembami. V primeru, da bi ti prevladovali, bi bila uporaba pojma »okoljski migranti« smiselna.

Ključni motivacijski element vseh živih bitij je težnja po preživetju. Zelo revno prebivalstvo se preživlja z ekstenzivnim kmetijstvom in je v veliki meri odvisno od stanja v okolju. Ob ekstremnih vremenskih pojavih stanje bivalnega okolja preseže kritični prag in prebivalci si v njem ne morejo zagotoviti osnovnih naravnih virov, kot sta pitna voda in hrana. V primeru, da prilagoditveni ukrepi niso zadovoljivi, si morajo prebivalci vsaj začasno poiskati novo bivalno okolje. »Po stabilizaciji razmer so se večinoma pripravljene vrtni, ker so prilagojeni na svoje izvirno okolje« (Mehedi 2010). Če je njihov življenjski prostor trajno izgubljen, se morajo prilagoditi novemu okolju, »kar povzroča številne probleme, kot so stres in konflikti« (Klinar 1985). »Ker se sčasoma večina površin prizadetega območja po nesreči revitalizira, prevladujejočasne podnebne selitve« (Mehedi 2010). Na občasno prizadetem območju je v resnici število okoljskih razseljencev v primerjavi s številom gospodarskih izseljencev zelo majhno. Kljub veliki ranljivosti okolja v Bangladešu so podnebni selitveni dejavniki v senci gospodarskih. K razvoju tako enih kot drugih pripomore agrarna prenaseljenost podeželja. Večina ruralno-urbanih selitev ima gospodarski motiv in morebitni migranti so ob naravni nesreči le še dodatno motivirani. Želja po boljšem zaslužku obstaja že prej in ob ekstremnih vremenskih pojavih samo dozori v dokončno odločitev.

Stanje podeželja v Bangladešu lahko primerjamo s stanjem slovenskega podeželja med industrijsko revolucijo. Tudi na Slovenskem so bili močni selitveni tokovi s prenaseljenega podeželja v bližnja mesta in bolj oddaljena industrijska središča. »Slovensko podeželje so pestile številne naravne nesreče, kot so različne bolezni vinske trte ter hladna in deževna poletja, ki so pospeševala izseljevanje obubožanih kmetov« (Klemenčič 2009; Zwitter 2012). »Podobne žrtve so bili tudi izseljenci z dalmatinskih otokov zaradi degradacije okolja in irski kmetje zaradi krompirjeve plesni« (Klemenčič 2007). Dejansko so bili v teh primerih okoljski problemi bolj povod kot vzrok pri odločitvah za selitev, zato je pri obravnavi teh selitev okoljski vidik podrejen gospodarskemu. Pri tem se postavlja vprašanje, ali ni tako tudi v primeru Bangladeša.

Ena ključnih posledic globalnega segrevanja, ki lahko ogrozi obstoj ogromnih poseljenih območij, je dviganje morske gladine. »Nizke obale, kot so rečne delte, atoli, mangrovski gozdovi, marše in estuariji, so podvrženi hitremu preobražanju in dolgoročnemu izginjanju« (IPCC-AR4 2007). Prebivalstvo prizadetih območij se lahko nekaj časa prilagaja z različnimi prilagoditvenimi ukrepi, kot so: gradnja nasipov, preusmerjanje kmetijske proizvodnje na odpornejše kulture, gradnja protipoplavnih zatočišč in podobno. Ključni trenutek, ki preseka ustaljeno prakso, je ekstremni naravni pojav. Ko gre za fizično izgubo življenjskega prostora, »je razselitev edini možni prilagoditveni ukrep, ki v bistvu to sploh ni, ampak je, z antropocentričnega vidika, vdaja človeka v boju z naravo« (Mortreux, Barnett 2009). V takšnih primerih podnebno motiviranih selitev ne moremo prezreti. In vendar, ali so podnebne selitve na najbolj ranljivih območjih splošno razširjen pojav?

V primeru atolskih držav, kakršna je Tuvalu, bodo verjetno podnebne selitve neizbežne, saj v primeru dviga morske gladine za meter ali več do konca stoletja realnih alternativnih rešitev ni. »Trenutno podnebnih selitev na Tuvaluju še ni oziroma se za njimi skrivajo gospodarski vzroki« (Mortreux, Barnett 2009). Torej gre v primeru podnebnih selitev v Oceaniji za oddaljeno prihodnost, poleg tega »je tam število prebivalcev tako majhno, da je problem z globalnega vidika zanemarljiv« (Kočar 2012). Povsem drugače je z gosto poseljenimi rečnimi deltami Gangesa in Bramaputre, Nila, Mekonga ter Jangcekganga. Prebivalci obalnega območja Bangladeša so povprečno revnejši in manj izobraženi od prebivalcev Oceanije, kar zmanjšuje njihovo prilagoditveno zmogljivost, a imajo po drugi strani večje možnosti za razvoj notranjih selitev.

RANLJIVOST OKOLJA V OKRAJU SHYAMNAGAR

»Bangladeš velja za eno od območij, najbolj ranljivih na dejavnike, ki jih sprožajo podnebne spremembe« (Black idr. 2008: 27; Brown 2008: 27–36), in je »ena najgosteje poseljenih držav na svetu, na številnih predelih agrarno prenaseljena« (Afsar 2000). Ravnovesje v okolju je šibko in se v primeru ekstremnega vremenskega pojava poruši. V okraju Shyamnagar prevladuje revno neizobraženo podeželsko prebivalstvo s slabo razvitimi socialnimi mrežami, ki se v povprečju ne zna preživljati z neagrarnimi dejavnostmi, kar je velika intervencijska ovira na poti do odločitve za selitev. Po drugi strani jih številni potisni selitveni dejavniki okolja silijo prav v to. »Vseeno je zanje življenje v velemestu izredno stresno in se mu mnogi izogibajo« (Mehedi 2010).

Ob podpori državnih in nevladnih organizacij se podnebne selitve lahko omejijo, saj »so v primeru tropskega ciklona ključni prvi tedni po nesreči. Razmere se pozneje, ko se v okolju začne vzpostavljati



Fotografija 2: Protipoplavno zatočišče, kakršne na ogroženih območjih gradijo nevladne organizacije v sklopu mednarodnih projektov za krepitev prilagoditvene zmogljivosti. Stavba, v kateri je osnovna šola, ob poplavih dobi vlogo zatočišča (avtor: Jurij Kočar).

novo ravnovesje, umirijo» (Mehedi 2010). Če širše družbeno okolje poskrbi za urejena zatočišča, začasno nastanitev in zagotovi osnovne vire preživetja, se da prisilnim podnebnim selitvam v glavnem izogniti, oziroma se s temi ukrepi omogoči proces remigracije. Vlada in številne nevladne humanitarne organizacije, prisotne na ogroženih območjih Bangladeša, pomagajo prebivalstvu s svojimi programi in mu krepijo samozavest. Nevladne humanitarne organizacije imajo v odnosu do okolja le blažilno funkcijo, zato je malo verjetno, da bi s svojim delovanjem zaustavile proces preobrazbe pokrajine. Vseeno je z vidika človečnosti njihov prispevek izreden in vreden vse pozornosti ter podpore. »Organizacije s svojimi programi, kot so gradnja bivališč, sanitarij, vodnjakov in protipoplavnih zatočišč, izobraževanje ter uvajanje odpornejših kulturnih rastlin, krepijo prilagoditveno zmogljivost prebivalcev« (Mehedi 2010).

Pri obravnavi družbeno-gospodarskih razmerij na podeželju Bangladeša je treba upoštevati, da »večina kmečkega prebivalstva nima lastne posesti, temveč so najemniki ali celo priložnostni delavci na veleposestvih« (Munda 2008). Učinki industrijske revolucije so vidni predvsem v demografski eksploziji, nagli urbanizaciji in ruralizaciji mest. »Mesta v Bangladešu so po svoji hitri rasti, prenaseljenosti in ruralizaciji v samem svetovnem vrhu. Samo v Dako vsako leto pride 35.000 novih priseljencev« (Afsar 2000). Ti ne prihajajo samo z območij, ogroženih zaradi posledic podnebnih sprememb.

V Južni Aziji je treba hkrati upoštevati vpliv medverskih odnosov. Verske skupnosti se zaradi razlik v miselnosti na okoljske strese različno odzivajo. V Bangladešu prevladujejo muslimani, vendar je v jugozahodnem delu države, ob meji z Indijo, večje število hinduistov pa tudi nekaj kristjanov in animistov. Od verske pripadnosti so odvisne družbene lastnosti prebivalstva, kot so: družinski odnosi, stopnja rodnosti, ambicioznost, strah pred neznanim, solidarnost in v veliki meri tudi politična stabilnost države.

Da bi bolje razumeli razmere v okraju Shyamnagar, je potreben vsaj površen pregled najučinkovitejših dejavnikov, ki povečujejo ranljivost okolja in so hkrati ključni potisni selitveni dejavniki. Pri obravnavi dejavnikov podnebnih selitev Oli Brown (2008) navaja delitev po Robertu Mc Lemanu z Univerze v Ottawi. Slednji razvršča dejavnike podnebnih selitev v dve skupini: podnebni in nepodnebni dejavniki. Med podnebnimi dejavniki loči podnebne procese in podnebne dogodke. Podnebni procesi so počasni in vztrajni, na primer dviganje morske gladine, zasoljevanje prsti, dezertifikacija in krčenje virov pitne vode ter hrane. Po drugi strani so podnebni dogodki nenadni in dramatični, na primer poplave, viharji in tropski cikloni. Glede nepodnebnih dejavnikov je mnenja, da so številne naravne nesreče, vsaj deloma, posledica človeškega dejavnika. Naravna nesreča lahko postane naravna katastrofa le v primeru, če je prizadeta skupnost posebno ranljiva na njene vplive. Med nepodnebne dejavnike tako uvršča sistem zgodnjega obveščanja, kakovost gradnje objektov, ozaveščenost prebivalstva, izpostavljenost bivališč in prilagoditveno zmogljivost skupnosti, tj., kako se je določena skupnost sposobna soočiti s podnebnim dogodkom in se po njem obnoviti (Brown 2008: 17–19).

Najočitnejša posledica globalnih podnebnih sprememb v okraju Shyamnagar je dviganje morske gladine. V primeru »dviga morske gladine za okrog 1 m do leta 2100« (The World Bank 2012: 29–34) bi »morje zalilo petino države, 20 milijonov prebivalcev bi se moralo preseliti in izgubili bi tretjino riževih polj« (IPCC-AR4 2007: 469–506). Okraj Shyamnagar bi v tem primeru morje zalilo v celoti. Za gradnjo ustreznih zaščitnih nasipov država nima denarja, medtem ko bi bila mednarodna pomoč nezadostna. Drugi prilagoditveni ukrepi, kot so prestrukturiranje kmetijstva, gradnja zatočišč in pogozdovanje, dolgoročno ne bi zadostovali. Vendar je pri tem treba upoštevati številne blažilne okoliščine. Ena takšnih je velika verjetnost, da bodo spremembe okolja postopne in se bo prebivalstvo lahko postopoma umikalo s prizadetih območij. Posledično do množičnih podnebnih selitev verjetno ne bo prihajalo, razen v primeru južnih naravnih nesreč. »Večji pomen blažilnih okoliščin bo upoštevan tudi pri naslednjem poročilu IPCC, ki ga pripravljajo za konec leta 2013« (World Bank 2012).

Dviganje morske gladine povzroča zasoljevanje prsti. »Samo med letoma 1973 in 2003 je zasoljevanje v Bangladešu zajelo 0,17 milijona hektarjev novih zemljišč ali petino države« (International Union 2009: 45). V okraju Shyamnagar so nekatere tradicionalne sorte riža nadomestili s hibridnimi, vendar »te zahtevajo intenzivnejše kmetovanje z uporabo kemičnih sredstev, ki dodatno obremenjuje okolje« (Ahmed, Shamsudin 2011: 37–50). Dviganje morske gladine ogroža tudi mangrovski gozd Sundarban,

ki pokriva najjužnejši del okraja Shyamnagar in je naravni prehod med kopnim in morjem. »Degradacijo gozda najbolj povzročata zasoljevanje prsti in nelegalno krčenje, saj so izkrčena območja dviganju morske gladine in delovanju tropskih ciklonov bolj izpostavljena« (Gain idr. 1998: 144–145).

Bangladeš ima monsunsko podnebje in »kar 80–85 odstotkov padavin zapade v deževnem obdobju med junijem in oktobrom. Nihanje količine padavin na medletni ravni je izrazito, zato občasno nastopi sezonska suša« (Ahmed, Shamsuddin 2011: 76–86). Da bi zmanjšali vpliv tega podnebnega pojava, so kmetje v okraju Shyamnagar razvili namakalni sistem, ki ga ogroža zadrževanje rečne vode v indijskih akumulacijskih jezerih. To povzroča vdiranje morske vode v sistem delte, kar slabi oskrbo s pitno vodo, medtem ko rečna voda postane preslana za namakanje. Zaradi podnebnih sprememb se deževno obdobje krajša, zato monsunsko deževje občasno zamuja tudi več mesecev.



Fotografija 3: V sicer idilični pokrajini, ki jo obdaja obilje vode, morajo ženske iz vasi Kalisha Bunia v občini Gabura dnevno prehoditi tudi tri kilometre dolgo pot do najbližjega vodnjaka (avtor: Jurij Kočar).

Opazno je »vedno večje sezonsko nihanje rečnega vodostaja« (Ahmed, Shamsuddin 2011: 50–63), kar dodatno slabi stabilnost sistema delte. »V deževni dobi se bočna erozija občutno okrepi in ogroža zaščitne nasipe« (Gain idr. 1998: 27–41). Rečni rokavi tečejo po izgonih, medtem ko so naselja na nasipih ali v nižje ležečih poplavnih ravninah.

Najsilovitejši podnebni pojav v okraju Shyamnagar je tropski ciklon. »Letno nastanejo v Bengal-skem zalivu le dva do trije tropski cikloni, vendar je obalno območje Bangladeša zaradi svoje nizke prilagoditvene zmogljivosti najbolj ranljivo na svetu. Kar polovica vseh svetovnih žrtev tropskih ciklonov (okrog 5.000 na leto) je iz Bangladeša« (Ahmed, Shamsuddin 2011: 63–76), vendar je podatek zavajajoč, saj je dolgoletno povprečje visoko zlasti zaradi dveh katastrofalnih tropskih ciklonov: »Bhole iz leta 1970 z več kot pol milijona smrtnimi žrtvami in Boba 01 iz leta 1991 s 138.000 mrtvimi« (Ahmed). Po napovedih naj bi se »pogostost in silovitost tropskih ciklonov v tem stoletju povečevali« (IPCC-AR4 2007: 469–506), vendar »po ocenah Bangladeškega meteorološkega oddelka trendi zadnjih desetletij tega ne potrjujejo« (Ahmed, Shamsuddin 2011: 63–76).

Zadnji katastrofalni tropski ciklon je bil Aila, ki je 25. maja 2009 »zajel obalno območje ob meji med Indijo in Bangladešem« (Mehedi 2010). »Po mednarodni lestvici Svetovne meteorološke organizacije je bil superciklon oziroma ciklon največje energijske vrednosti« (Ahmed, Shamsuddin 2011). »Po podatkih bangladeškega Oddelka za površje in okrevanje (DRR) je ciklon Aila terjal 330 smrtnih žrtev, od tega 193 v Bangladešu, poleg njih je bilo pogrešanih še 8.208 oseb in našteji so milijon brezdomcev. Samo v Bangladešu je bilo okrog 20 milijonov ljudi ogroženih zaradi bolezni, povezanih s to naravno katastrofo« (Ahmed 2012; Mehedi 2010). Nekaj tednov po ciklonu se je približno tretjina prebivalcev najbolj prizadetih vasi v okraju Shyamnagar izselila v bližnja mesta, veliko tudi v Khulno, Dako in Kalkuto v sosednji Indiji. »Posebno uničujoč je bil šestmetrski poplavni val, ki je poplavlil okrog 80 odstotkov okraja Shyamnagar in porušil vsa vaška naselja ob rečnih rokavih. Aila je svoj višek dosegla sredi dneva, zato se je večina prebivalstva uspela umakniti v zatočišča in na višje nasipe« (Mehedi 2010).



Fotografija 4: Protipoplavni nasip v vasi Chuibarua v občini Padma Pukur je zaradi Aile popustil in voda iz rečnega rokava (desno) je zalila koče na poplavni ravnici (levo). Območje v ozadju, ki je danes pod vodo, je bilo pred katastrofo riževo polje (avtor: Jurij Kočar).

Eden najpomembnejših nepodnebni dejavnikov je gostota prebivalstva. Azijske megadelte so območja z največjo gostoto prebivalstva na svetu in med njimi je s svojimi 1.142 preb./km² v letu 2010 (Trading Economics 2012) tudi Bangladeš. Okraj Shyamnagar ima s 680 preb./km² (Mehedi 2010) skoraj enkrat nižjo gostoto prebivalstva od državnega povprečja, vendar ima slabše naravne razmere, zato je agrarno prenaseljen. Zelo velik problem je revščina. Večina prebivalcev okraja Shyamnagar se preživlja s primarnimi dejavnostmi. Stopnja revščine je 48,7-odstotna in še raste (Mehedi 2010). Za širše območje Bangladeša so značilne majhne kmetije z ribnikom, ki je vir vode in hrane, toda med prebivalci okraja Shyamnagar prevladujejo najeti kmetijski delavci brez posesti. Dodaten dohodek ustvarjajo z ribolovom, s sečnjo in z nabiranjem medu divjih čebel.

S komercializacijo kmetijstva »so veleposestniki del riževih polj prestrukturirali v farme škampov, zato so odpustili presežne kmetijske delavce in družinam zmanjšali samooskrbo« (Gain idr. 1998: 116–121). Kmetijski delavci so med jesensko mrtvo sezono prisiljeni kupovati hrano z zaslužkom od nabi-



Fotografija 5: Otroka iz vasi Chuibarria med nabiranjem morskih rakov. Med Ailo je morska voda po rečnem rokavu prodrla v notranjost in zalila farme škampov. Območje je ostalo močno zasoljeno in primerno le še za gojenje morskih rakov (avtor: Jurij Kočar).

ralništva, kar povečuje njihovo revščino in občasno povzroča lakoto. »Na območjih farm škampov je površje zalito z brakično vodo, ki postopno pronica v podtalnico, kar slabša oskrbo s pitno vodo« (Gain idr. 1998). Mnogi prebivalci so jo prisiljeni nositi več kilometrov daleč in zanjo celo plačevati. Ob poplavih lahko voda poruši nasipe in zalije kulturne površine, da te niso več uporabne za gojenje škampov in še manj za vnovično gojenje riža. Območje je poplavljenno s slano vodo, ki se ne umakne več let, zato namesto škampov začnejo gojiti morske rake, kar je zadnja faza pred dokončno izgubo kopnega.

ANALIZA IN REZULTATI RAZISKAVE

Pri raziskavi o prisotnosti podnebnih selitev v okraju Shyamanagar so bili pomembni rezultati anketiranja o okoljski ozaveščenosti. Brez nje se pri prebivalcih ne bi razvila potreba po krepitvi prilagoditvene zmogljivosti, del katere so tudi podnebne selitve kot skrajni prilagoditveni ukrep v boju s posledicami podnebnih sprememb. Anketiranci so presenetljivo izkazali precejšnjo ozaveščenost in skrb za okolje. V zadnjih letih jih kar 91 odstotkov opaža spremembe v okolju. Delež je zelo visok, saj se je v podobni raziskavi, opravljeni v Funafutiju na otočju Tuvalu, izkazalo, da »so mladi na spremembe zaradi slabšega vpogleda v preteklo stanje manj dovzetni« (Mortreux, Barnett 2009). Na visoko okoljsko občutljivost prebivalstva v okraju Shyamnagar sta med drugim vplivali izkušnja z Ailo in višja starost anketirancev. Starejši prebivalci imajo možnost vpogleda globlje v preteklost in so zato bolj pozorni na podnebne spremembe. Slaba dostopnost medijev in pomanjkljiva izobrazba sta lahko pri ozaveščanju velika ovira. Številne nevladne organizacije, ki so prisotne na ogroženem območju, vključujejo v svoje načrte za dvig prilagoditvene zmogljivosti tudi ozaveščanje prebivalstva.

Še večji delež anketirancev (97 odstotkov) je zaskrbljen zaradi posledic podnebnih sprememb. O problemu se v Bangladešu veliko razpravlja. Tudi ta rezultat kaže na dejavnosti vlade in nevladnih organizacij. Prebivalci, ki so bili nedavno soočeni s posledicami podnebnih sprememb, so zelo dobro informirani o prilagoditvenih ukrepih, kot je izgradnja protipoplavnih zatočišč. Nekajkrat letno zaradi nevarnosti tropskega ciklona prebivalcem prepovejo plovbo, kar jim občasno za več dni omeji ribolov. Kljub temu se trenutno 96 odstotkov anketirancev ne namerava preseliti, kar kaže na uspešnost številnih programov, ki jih različne organizacije izvajajo v okviru krepitev prilagoditvene zmogljivosti, saj velja izselitev za nezaželen prilagoditveni ukrep. Poleg tega na območju okraja Shyamnagar že nekaj let ni bilo s tropskim ciklonom povezane naravne nesreče. Kljub temu o izselitvi razmišljajo vsi, med njimi kar tretjina pogosto, preostali dve tretjini pa redko, kar kaže na to, da je stanje v okolju labilno in z njim niso zadovoljni.

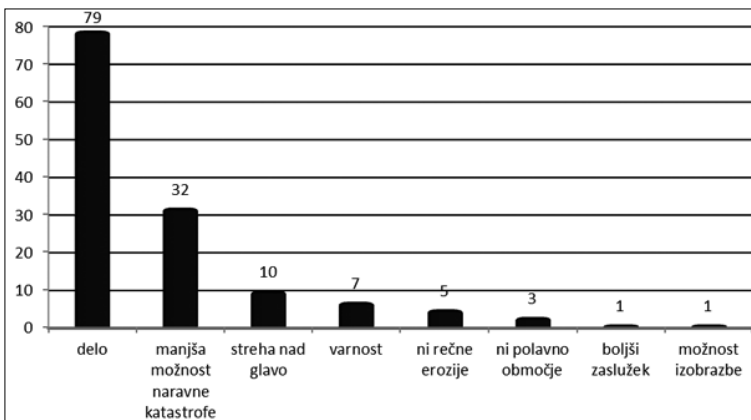
Na vprašanje: »Kam bi se v primeru odločitve preselili?« jih je kar polovica navedla bližnjo vas, kar je razumljivo, saj se podeželska skupnost, ki se oklepa tradicij svojih prednikov, težko odloči za temeljito spreminjanje življenjskega sloga in je v nasprotnem primeru to zanje zelo stresno. Selitvi v bližnja mesta, torej selitvi v okviru utečenih ruralno-urbanih tokov, daje prednost le petina anketirancev, le redki (6 odstotkov) razmišljajo o selitvi v Dako in le en anketiranec bi izbral za končni cilj Indijo. Preostalih 23 odstotkov o tem nima izrazitega mnenja in odgovarja, »da jim je vseeno, le da bi dobili delo in da bi bili na varnem«. Pri slednjih ni opaziti večje ambicioznosti, zato bi se najverjetneje odločili za bližnja naselja. Zanimivo je majhno zanimanje za selitev v Indijo, saj je po mnenju uslužbenecv Karitasa v okraju Shyamnagar okrog petina prebivalcev hinduistov, ki so življenju v Indiji naklonjeni in imajo tam razvito sorodstveno mrežo. Po drugi strani je treba upoštevati, da v sosednji indijski državi Zahodna Bengalija s komaj 30 km oddaljeno prestolnico Kalkuto standard prebivalstva ni bistveno boljši od bangladeške-



Fotografija 6: Študent ekonomije Joyanta Kumar iz vasi Boskhali v občini Kaikhali stoji pred hišo strica, ki se je po Aili z družino preselil v Indijo. Pri študiju mu gmotno pomaga oče, ki zato že več mesecev dela v sosednjem okrožju Bagerhat (avtor: Jurij Kočar).

ga. Rezultati potrjujejo dosedanje ugotovitve, da »se revno prebivalstvo bangladeškega podeželja zelo redko odloči za mednarodne selitve« (Black idr. 2008: 27–36). Temu so vzrok tudi intervencijske ovire. Na podlagi teh rezultatov je ovržena zgoraj postavljena hipoteza o verjetnosti skorajšnje preobrazbe notranjih podnebnih selitev v mednarodne. Rezultati raziskave izključujejo možnost skorajšnje krepitve mednarodnih selitvenih tokov v okraju Shyamnagar. Do podobnih zaključkov so prišli v primerljivi raziskavi na otoku Funafuti v otočju Tuvalu (Mortreux, Barnett 2009).

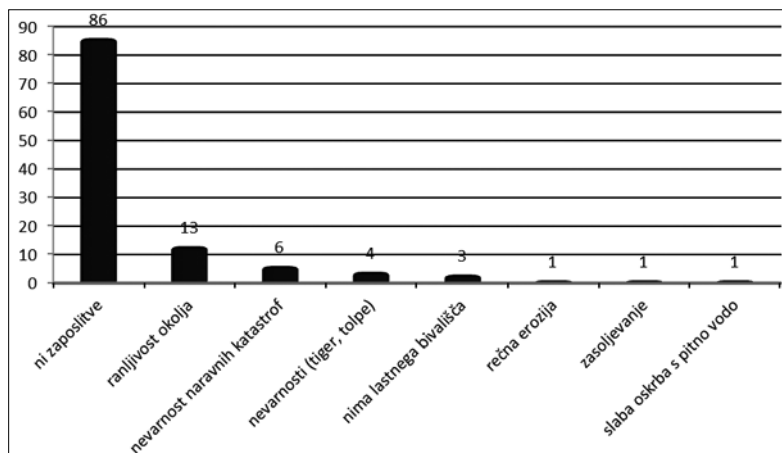
K preverjanju prevlade podnebnih selitev znotraj ustaljenih selitvenih tokov so pripomogli rezultati odgovorov na vprašanje: »Kaj pričakujete od ciljnega kraja izselitve?« Pri tem vprašanju je bilo mogoče navesti več odgovorov. Velika večina (80 odstotkov) pričakuje zaposlitev. Desetina jih navaja boljše bivalne razmere, en anketiranec je navedel boljšo možnost izobraževanja in 7 odstotkov si želi večjo varnost. Pri slednjih je mišljena nevarnost napadov oboroženih tolpa, ki pod krinko skrajne ideologije prežijo na gozdne nabiralce in vaščane ob robu gozda Sundarban in od njih izsiljujejo denar. Precej (40 odstotkov) jih je navedlo tudi okoljske težave, a med njimi jih kar 80 odstotkov omenja manjšo možnost naravne katastrofe, torej se jim postopnejše spremembe v okolju, kot sta zasoljevanje prsti in krepitev rečne erozije, ki bi lahko bile vzrok stalnih podnebnih migracij, zdijo manj pomembne. Rezultati so pokazali prevlado gospodarskih dejavnikov nad okoljskimi, vključno s podnebnimi.



Graf 4: Rezultati odgovorov na vprašanje »Kaj pričakujete od ciljnega kraja selitve?« (avtor: Jurij Kočar)

To ugotovitev dodatno potrjujejo rezultati odgovorov na vprašanje: »Kaj vam ni všeč v kraju bivanja?« Tudi pri tem vprašanju je bilo možnih več odgovorov. Pričakovano jih je kar 86 odstotkov navedlo majhne možnosti zaposlitve, 13 odstotkov jih je navedlo ranljivost okolja, 6 odstotkov nevarnost naravnih katastrof, 4 odstotki izpostavljenost divjim živalim (tigrom) in gozdnim tolpom, 3 odstotki so navedli slabe bivalne razmere, po en anketiranec je omenil rečno erozijo, zasoljevanje prsti ter slabo oskrbo s pitno vodo. Če združimo vse z okoljem povezane dejavnike, je te navedlo komaj 22 odstotkov anketirancev, kar znova kaže na prevlado gospodarskih selitvenih dejavnikov. V primeru obstoja podnebnih selitev bi morali prevladovati s podnebnimi spremembami povezani selitveni dejavniki. Tako pa so, razen v primeru naravnih nesreč, v senci gospodarskih.

Povsem drugačni so rezultati odgovorov na vprašanje: »Ali menijo, da se bodo morali v prihodnosti izseliti zaradi posledic okoljskih sprememb?« Velika večina (90 odstotkov) je v to prepričana in tudi preostali to navajajo kot možno izbiro. Vzroka sta verjetno dva. Prvi razlog je lahko, da se okoljski problemi očitneje kažejo šele v zadnjem desetletju ali dveh, oziroma se je čas očitnih posledic šele začel. Drugi možni razlog je ta, da se s programi nevladnih organizacij in poročanjem medijev o okoljskih problemih pretirano vznemirja ljudi. Slednji je, glede na očitno degradacijo okolja, manj prisoten, zato obstaja velika verjetnost, da se bodo v prihodnosti s krepitvijo posledic podnebnih sprememb krepile tudi podnebne selitve, verjetno tudi tiste, ki niso neposredna posledica naravnih nesreč.



Grf 5: Rezultati odgovorov na vprašanje »Kaj vam ni všeč v kraju bivanja?« (avtor: Jurij Kočar)

Na koncu so bili anketiranci vprašani o svojem mnenju o tem, kateri učinki podnebnih sprememb v okolju so že opazni. Odgovori so bili zelo pestri, kar spet kaže na dobro ozaveščenost prebivalstva. Največ (13 odstotkov) jih je navedlo rečno erozijo, 8 odstotkov zasoljevanje prsti, 6 odstotkov naravne katastrofe, 5 odstotkov intenzivnejše plimovanje, 4 odstotki viharje, 3 odstotki uničevanje gozda, 2 odstotka vse bolj vroča poletja, prav toliko jih omenja sušo. Kar nekaj odgovorov ni bilo ustreznih ali anketiranci niso podali mnenja, saj vprašanja verjetno niso razumeli.

Glede na pridobljene rezultate raziskave menim, da se na območju okraja Shyamnagar podnebne selitve v normalnih razmerah v okolju za zdaj ne pojavljajo. Prebivalci so zaradi stanja v okolju sicer zaskrbljeni in do njega občutijo celo osebno odgovornost, vendar okoljski problemi še vedno niso prevladujoč selitveni dejavnik. Prebivalci se odločajo za selitev pretežno iz gospodarskih vzrokov, ki so posledica agrarne prenaseljenosti. Izjema pri tem so tropski cikloni, ki kot ekstremni vremenski pojavi občasno povzročijo naravno katastrofo. Ta sproži val podnebnih, tako začasnih kot stalnih migrantov, katerih število je v primerjavi z gospodarskimi migranti znotraj obstoječih selitvenih tokov precej manjše. Ob smotni gospodarski politiki in okrepljenem izvajanju prilagoditvenih ukrepov bi bilo mogoče njihovo število dodatno omejiti. Kljub temu obstaja velika verjetnost, da se bodo v prihodnosti zaradi krepitve posledic podnebnih sprememb okrepile tudi podnebne selitve, vključno s tistimi, ki niso neposredno povezane z naravnimi nesrečami.

ZAKLJUČEK

Vprašanje podnebnih selitev, ki s krepitvijo podnebnih sprememb preraščajo v vse širši pojav, postaja vse večji izziv za raziskovalce različnih družboslovnih ved. Pri tem ni povsem jasno, za katero vrsto selitev gre in kako velik problem dejansko predstavljajo. Realno lahko pričakujemo, da se bomo v prihodnosti zaradi vse bolj očitnih posledic podnebnih sprememb na bolj ranljivih območjih sveta srečevali z vse večjimi selitvenimi gibanji. Eno takšnih je okraj Shyamnagar na obalnem območju Bangladeša. Dejavniki, ki prispevajo k ranljivosti okolja, so: dviganje morske gladine, degradacija gozda, zasoljevanje prsti, vdori slane vode v podtalnico, sezonska suša, rečna erozija, tropski cikloni, gostota prebivalstva in gospodarska zaostalost.

Pri pojavu podnebnih selitev so ključni ekstremni vremenski pojavi, ki porušijo ravnovesje v okolju in na gosto poseljenem območju zmanjšajo možnosti preživetja. V primeru okraja Shyamnagar je bil to uničujoči tropski ciklon Aila iz leta 2009. Prebivalstvo se je po nekaj tednih izrednih razmer začelo množično razseljevati na varnejša območja, zlasti v bližnje vasi. Okrepili so se tudi ruralno-urbani selitveni

tokovi v bližnja mesta in celo v Dako ter Indijo. Kljub temu o pojavu večjih mednarodnih selitev v tem primeru ne moremo govoriti. Okrepljene selitve so se po nekaj mesecih začele umirjati in se končno ustalile. Namen raziskave je bil preveriti naslednje hipoteze:

- c) Znotraj obstoječih selitvenih tokov prevladujejo podnebne selitve.
- d) Notranje podnebne selitve bodo kmalu prerasle v množične mednarodne selitve.

Rezultati raziskave so ovrgli obe hipotezi. Na obstoječe selitve v okraju Shyamnagar prevladujoče vplivajo gospodarski selitveni dejavniki. Kljub presenetljivi okoljski ozaveščenosti prebivalstva so problemi okolja v senci gospodarskih selitvenih dejavnikov. Prebivalci so tako revni, da jih pri življenjskih odločitvah vodi težnja po preživetju. Ključni dejavnik pri tem je dostopnost hrane, ki jo morajo v glavnem kupovati s težko prisluženim denarjem. Vzroki selitev v prvi vrsti izhajajo iz prestrukturiranja kmetijske proizvodnje, ki povzroča ruralno-urbane selitvene tokove. Trenutno so skrbi razvitih držav glede množičnih podnebnih selitev mednarodnih razsežnosti pretirane. S primernimi prilagoditvenimi ukrepi, ki jih izvajajo številne nevladne organizacije ob podpori vlade in mednarodne pomoči, se lahko škoda zaradi naravnih nesreč zmanjša in večino prebivalstva zadrži na prizadetem območju. Kljub temu vprašanje, kako se bodo selitve ob obstoječih trendih podnebnih sprememb razvijale v prihodnosti, ostaja odprto, kar je lahko predmet naslednje raziskave.

LITERATURA

- Afsar, Rita (2000). *Rural-Urban Migration in Bangladesh*. Daka: The University Press Limited.
- Ahmed, Nepur (2012). *Post Cyclone Challenges of Relief & Rehabilitation Operation in Coastal Areas*, <http://ions.gov.in/sites/default/files/Papers%20presented%20during%20seminar9.pdf> (30. 11. 2012).
- Ahmed, Rafik, Shamsuddin, S. Dara (2011). *Climate Change: Issues and Perspectives for Bangladesh*. Daka: Shahitya Prakash.
- Black, Richard, Kniveton, Dominic, Skeldon, Ronald, Coppard, Daniel, Murata, Akira, Schmid-Verkerk, Kerstin (2008). *Demographics and Climate Change: Future Trends and Policy Implications for Migrations*. Brighton: University of Sussex, Development Research Centre on Migration, Globalisation and Poverty.
- Brown, Oli (2008). IOM Migration Research Series No. 31. *Migration and Climate Change*. Ženeva: International Organization for Migration (IOM).
- Gain, Philip, Moral, Shishir, Raj, Priscilla, Sircar, Lucille (1998). *Bangladesh Environment: Facing the 21st Century*. Daka: Society for Environment and Human Development.
- IPCC-AR4 (2007). *Climate Change 2007: Impacts, Adaptation and Vulnerability*. Cambridge: Cambridge University Press.
- International Union for Conservation of Nature, United Nations Environment Programme, United Nations University (2009). *Biodiversity Conservation and Responce to Climate Variability at Community Level*, <http://data.iucn.org/dbtw-wpd/edocs/2009-055.pdf> (20. 12. 2012).
- Klemenčič, Matjaž (2007). Immigration and Emigration in Historical Perspective. *Migrations in history*. Pisa: Pisa University Press.
- Klemenčič, Matjaž (2009). Immigration and Emigration in Historical Perspective. *Slovenes beyond Slovenia, in Europe and Overseas*. Pisa: Pisa University Press.
- Klinar, Peter (1985). *Mednarodne migracije v kriznih razmerah*. Sociološka in politološka knjižnica 18. Ljubljana: FSPN – Univerza Edvarda Kardelja v Ljubljani.
- Kočar, Jurij (2012). Otočje Tuvalu kot primer ranljivosti atolov na dviganje morske gladine zaradi podnebnih sprememb. *Geografija v šoli XXI/3*, 55–62.
- Mehedi, Hasan (2010). *Climate Induced Displacement: Case Study of Cyclone Aila in the Southwest Coastal Region of Bangladesh*, <http://www.scribd.com/doc/62101355/Climate-Induced-Displacement-Case-Study-of-Cyclone-Aila-in-the-Southwest-Coastal-Region-of-Bangladesh> (21. 12. 2012).

- Mortreux, Colette, Barnett, Jon (2009). Climate Change, Migration and Adaptation in Funafuti, Tuvalu. *Global Environmental Change* 19, 105–112.
- Munda, Krisnapada (2008). *Causes, Consequences of and Remedies to Poverty of the Tribal Mundas of the Sundarban Forest*. Khulna: University of Khulna – Department of Economic Studies.
- The World Bank (2012). *Turn Down the Heat – Why a 4°C Warmer World must be avoided*. Washington: Potsdam Institute for Climate Impact Research and Climate Analytics.
- Trading Economics* (2012), <http://www.tradingeconomics.com/bangladesh/population-density-people-per-sq-km-wb-data.html> (20. 12. 2012).
- Zwitter, Žiga (2012). Podnebne spremembe na Slovenskem v zadnjem tisočletju. *Geografija v šoli* XXI/1–2, 61–71.

NEKATERI ASPEKTI VKLJUČEVANJA V ARGENTINSKO DRUŽBO SKOZI PRIZMO IZSELJENSKE KORESPONDENCE

Miha ZOBEC¹

COBISS 1.01

IZVLEČEK

Nekateri aspekti vključevanja v argentinsko družbo skozi prizmo izseljenske korespondence

Članek obravnava nekatere aspekte priseljevanja primorskih Slovencev v argentinsko družbo, kot so se kazali skozi izseljensko korespondenco. Temelji na osebnih izkušnjah migracijskega procesa, kot so ga doživeli člani družine Vrabc iz Pliskovice na Krasu in nekateri drugi vaščani. V ospredju članka so osebni vidiki vključevanja v argentinsko družbo, pri čemer je izpostavljeno tako vzdrževanje vezi, ki so jih stkali na domačih tleh (s sorodniki, prijatelji, širšo »vaško skupnostjo«), kot vzdrževanje stikov s tistimi, ki so ostali doma.

KLJUČNE BESEDE: izseljevanje, Argentina, fašizem, korespondenca, migracijske mreže

ABSTRACT

Some Aspects of Integration into Argentinian Society through the Perspective of Emigrant Correspondence

The article deals with some aspects of immigration of Littoral Slovenes into Argentinian society as they unfolded through immigrant correspondence. It is based on personal accounts of the migration process as it was experienced by the members of the Vrabc family from the village of Pliskovica on the Karst and some other villagers. The article emphasizes personal perspectives of integration into Argentinian society, focusing on maintaining bonds that were made at home (in the framework of relatives, friends, and the wider "village community"), as well as maintaining contacts with those who remained at home.

KEY WORDS: emigration, Argentina, fascism, correspondence, migration networks

UVOD – PISMA KOT VIR PREUČEVANJA SELITVENIH IZKUŠENJ, DOPOLNITEV K DOSEDANJIM RAZPRAVAM

V pričujočem članku predstavljam izseljevanje primorskih Slovencev in njihovo vključevanje v novo, argentinsko družbo, kot se to kaže skozi pisemsko korespondenco. Gre za osebne izkušnje izseljenskega procesa, kot so ga doživeli pripadnika družine Vrabc, dekle in poznejša soproga enega od njiju, ter nekateri drugi prebivalci vasi Pliskovica na Krasu (vas na poti med Sežano in Novo Gorico). Izseljevanje

¹ Prof. zgodovine in sociologije, mladi raziskovalec; Filozofska fakulteta Univerze v Mariboru, Oddelek za zgodovino, Koroška cesta 160, SI-2000 Maribor; miha.zobec@gmail.com.

v času med svetovnimi vojnami, ki je predmet prispevka, je historiografija tradicionalno obravnavala z nacionalno-političnega zornega kota, pri tem pa prezrla pomembne silnice, ki so delovale na ravni manjšega okolja, kot je bila vaška skupnost, kot tudi na ravni subjektivnega vedenja posameznika. Ob upoštevanju omenjenih parametrov postane izseljevanje veliko kompleksnejši proces.

Raziskovalci migracij so spoznali, da uveljavljene migracijske teorije ne pojasnjujejo zadovoljivo kompleksnosti migracijskega fenomena. Problem, ki se je pri teorijah migracij pojavil, je, da te ne zmorejo pojasniti, zakaj se za migriranje odloči tako malo ljudi in zakaj se je v migracijskih gibanjih v zgodovini selila le manjšina prebivalstva, medtem ko je večina ostala doma. Arrango poudarja, da bi morale teorije zato upoštevati tudi negibnost oziroma tiste sile, ki vplivajo na to, da se ljudje namesto za selitev odločijo ostati doma. Tak pogled predpostavlja, da bi morali večjo pozornost posvetiti družinskim tipom, sorodstvenim sistemom in socialnim strukturam na splošno (Arrango 2000: 293).

Namesto ukvarjanja z »valovi« in s »tokovi« migracij se zgodovinarji migracij danes ukvarjajo z dejavnostjo moških in žensk, ki si skladno z družbenimi omejitvami in možnostmi prizadevajo za uresničitve življenjskih načrtov. Fokus je usmerjen proti specifičnim posameznikom, ki so izhajali iz točno določenih regij in so se za selitev odločili v posebnem življenjskem trenutku (Harzig, Hoerder 2009: 3–4). Prav analiza korespondence nam lahko pomaga pri interpretaciji izkušenj posameznih migrantov, ki so jih študije migracijskih procesov velikokrat prezrle. Ob pomoči osebne korespondence lahko preučimo ravnanje selivca kot individuuma. Pred nas stopi posameznik, sicer nikoli neodvisen od svojega okolja, a vendarle posameznik, ki jasno vleče življenjske poteze in svoje izkušnje beleži.

Večji ali manjši ostanki zapisanega so v pomoč zgodovinarjem, ki za raziskovanje preteklosti ne morejo uporabiti vprašalnikov, intervjujev, opazovanja z udeležbo ali podobnih kvalitativnih metod, kot jih uporabljajo njihovi sociološki kolegi (Baily, Ramella 1988: 2). Pisma izseljencev so povečini del dokumentov populacije, ki običajno ni zapustila vidnejših pisnih sledov in jo je zato historiografija do nedavnega prevečkrat puščala ob robu pomembnega dogajanja oziroma jo je obravnavala kot amorfno množico. Zanimanje za individualnost t. i. malih ljudi se je prebudilo šele v zadnjih desetletjih (Verginella 2004: 7). V nasprotju z gradivom državnih institucij, ki nam omogoča pogled na ravnanje ljudi z vidika državnih organov, lahko s pomočjo epistolarnega gradiva pridobimo neposredni vpogled v doživljanje sveta »navadnih ljudi« in tako lahko namesto v zgodovino pisju uveljavljenega pogleda »od zunaj« uporabimo »pogled od znotraj«. ¹ Kljub temu da so izseljenska pisma povečini del zapisov »neukega« prebivalstva, lahko vsaj za naš primer zapišemo, da so se akterji izražali dovolj jasno in razločno, da lahko razumemo njihove zapise, čeprav so pisali v narečju. Skromna šolska izobrazba in nepoznavanje slovenskega zbornega jezika sta najbrž pripomogla k temu, da je njihovo pisanje bližje ustni kulturi kot pa pismenemu izražanju. ²

Dopisovanje je ponovno povežalo razdruženo družino in vzpostavilo most med tistimi, ki so se soočali z vključevanjem v novo družbo, in onimi, ki so doma preživljali čas intenzivnega zgodovinskega dogajanja. Na ta način se izražajo subjektivne razsežnosti migracijskih procesov, in prepoznavanje te plati je ena med najbolj dragocenimi prednostmi, ki jo prinaša analiza izseljenske korespondence (Baily, Ramella 1988: 4). Pisma migrantov (namenjena družinskemu krogu in ožjim prijateljem) so predvsem osebne na-

1 Franzina govori tudi o »drugačni zgodovini«, ki naj bi jo pisali prav s pomočjo uporabe dokumentov 'ljudskega pisanja' (scrittura popolare). Velik del zgodovino pisja je namreč temeljil na uporabi gradiva vrhnjih plasti družbe ali državnih institucij in je zato zanemarjal nižje družbene sloje ali pa jih obravnaval zgolj kot nevidne množice. Uporaba gradiva 'podrejenih slojev' (classi subalterni) prinaša tudi drugačno zgodovino pisje, saj je slika, ki jo dobimo z uporabo tovrstnih virov, precej drugačna od tiste, ki jo prinaša raba uveljavljenih virov, torej virov državnih institucij. Omogoča nam vpogled v zgodovinsko dogajanje s perspektive množičnih slojev – med takimi viri pa so prav izseljenska pisma (Franzina 2000 [1994]: 22–23).

2 Franzina trdi, da so pisma migrantov bližje ustni kot pa pisni kulturi (treba pa je vedeti, da je v svojem delu uporabil pisma kmetov iz Furlanije in Veneta, poslana med letoma 1876 in 1902) in uporablja izraz »pisma nepismenih«. Italija, zlasti v nekaterih pokrajinah, je imela dolgo tradicijo ljudskega ustvarjanja, tudi na področju književnosti. Vpliva tovrstnih del na pisanje pisem ni mogoče ne enostavno pojasniti ne zanemariti (ibid.: 25–26).

rave in dokumentirajo vezi družinske solidarnosti, močnih čustvenih in siceršnjih povezav med tistimi, ki so odšli, in onimi, ki so ostali doma (Drnovšek 2004: 118). V tovrstni korespondenci le redko srečamo opise kakega družbenega ali političnega dogajanja, želja piscev je v večji meri ta, da vzdružuje in utrjuje s selitvijo prekinjene vezi. Pisec natančno ve, kaj prejemnik od njega pričakuje, zato se ne izraža vselej s čisto jasnimi stavki in zahtevami, temveč veliko stvari zanemari ali zamolčuje, saj so obema stranema medsebojne obveznosti povsem jasne (Thompson 2000 [1978]: 121). Te obveznosti so namreč temeljile na težnji po ohranjanju medsebojnih odnosov tudi za ceno ločenosti več tisoč kilometrov (Milharčič Hladnik 2009: 37). Pisma pa ne dokumentirajo samo vztrajnih osebnih in družinskih vezi, marveč govorijo tudi o vraščanju v tkivo neke nove stvarnosti, o odnosih z drugimi družbenimi skupinami na področju imigracije, o stikih in življenju izseljenčeve matične skupnosti v novem svetu ter o širših mentalnih in družbeno-kulturnih spremembah, ki jih doživljajo tako izseljenec v novem okolju kot domačini v rojstnem kraju. Pismo je pač ogledalo človekove notranjosti, in čeprav je napisano kot izraz osebnega doživljanja, govori o mnogočem, le prebiti se je treba skozi na videz nepomembne drobce in zamolčane zgodbe.³

Pisma so torej neprecenljiv vir za raziskovanje osebnih izkušenj migracijskega procesa, vendar to še vedno ne pomeni, da jih lahko uporabljamo brez vsakršnega kančka dvoma. Kritičnost je tudi pri rabi epistolarnega gradiva nujna, velikokrat celo še bolj kot pri analizi običajnega arhivskega gradiva, saj pogosto ni mogoče vedeti, v kakšnih okoliščinah je bilo pismo napisano. Nepoznavanje pisca in razmer, v katerih je pisal, lahko ohromi našo raziskavo, zato je treba dobro in temeljito spoznati tako njegovo osebnost kot širše razmerje med njim in naslovnikom ter svetom, v katerem sta delovala. Pri tem sta nam lahko v pomoč ustna zgodovina, uporaba drugih, dodatnih virov ter preostala strokovna literatura. Priporočljivo je tudi, da korespondenca obsega obe plati izkušnje (torej tistih, ki so odšli, in onih, ki so ostali doma) in je razpeta skozi daljši časovni lok. Pri migrantski korespondenci je namreč velikokrat tako, da so ohranjena le pisma z ene strani, tako da imamo pred sabo enostransko izkušnjo in ne obeh plati selitvenega procesa (Drnovšek 2004: 116).

Pred raziskovalca, ki se loteva omenjenega problema, se prav tako zarisuje vprašanje reprezentativnosti. Pisma migrantov nikakor ne morejo biti reprezentativna v smislu znanstvene uporabe v polju družbenih znanosti, saj nikoli ne moremo vedeti, kaj se je dogajalo s tistimi, ki pisem niso pisali.⁴ Raziskovalci danes poudarjajo, da je vsak pisec pisma reprezentativen ali nereprezentativen na toliko različnih ravneh – po starosti, kraju izvora, družbenem okolju, izobrazbi, poklicu, finančnem položaju, bivališču, osebnosti, zakonskem stanu, da je vprašanje reprezentativnosti odvisno od raziskovalnega aspekta. Namesto poudarjanja reprezentativnosti bi se morali vprašati, kako tipična so izseljenska pisma glede na raziskovalno vprašanje (Helbich, Kamphoefner 2006: 50).

Težko je tudi ugotoviti, kako točna oziroma preverljiva so bila dejstva v pismih. Poleg tega je vsaka zbirka nepopolna in ne moremo vedeti, koliko pisem je bilo poslanih med deželo prihoda in krajem odhoda. Kljub temu pa lahko ponovno zapišemo, da so za zgodovinarja pisma, ki se razprostirajo skozi daljši časovni lok in zajemajo korespondenco obeh strani, izjemen vir, ki nam omogoča vpogled v subjektivne izkušnje akterjev, vendar to še ne pomeni, da jih lahko beremo povsem nekritično.

3 Podobno kot za ustno zgodovino bi lahko tudi za pisma izseljencev zapisali, da se veliko informacij skriva prav tam, kjer bi jih najmanj pričakovali. Trenutke molka in bežno navajanje podatkov, ki nimajo prave povezave z neposrednim vprašanjem, bi lahko primerjali s fragmenti zamolčanega, namignjenega ali v pismih le posredno omenjenega. Pisma nam tako lahko povedo veliko več od tistega, kar je neposredno očitno, prav tako se lahko pri ustni zgodovini dokopljemo veliko globlje od enostavnih dokumentarnih odgovorov na vprašanja. Molke je prav tako del diskurza, saj predstavlja točko tistega, kar je pred zvokom in po njem. Je torej še vedno območje »besede«. Spominjanje, molk in pozaba so po interpretaciji Luise Passerini različne sestavine istega procesa (Passerini 2008: 231–257).

4 Hibe družboslovnega preučevanja korespondence ne bi bilo mogoče nadomestiti z znanstveno rigoroznostjo in zahtevami po togem upoštevanju znanstvenih kriterijev, trdi Herbert Blumer. To bi namreč ohromilo raziskavo in na koncu privedlo do razvrednotenja študije. Namesto tega predlaga, da se v raziskavo vključi tiste migrante, ki se zavedajo raziskovanih dejanj (Blumer 1979).

Če je bila zamisel socialnih zgodovinarjev o preučevanju migracije s stališča besed samih migrantov navzoča že pri začetkih raziskovanja, se je pozornost v zadnjem času usmerila še k drugim vprašanjem. Z razvojem družbenih znanosti je naraslo zanimanje za lingvistično preučevanje korespondence, veliko pozornosti se je začelo namenjati izražanju spolne identitete oziroma temu, kako se ta oblikuje skozi procese pisanja in branja. Pisma so postala uporabna tudi pri transnacionalni analizi migracij, ki si je prizadevala pojasniti sodobna migracijska gibanja in najti alternative teorijam asimilacije. Migrante ta perspektiva razume kot sočasne udeležence v dveh družbah, pri čemer si velikokrat prizadevajo za ravnotežje med izkoriščanjem ekonomskih priložnosti v deželi priselitve in zvestobo izvorni družini, ki jih emocionalno, mentalno in fizično veže na (nekdanjo) domovino (Elliot, Gerber, Sinke 2006: 11). Do podobnega sklepa o identiteti izseljencev sem prišel tudi sam, ko sem na podlagi pisemskega gradiva preučeval vključevanje primorskih izseljencev v argentinsko družbo in vzdrževanje stikov z domačim svetom. Več o njihovih identitetnih izbirah in vzdrževanju stikov z domačimi v nadaljevanju prispevka.

ZGODOVINSKO OZADJE DRUŽINE VRABEC (Z DOMAČIM IMENOM BETNI)

Glavni akterji zgodbe,⁵ ki sledi v nadaljevanju, so Albin, Franc in Milka, ki so se preselili v Argentino, Zorislava (Zora) Knez, ki je odšla za svojim fantom Marjanom v Francijo, ter Jože in Milka, brat in sestra Albina in Franca, ki sta prejemale pisma svojih družinskih članov iz dežele na drugi strani oceana in Francije.

Albin je bil po poklicu čevljar, za odhod v Argentino se je odločil leta 1927, še istega leta mu je sledilo dekle, Emilija (Milka) Širca iz sosednega zaselka Kosovelje. V zakonu, ki sta ga pozneje sklenila v Argentini, nista imela otrok. Franc je doma opravljal priložnostna dela, začel je kot kovač, z vrstniki je hodil na dnino, prodajal drva, nazadnje pa je dobil delo v tržiški ladjedelnici. Po služenju vojaškega roka je sledil Albinu in se odpravil v Argentino, kjer pa je po dobrem desetletju še mlad umrl (leta 1940). Zora je opravljala delo šivilje, v Francijo pa se je preselila na pobudo Marjana Kneza, ki je že živel tam, se je pa pogosto mudil na počitnicah na domačem Krasu. Med korespondenco je ohranjenih petnajst pisem iz Argentine (dve od Franca, sedem od Milke iz Kosovelj, pet od Albina), kar najbrž ni prav veliko, a se razprostirajo skozi precej dolg časovni lok – skorajda od prihoda v novo deželo pa vse do konca sedemdesetih let, ko je Albin umrl. Zbirka pisem, ki jih je iz Francije poslala Zora, je v časovnem razponu nedvomno skromnejša, obsega le obdobje od konca šestdesetih pa do konca sedemdesetih let in šteje devet pisem. Središče moje pozornosti bo usmerjeno v analizo pisem iz Argentine, pisma iz Francije pa bom uporabil za poudarjanje določenih vidikov ohranjanja in krepitve družinskih vezi, kar je bil ne nazadnje tudi cilj dopisovanja. Žal se pisma od doma niso ohranila, zato bom za boljše predstavitev ozadja uporabil nekatera pisma in zgodbe drugih vaščanov, saj je bilo veliko Pliskovljanov močno povezanih tudi daleč od svojega doma v Argentini. Tako bomo lahko spoznali tudi posamezne dimenzije razvoja skupnosti onkraj oceana. Pisma ne bodo analizirana v strogo kronološkem smislu, temveč bo v ospredju obravnavana posameznih problemov, ki pa jih bom razvrstil po časovnem vrstnem redu, kar bo omogočalo razumevanje dogajanja in sprememb skozi čas.

Iz pisemskega gradiva jasno izžareva neformalna socialna mreža, stkana med člani družine in njenimi sorodniki. Mreža je močno vplivala na vse faze migracijskega procesa – od odločitve za migracijo, naseljevanja v argentinskem okolju, iskanja skupnih načinov bivanja s sovaščani v letih po naselitvi,

5 Zgodovinsko ozadje družine navajam po neobjavljenih spominskih zapisih Jožeta Vrabca (tipkopisa z naslovno-ma Vrabčevo gnezdo in Življenje trnova pot – spomini; tipkopisa hrani avtor pričujočega besedila). Literatura o izseljevanju iz Julijske krajine v tem času je dokaj obsežna, glej npr.: Kalc 1996: 23–60, 1997: 193–214, 2000; Kacin Wohinz 1995: 23–31; Sjekloča 2004; Purini 2000: 171–190 idr.

vzpostavljanja društvenih aktivnosti in iskanja delovnega mesta. Najbrž ni imela tako odločilnega pomena kot v primerih, kjer je šlo za individualno in družinsko specifičnost selitve. Ker pa je vsaka selitve sama po sebi individualno dejanje, čeprav je lahko umeščena v nek selitveni val, pomembnosti socialne mreže tudi v našem primeru ne moremo oporekati.

NASELITEV IN ZAČETKI ŽIVLJENJA V ARGENTINI

Francevo pismo se začne z osebnim doživljanjem in utemeljevanjem družinskih vezi, nato pa nadaljuje opisovanje družbenih razmer v Argentini:

Že dolgo časa je minilo od kar vam nisem nič pisal zato je sedaj vam moram spisati par vrstic. V začetku teh mojih vrsticah vam pošiljam na tisoče pozdravov in poljubov. Saj mi ne boste zamirili kjer vam nisem toliko časa pisal saj sem spisal že več pisem pa poslal jih nisem kjer si sem mislil kaj vam bom slabosti kjer sam znam da jih imaste zadosti tako sem jih rajši raztrgal (F. Vrabec 2. 7. 1929).

Pismo ni bilo napisano takoj po prihodu v novo deželo, vendar dovolj dobro odsluži začetke življenja v tej južnoameriški državi. Argentina je po prvi svetovni vojni precej spremenila podobo imigraciji prijazne, ekonomsko prosperitetne in dokaj liberalne države. Že pred vojno so se med številno migrantsko populacijo začele pojavljati socialistične in anarhistične ideje. Leta 1919 je izbruhnila splošna stavka in razširile so se demonstracije, ki pa jih je vlada krvavo zatrla. Ob sedemsto smrtnih žrtvah in več kot dva tisoč ranjenih se je dogodek zapisal v zgodovino kot »La Semana Tragica« oziroma »tragični teden« (Sáenz Quesada 2001: 461). V dvajsetih letih je družba s političnim populizmom, z uvajanjem patriotskih mitov prek šolskega sistema, obveznim služenjem vojaškega roka in s praznovanjem »domovinskih praznikov« postajala vse bolj homogena, v isti sapi pa tudi bolj konfliktna. Priseljenci so se začeli vključevati v politične dejavnosti in posegati po višjih mestih v industrijskih obratih in tudi na drugih delovnih položajih (Devoto 2003: 364).

Ekonomija je bila po prvi svetovni vojni nekoliko uspešnejša, a ni uspela doseči predvojnega uspeha, ko se je argentinsko gospodarstvo po nekaterih kazalcih uvrščalo med najboljše na svetu (Sjekloča 2004: 47). Kljub navidezni uspešnosti je bilo bogastvo v predvojni Argentini neenakomerno razporejeno in veliko imigrantov ni uživalo blaginje (Devoto 2003: 309). Mirna in razmeroma ugodna dvajseta leta so se z gospodarsko krizo leta 1929 dokončno iztekla. Večina primorskih priseljencev, med drugim tudi pisec našega pisma, je prišla leta 1928, ko se je čas neobremenjenega življenja poslavljal in sta bila kriza ter z njo prvi vojaški udar praktično že pred vrati.

Franc je v Argentino, tako kot večina priseljencev, prišel s pomočjo mreže znanstev. Odločil se je poskusiti srečo v Argentini, kjer ga je čakal brat Albin, oba pa sta vstopila v stvarnost, ki se ni prav močno razlikovala od domače. Res je, da sta se znašla na povsem novih tleh, na katera ni stopil nihče od njunih prednikov, vendar je bil prostor, kamor sta prišla, napolnjen s sovaščani in z drugimi znanci. Naselila sta se v »najemniških sobah« (conventillos) na Paternalu, kjer je svojo pot začela večina Slovencev (poleg v okrajih Colegiales in Chacarita), ki je v tistih časih prišla v Argentino (A. M. E. Y. »Triglav« 1981: 44). »Naši so bli najbolj prjatlji s Planinkni in s Tomškovmi« (J. Vrabec 7. 9. 2006), je v intervjuju pojasnil Jože Vrabec tesne stike, ki sta jih njegova brata negovala tudi na tujem. V hiši Tomškovih⁶ se je vsako nedeljo zbralo

6 Od družine Tomškovih se jih je v Argentino izselilo pet: Ernest, Leopolda, Olga, Avgust in Marija. Olga se je že v Pliskovici poročila z Avguštinom iz družine Matijevih in je ob svojem odhodu s seboj vzela tudi svojega otroka, Silvo. Na začetku so še vsi živeli v skupnem bivališču v soseski Paternal. Avguštin Štolfa, Olgin mož, prav tako iz Pliskovice, je sodeloval pri organizaciji prve slovenske šole v Argentini in najbrž tudi v Južni Ameriki. Šola in pevski zbor, ki je nastal v naselju Villa Devoto, pomenita začetek vzpostavljanja društva Naš dom (A. M. E. Y. »TRIGLAV« 1981: 44–45).

veliko Pliskovljanov. Skupno bivališče v soseski Paternal je tako postalo prizorišče druženja in igranja tombole, znane družabne igre, ki je bila razširjena že v Pliskovici.⁷

V prvih letih po prihodu so vezi vaške skupnosti še vedno pletle trdne stike med njenimi člani. Franc in Albin sta naletela na razvito mrežo domače solidarnosti, ki pa nikoli ni bila tako homogena in enotna, kot so jo želeli naši sogovorniki predstaviti ali kot bi lahko razbrali s površinskim branjem pisem. Vas ni bila nikoli srečna »Gemeinschaft«, sredobežne tendence v obliki nesporazumov zaradi različne socialne pripadnosti, sporov posesti, preprirov in nesoglasij so bile vedno del njenega funkcioniranja, prav tako kot je bila to težnja k enotnosti.

Družina Betni je izhajala iz vrst kajzarjev, in čeprav se zdi, da je sklepala zaveznitva z vsemi vaščani, ni tako. Pozorno je treba prisluhniti le namignjenim besedam Jožeta, ki je svoje stike z eno premožnejših pliskovskih družin in njenimi dekleti takole opredelil:

Jaz sem že dvoril dekletom takrat, kaj je bilo, sedemindvajsetega leta, jaz sem imel štirinajst, petnajst let, k dekletom smo hodili tudi po orehe. Ampak, potem pa je bilo tako, dekleta so izhajala iz premožne družine in fant iz kajzarske družine si pri njih ni upal snubiti. [...] Mi Betni smo imeli komaj eno kravo in tele; jaz (nekoliko daljše ponavljanje polglasnika), skupaj morajo približno enako premožni (J. Vrabec 7. 9. 2006).⁸

Usoda pliskovske skupnosti na argentinskih tleh nam ni znana v vseh podrobnostih,⁹ vendar smo na podlagi intervjujev izvedeli, da so se v prvi generaciji izseljencev le redki poročali zunaj slovenskega etničnega kroga. Med njimi pa so bila prav dekleta iz omenjene družine, ki:

se niso družila s Slovenci, poročena so bila s Španci (najbrž z Argentinci oz. s pripadniki večinske imigrantske družbe, op. M. Z.). Tudi s Kristino, ki je tja prišla kasneje in ki je bila tu (v Pliskovici, op. M. Z.) moja prijateljica, se tam nisva srečali. Nekajkrat sva se slišali po telefonu in tedaj se je ona želela srečati z mano, jaz pa z njo, vendar ji starejše sestre niso dovolile, da bi se dobila z menoj. Niso želele, da bi jo peljala v kako slovensko društvo (M. Vrabec, 14. 9. 2007).¹⁰

Zapisali bi lahko, da so se zareze, ki so ločevale Pliskovljane doma, v tujini ohranile in vplivale na medsebojne stike in življenjske izbire posameznih pripadnikov skupnosti. Navezava medsebojnih stikov in možnost sklepanja porok veliko pove o možnosti vključevanja v družbo. V primeru primorskih Slovencev je šlo zlasti za mlade moške priseljence, ki so se tudi zaradi odsotnosti zadostnega števila domačih deklet odločali za poroke z domačinkami. Seveda so jih gnali ob tem drugi motivi, na primer boljše vključevanje v argentinsko družbo, vendar je, kot lahko vidimo, prihajalo tudi do porok med slovenskimi

7 Marija Colja je v svojih spominih o svoji družini in življenju v Pliskovici nekoč takole zapisala: »cele večire smo štrikale, vaški fantje so se zbirali, igrali smo tombolo, bilo je zelo zabavno in veselo, tako je bila naša hiša zelo obiskana« (Marija Colja, neobjavljeni spominski zapisi; hrani M. Colja).

8 Odloemek Jožetovega pripovedovanja pove veliko o mišljenjskih shemah in poročnih izbirah nekega podeželana v tem času. Seveda podatek ne more biti reprezentativen, pa tudi podeželja nikakor ni mogoče strogo ločevati od urbanega sveta, posebej ne v tem času. Je pa vsekakor indikativen in kaže na pomembnost gospodarskih koristi in ohranjanja statusa s poročnimi strategijami (Verginella 1996: 201–203). V besedilu – zaradi prostorske stiske in večje razumljivosti – ne navajam dobresednih citatov iz intervjujev, ampak interpretacije povedanega v knjižnem jeziku.

9 Treba bi bilo pregledati arhive popisov prebivalstva, potniških seznamov in matičnih knjig v buenosaireskih arhivih, vendar bi bilo to zahtevno opravilo, saj argentinski migracijski uradi niso registrirali narodnosti, ampak samo državljanstvo.

10 Marija Štolfa, poročena Vrabec. V Argentino je prišla leta 1937 na povabilo svojega strica. Poznala je skorajda vse Pliskovljane in bila posebej s Tomškovimi (pripadala jim je žena njegovega strica) v tesnih stikih. Nikoli pa ni bila v stikih z dekleti omenjene družine in nekim drugim Pliskovljanom, ki se je prav tako poročil z domačinko.

ženami in argentinskimi moškimi, kar tudi v medvojnih razmerah bolj homogene, a tudi bolj konfliktne družbe ni bilo prav pogosto.¹¹

Prihod na argentinska tla ni minil samo v znamenju povezovanja s sorodniki in z vaščani ter ohranjanja stikov z domačini. Tudi domačo družino je zanimalo, kako so se znašli drugi Pliskovljani, zato je Franc zapisal: »Druge vaščane vidim tudi dosti krat samo Franceta Bndljevega ga nisem še vidil druge skoraj vse sem videl in Sedaj se poroči Karlo Čerlinov vzame Marijo Uakčevo družega ne vem« (F. Vrabec 2. 7. 1929). Franc Vrabec drugega očitno res ni vedel. Soočal pa se je s težavami, ki so pestile večino primorskih priseljencev. Eden izmed bolj aktivnih priseljencev je takole opisal občutek ob prihodu: »Bili smo nekaki brezpravni elementi. Jugoslovani nismo bili, še manj Argentinci. Italijani pa tudi nismo hoteli biti, čeprav smo imeli njihov passaporto« (Kurinčič 1964: 216–217). Ne moremo vedeti, ali so vsi priseljenci delili občutek s Kurinčičem, lahko pa zapišemo, da so bila prva leta po prihodu za večino zelo težka, tudi za Franca in Albina:

sem delal skoraj dva meseca pa sem delal skro zaston pa še tistega nič ni plačal in sem bil prisiljen iti proč od njega in kadar sem šel proč od njega sem pohajal 29 dni kjer si nisem mogel udobiti družega dela, in po tolikem času si sem vendar udobil družega gospodarja ki sem delal že 8 dan pri njemu v teh 8 dneh je pokazal prav dober pa nevem kaj bo za naprej (F. Vrabec, 2. 7. 1929).

Argentina je leta 1929 začutila izjemno močan udarec gospodarske krize. Njena ekonomija, ki je v veliki meri temeljila na izvozu primarnih agrarnih proizvodov, je ob padcu cen pridelkov na svetovnih trgih doživela popoln kolaps. Deset latinskoameriških držav je doživelo državni udar, med drugim tudi Argentina, kjer je oblast prevzel general Uriburu (Hobsbawm 1994: 105; Sáenz Quesada 2001: 488–500).

Slovenskim priseljencem, pa tudi drugim, je bilo kakršno koli delo izjemno težko dobiti, ko pa so ga dobili, se je zaradi odsotnosti delovnopravne zakonodaje začelo pravo izkoriščanje. Za mnoge so ta leta pomenila čas menjavanja služb, iskanja kakršnega koli, še tako začasnega dela, in brezupnega tavanja ter celo beračenja in brskanja za hrano (Sjekloča 2001: 101–102).

Zgodbe velikega dela primorskih Slovencev o obdobju, ko so brezupno garali, računajoč na dober zaslužek, so podobne. Skorajda nemogoče je bilo, da bi nadaljevali poklic, ki so imeli že doma. Veliko priseljenskih skupnosti je v Argentini uspelo monopolizirati določen sektor dela, Slovenci pa se niso znašli, ker so bili številčno prešibki, neenotnega socialnega izvora, ideološko razcepljeni in niso imeli začetne materialne moči. Tako Franc kot Albin sta, preden sta se znašla, zamenjala veliko zaposlitev. Ob zidarskih delih konec dvajsetih let sta se poskusila v tem poklicu, nato pa sta začela menjavati službe. Albin je bil nekaj časa pomorščak, vozil je mestni tramvaj (to delo je opravljalo precej Slovencev, tudi Pliskovljanov), nazadnje pa je dobil delo kot telefonist, kar je ostal do upokojitve. Franc je uspel dobiti dobro plačano delo v tovarni, vendar je kmalu po tem, ko si je uredil življenje, zaradi bolezni nenadoma umrl.¹²

Albin je v Argentini pričakoval svoje dekle Emilijo, doma s Kosovelj, sosednjega zaselka Pliskovice. Ko je prišla v Buenos Aires, se je takoj odpravila služiti k družini. Delo je opravljala mesec in pol, potem pa se je pridružila Albinu:

In sicer njegove razmire, so tako zahtevale. Kjer kakor je ostal toliko časa brez dela, ter na gostilni se hranil, drugim dajal prat in šivat, prišlo bi ga, preveč stat, bi ne mogel zmogovati z denarjem, kar ga je imel prihranjenega. Vzrok je, ker jaz še nisem let dopolnila, in drugič ko še nimamo denarja za potrebna sredstva. Ampak upam, da

11 Poroče so namreč pokazatelj neformalne socialne asimilacije, in znano je, da se ženske pogosteje poročajo v okviru svoje etnične skupine kot pa moški. Število njihovih socialnih stikov je manjše, prav tako so bolj omejeni tudi njihovi prostori sociabilnosti (Devoto 2003: 331–335).

12 Zanimivo, da študije, ki temeljijo na arhivih tovarn, kažejo na visoko raven etnične koncentracije med delavci, ki so prišli na podlagi sorodstvenih ali vaških vezi (Devoto 2003: 366–367).

se ne bo dolgo mudilo ko si napravimo potrebno, ter se poročimo, da napravimo kar krščanska vira zahteva (M. Širca, nedatirano, med 1929–1931).

Razmere so bile torej tiste, ki so zahtevale, da se je Milka pridružila svojemu bodočemu soprogu, kljub temu da je bilo to v nasprotju z vero in s tradicijo. Vprašanje njenih odločitev razkriva tudi mišljenjske sheme človeka, ki izhaja iz ruralnega okolja, a ni več v preživetvenem in najbrž tudi simbolnem smislu vezan na zemljo. »Podeželskosti« in »prežetosti s tradicijo« ne moremo označiti za kategoriji, s katerimi bi lahko razumeli njegov miselni svet, saj ruralno okolje ni nikoli živelo v izoliranem svetu in tudi ni bilo negibno (Levi 1995: 9–11). Vrnimo se zdaj k Milkini nameri, da se pridruži Albinu, kar ni bilo nič nenavadnega za skupnost primorskih izseljencev v Argentini:

Še prej, ko sva skupaj prišla, mi je Albin dobil v eni fabriki za šivat, tako da zaslužim za hrano, ter za stanovanje, ker on ni že toliko časa nič zaslužil, in ravno radi tega, ni imel niti veselja Vam pisati, večkrat sem mu rekla, da zakaj ne toliko časa piše, pa odgovoril mi je da kaj Vam bo sama pisava, ko poslati ne more nič (M. Širca, nedatirano, med 1929 in 1931).

V težavnih letih so se vloge med spoloma pogosto obrnile. Ženske so kot kuharice, perice, služkinje lažje dobile delo pri premožnejših družinah, zaposlovale pa so se, kot vidimo, tudi v tovarnah (Ličen 1957: 99; Lukač 1958: 235).

VKLJUČEVANJE V ARGENTINSKO DRUŽBO IN VZDRŽEVANJE STIKOV Z DOMAČIM SVETOM

Albin in Milka sta postajala Argentinca, v novi deželi jima je bilo sprva sicer težko, vsaj v nekem obdobju pa se jima je godilo bolje, in tedaj nista pomišljala, da bi se vrnila v kraje, ki so trpeli za posledicami vojne in povojne obnove. Kot je pisal Albin leta 1953:

Pepi, kakor čitam v tvojem pismu, so pa zares slabe razmere vendar si človek ne more zaslužiti niti zase, pa kaj hočemo čakati moramo na boljše, to pa neznam kdaj bo prišlo [...] Do sedaj je še naj boljše tukaj v Argentini ne primanjkuje ne dela in ne jela in tudi straha ni, da bo prišla vojska seveda življenje je drago tudi tukaj (A. Vrabec 30. 10. 1953).

Peronistično obdobje z zahtevami po gospodarski avtarkiji, s populizmom in proglašanjem »pravične, suverene in svobodne« republike se je leta 1953 zaključilo in argentinsko gospodarstvo je s pocenitvijo izvoznih izdelkov na svetovnem trgu začelo nazadovati (Sáenz Quesada 2001: 540–579). Začetek petdesetih let, ko je Argentina v nasprotju z večino od vojne izčrpanega sveta beležila relativno blaginjo, se je izrazil tudi v Albinovih optimističnih pismih. Še v začetku sedemdesetih let, ko se je Peron zopet vrnil na oblast in Argentina ni bila niti zdaleč tako prosperitetna država kot včasih, je Albin pisal:

Tukaj v naši vasi gre še kar dobro dosti spremembe v političnih in tudi v družih razmirah, tudi tukaj je postala velika draginja kakor po celem svetu, ampak mi ne smemo se dosti jamirat ker naši fantje tukaj nam zmiraj kaj zvišajo najsibo delavske plače, in nam tatarim pa penzijo, tako da gre kar dobro naprej (A. Vrabec 25. 7. 1984).

Albin in Milka sta se torej spretno vključevala v argentinsko družbo. Že od svojega prihoda sta se morala soočiti z vsemi nevšečnostmi nove stvarnosti, ki je zahtevala neumorno delo za skromen dohodek. Kar najhitreje sta se skušala naučiti španskega jezika, da se nista uvrstila med osovražene *Polacos de mierda*,

proti katerim so bili naperjeni predsodki argentinske družbe.¹³ Med seboj sta se sporazumevala v slovenščini, veliko Pliskovljanov in drugih primorskih priseljencev je na slovenščino preprosto »pozabilo«, in tako so tudi med seboj, v želji po čim hitrejši vključitvi v argentinsko družbo, komunicirali v španščini. V času, ko so prišli, Argentina nikakor ni bila tista obljubljeni dežela svobode, ki bi si jo želeli. Že z vojaškim udarom leta 1930 je bilo delovanje socialističnega društva Ljudski oder utišano, preganjanje in sovražna nastrojenost pa sta se nadaljevala tudi v prihodnosti, zlasti v Peronovem času (Sjekloča 2001: 133). Francu se je ob zaključevanju pisma, poslanega leta 1933, na koncu morda samo naključno zapisalo: »Nasvidenje pa ne vem kedaj. Adios« (F. Vrabec 2. 3. 1933).

Drobni vrinki besed so sami po sebi indikativni, najbrž prav zato, ker so napisani s samim tokom misli, velikokrat nehote. V Albinovi in Milkini korespondenci česa podobnega ne zasledimo, opazimo pa lahko pri priseljencu, ki je v Argentino prišel kot eden izmed redkih vaščanov iz vasi pri Logatcu: »Draga sobrina (nečakinja o. p. M. Z.) [...] kako se vse spremeni da ni mogoče verjeti in sin embargo (kljub temu, o. p. M. Z.) je res querida (draga, o. p. M. Z.) [...]« (J. Leskovec, nedatirano).

Že besedice, izražene v pismih, lahko kažejo na prostore sociabilnosti akterjev, njihovo navezovanje stikov z domačini in prevladujočo uporabo določenega jezika v komunikaciji: »panevem več kako se piše slovensko ki tukaj ne govorimo slovensko kjer ni mogoče ki vsi govorio castellano« (M. Rebula, 11. 12. 1984). Zapisi Pliskovljanke Marije Okčeve datirajo v leto 1984, ko je bilo stikov med prvimi priseljenci vse manj in so mnogi že umrli. »Pozaba jezika« pri marsikom ni bila del dolgotrajnega procesa slabljenja vezi s pripadniki izvorne skupnosti in drugimi Slovenci, ampak stvar zavestne izbire, želje po boljši vključitvi v novo družbo in skrbi za status družine in otrok.¹⁴

Drugačen socialni svet je pripadnike medvojne migracije gnal k iskanju raznolikih strategij preživetja, kar se je zrcalilo v mnogoterih praksah, ki jih ne moremo razumeti zgolj s skrčenjem na polje jezikovne rabe. Slovenščina je bila sicer zamolčana pri velikem delu slovenskih migrantov, vendar so vsaj v našem primeru še vedno živele težnje po ohranjanju določenih izvornih značilnosti in utrjevanju stikov z domačini. Naši pisci so se v svojem mišljenju še vedno sprehajali doma in redno preverjali, kako je s preostalimi člani družine v domačem kraju in Franciji. V prvem pismu je Franca zanimalo: »Kako pa z našo Milko ali je šla pogledat kamor je služila prej kjer sem ji pisal eno pismo« (F. Vrabec 2. 7. 1929), in potem: »Kaj pravi pa naš Alfonz. Ali se še zmisli kaj name« (ibid.).

Po Francevi smrti so postale želje po ohranjanju in vzdrževanju stikov še močnejše. »Pišite, pišite ...« Tako so izgledala Albinova rotenja, ko je v dneh po tragični smrti svojega brata zapisal: »Pišitemi hitro kako se ima pa tata ali si je dosti pokvaril roko in drugi ste vsi zdravi? Kako pa Zora ona ne zna pisati v tem se je poročila šla je v Francijo in otroka imela pa ni dobra niti enega pozdrava poslati pišiteji da se ji prav lepo zahvalim« (A. Vrabec, 19. 10. 1940). Skrb za ohranjanje tesnih medsebojnih vezi se je ob prelomnih družinskih trenutkih povečala. Nova rojstva, krsti, obhajila, birme, poroke, šolska spričevala ali študijske diplome so bili tisti trenutki, ki so okrepili medsebojne stike in pokazali na to, da družina še vedno želi doživljati enotno življenje kljub ločenosti več tisoč kilometrov (Milharčič Hladnik 2009: 47).

Hrepenenje po ponovnem srečanju se je, kot smo že zapisali, prvič pa tudi zadnjič uresničilo leta 1970. Tudi po snidenju in Albinovi smrti, ki je sledila kmalu po prihodu v Argentino, se stiki niso prekinili. Zora je vedno skrbela za ohranjanje stikov z obema poloma družine, argentinskim in tistim v tedanji Jugoslaviji. Po Albinovem prihodu na argentinska tla je zapisala: »Okoli praznikov sem vdobila pismo iz Amerike. Milka pravi da so vdobili tvoje pismo, v katirem sem tudi jaz zapisala par vrstic med pocitini-

13 Predsodki so bili raznoliki (razširjen je bil antisemitizem, pojavljalo se je tudi protii talijansko in protiarabsko vzdušje) in niso izvirali samo iz argentinske družbe, temveč tudi s strani samih migrantov, ki so imeli v medvojnem času pomisleke o *criollos*, 'argentinskih domačinih' (Devoto 2003: 377–378).

14 Sjekloča (2001: 318) piše, da naj bi se velik del primorskih priseljencev asimiliralo že v prvi generaciji in da jih je veliko že kar takoj želelo pozabiti na svoj izvor. To je sicer res – le malo se jih je npr. udeleževalo društvenih aktivnosti, vendar so bila društva tudi pri drugih skupnostih organizacije tistih migrantov, ki so se v Argentini trdno ustalili in bili razmeroma ekonomsko uspešni. O invenciji identitete potomcev in analizi nediskurzivnih praks glej tudi Devoto (2003: 335).

cah« (Z. Knez, 19. 2. 1975). Dve leti po tem pismu pa je v pismu Jožetu takole sporočala: »Pisala sem Milki v Ameriko ki pričakuje mojega odgovora ob tej priliki sem pisala tudi Rozi plen., ker tudi nji poredkoma pišem« (Z. Knez, 4. 1. 1977).

Doživljanja naših akterjev postavljajo tradicionalne toge sheme o asimilaciji ali argentinski različici »crisol de razas« (pojem pomeni nekaj podobnega kot ameriški »melting pot« in izhaja iz diskusije o vlogi imigracije v Argentini) v povsem novo luč (Devoto 2003: 319–323). Gotovo je, da Franc in Milka spadata med tiste migrante, ki v novem svetu niso doživeli poloma. Kdor je doživel neuspeh, se je običajno odločil za vrnitev v domovino. Tudi med primorskimi Slovenci je bilo veliko takih, ki so se s prvo ladjo socialistične Jugoslavije Partizanko poslovili od Argentine. Njihovi motivi seveda niso izhajali samo iz neuspeha, ampak so vključevali tudi politične pritiske argentinskih oblasti, želje po gradnji nove, socialistične domovine, vrnitvi v domače, osvobodjene kraje, in mnoge druge, tudi povsem osebne motive.

Med povratniki je bilo tudi nekaj Pliskovljanov. Albin in Milka sta ostala. Kam bi lahko uvrstili njuno izkušnjo? Sta se asimilirala? Ta toga kategorija bi bila po naši presoji neustrezna, gotovo pa je, da sta postala precej običajna argentinska državljana, čeprav sta praktično ves čas ohranjala tesne vezi z domačimi in z Zoro v Franciji. Lahko bi zapisali, da sta se prav toliko kot Argentinka počutila tudi pripadnika domače družine, vaške srenje, ne nazadnje, kot kažejo zapisi v pismih, tudi Slovenca. Albin je narisal natančen zemljevid Pliskovice, podobno tudi mož Marije Vrabec, Rudolf, ki: »je naredil Anamariji na pesku podobe celotne Pliskovice, na mizi ji je prikazal kako so bile postavljene hiše v vasi« (M. Vrabec, intervju, 13. 9. 2006). Kam naj bi torej uvrstili Rudolfa, ki se je zanimal za domače razmere in skupaj z ženo poskrbel za dopisovanje s svojci, ampak: »Ko je prišel v Ameriko (informatorji so večkrat uporabljali generični izraz Amerika za označevanje Argentine, op. M. Z.), je rekel, da ne bo nikoli več šel v Slovenijo ali Jugoslavijo« (ibid).

Identitetne dileme v navedenih primerih niso bile enostavne, izpostavile pa so dejstvo, da se identitete oblikujejo v odnosih in da je možnost mnogovrstnih pripadnosti nedvoumna, aktivacija posameznih vidikov (osebnosti, vrednotnih sistemov, skupinskih kultur) pa odvisna od konteksta, v katerem so se posamezniki znašli (Harzig, Hoerder 2009: 112).

ZAKLJUČEK

Pričujoči članek prinaša nekaj izsekov iz življenja primorskih izseljencev predvojne generacije v Argentini. Čeprav gre za pisma pripadnikov ene same družine in osebne izkušnje nekaterih njihovih sovaščanov, menim, da imajo njihove življenjske poti določeno univerzalno veljavo. »Presajanje« iz vaške skupnosti v okolje vele mesta, kakršen je Buenos Aires, pravzaprav ni bilo tako zapleteno, kot je videti na prvi pogled. Vaščani prav gotovo, kot sem v besedilu že poudaril, in kot so ugotovili raziskovalci mikrozgodovine,¹⁵ niso bili priklenjeni na svojo vas, ampak so bili v svojem miselnem in intuitivnem svetu močno povezani z vsem sosednjim okoljem, ne nazadnje so mnogi med njimi imeli sorodnike v Trstu. Prihod v mesto na drugi strani oceana ni bil prelomen tudi zaradi tega, ker so se dejansko preselili v okolje, ki je bilo podaljšek domačega – čakali so jih sorodniki, sovaščani, prijatelji. Zdelo se je, da so se iz domače Pliskovice preselili v Pliskovico na drugi strani oceana.

V prispevku sem si prizadeval pokazati, da selitve v Argentino ni mogoče razumeti kratko malo kot preseka s starim svetom in spojitve izseljencev z novim okoljem. Z natančnim branjem pisemske korespondence, ki zna gradivo povezati v kompleksno mrežo, in upoštevanjem na videz nepomembnih fragmentov, kot tudi tistega, kar je ostalo nezapisano, je mogoče prodreti do spoznanj, ki prelamljajo s togimi predpostavkami vključevanja migrantov v novo okolje. Na ta način pridobimo vpogled v kompleksnost izbiri, s katerimi so se izseljenci srečali, in ugotovimo, da njihova življenja v novem okolju niso

¹⁵ Glej npr. delo Carla Ginzburga *Sir in črvi* (2010), kjer lahko na podlagi analize inkvizicijskih spisov ugotovimo, kam vse je segal poznan svet nekega furlanskega mlinarja iz 16. stoletja.

tekla po linearnih modelih, temveč so sestavljala pester mozaik raznolikih usod. Videti pa je tudi, da prelom s starim svetom, z domačimi v (nekdanji) domovini nikoli ni bil dokončen, celo tedaj ne, ko se med seboj vse bolj govorili »castellano« in so na slovenščino pozabili. V raziskavi so se pred nami razkrile raznolike poti migrantov, ki so vendarle imele znan zaključek, a so v vseh vmesnih fazah prežemale oba svetova: niso samo tisti, ki so odšli, pošiljali pisem na ono stran oceana in se čutili del nekdanje vaše skupnosti, tudi tisti, ki so ostali, so pošiljali pisma, pakete in se ne nazadnje tudi pogovarjali o svojih izseljencih v Argentini, svojih »Amerikancih«.

VIRI – DOKUMENTI ZASEBNIH ZBIRK

Zbirka pisem družine Vrabec; hrani Ljuba Vrabec, Koper.

Pismo Marije Rebula, hrani Boris Kosič, Pliskovica.

Pismo Joseja Leskovca, hrani Tatjana Štirn Leskovec, Kalce pri Logatcu.

LITERATURA

A.M.E.Y. »TRIGLAV« (1981). *Triglav, Historia y realidad*. Buenos Aires.

Arrango, Joaquin (2000). Explaining Migration: A Critical View. *International Social Science Journal* 52, 283–296.

Baily, Samuel, Ramella, Franco (1988). *One Family, Two Worlds, an Italian Family's Correspondence across the Atlantic, 1901–1922*. New Brunswick, London: Rutgers University Press.

Blumer, Herbert (1979). *Critiques of Research in Social Sciences: An Appraisal of Thomas and Znaniecki's The Polish Peasant in Europe and America*. New Brunswick, New Jersey: Transaction Books.

Devoto, Fernando (2003). *Historia de la inmigración en la Argentina*. Buenos Aires: Editorial Sudamericana.

Devoto, Fernando (2005). *Nacionalismo, fascismo y tradicionalismo en la Argentina moderna*. Buenos Aires: Siglo XXI de Argentina Editores.

Fitzpatrick, David (2006). Irish Emigration and the Art of Letter-Writing. *Letters across Borders, The Epistolary Practices of International Migrants* (ur. Bruce S. Elliot, David A. Gerber, Suzanne M. Sinke). New York-Hampshire: Palgrave Macmillan, 97–107.

Franzina, Emilio (2000 [1994]). *Merica! Merica! Emigrazione e colonizzazione nelle lettere dei contadini veneti e friulani in America Latina 1876–1902*. Verona: Cierre edizioni.

Ginzburg, Carlo (2010). *Sir in črvi: Svet nekega mlinarja iz 16. stoletja*. Ljubljana: Studia Humanitatis.

Goody, Jack (2003). *Evropska družina*. Ljubljana: Založba /^{*}cf.

Harzig, Christiane, Hoerder, Dirk (2009). *What is Migration History?* Cambridge/Malden: Polity Press.

Helbich, Wolfgang, Kamphoefner, Walter D. (2006). How Representative are Emigrant Letters? An Exploration of the German Case. *Letters across Borders, The Epistolary Practices of International Migrants* (ur. Bruce S. Elliot, David A. Gerber, Suzanne M. Sinke). New York-Hampshire: Palgrave Macmillan, 29–56.

Hobsbawm, Eric (1994). *The Age of Extremes*. New York: Vintage.

Judt, Tony (2007). *Povojna Evropa 1945–2005*. Ljubljana: Mladinska knjiga.

Kacin Wohinz, Milica (1995) Raznarodovanje primorskih Slovencev – dejavnik za izseljevanje. *Zbornik Kulturno ustvarjanje Slovencev v Južni Ameriki* (ur. Irene Mislej, Mirko Jurak). Ljubljana: Znanstveni inštitut Filozofske fakultete; Slovenska izseljenska matica, 23–31.

Kalc, Aleksej (2002). *Poti in usode: Selitvene izkušnje Slovencev z zahodne meje*. Koper – Trst: Zgodovinsko društvo za južno Primorsko, Znanstveno raziskovalno središče Republike Slovenije Koper, Narodna in študijska knjižnica Trst.

- Kalc, Aleksej (1997). Selitvena gibanja ob zahodnih mejah slovenskega etničnega prostora: Teme in problemi. *Annales* 10, 193–214.
- Kalc, Aleksej (1996). L'emigrazione Slovena e Croata dalla Venezia Giulia ed il suo ruolo politico. *Annales* 8, 23–60.
- Kurinčič, Franc (1964). Štirideset let slovenske naselbine v Argentini. *Slovenski izseljenski koledar*, 216–217.
- Levi, Giovanni (1995). *Nematerialna dediščina, življenjska pot piemontskega eksorcista iz XVII. stoletja*. Ljubljana: ŠKUC – Znanstveni inštitut Filozofske fakultete.
- Milharčič Hladnik, Mirjam (2009). Moje misli so bile pri vas doma: Poti prehodov v pismih. *Krila migracij, po meri življenjskih zgodb* (ur. Mirjam Milharčič Hladnik, Jernej Mlekuž). Ljubljana: Založba ZRC, 23–58.
- Passerini, Luisa (2008). *Ustna zgodovina, spol in utopija*. Ljubljana: Studia humanitatis.
- Purini, Piero (2000). Analisi dei dati statistici ufficiali Italiani riguardanti l'emigrazione dalla Venezia Giulia nel periodo 1921–1928. *Annales* 10, 171–190.
- Radetič, Peter (2005). Upravni, socialni in ekonomski položaj Slovencev v Trziču pod avstrijsko oblastjo (1814–1915). *Slovenci v Laškem* (ur. Vlado Klemše). SKŠRD Trzič, Gorica, 69–77.
- Sjekloča, Marko (2004). Čez morje v pozabo. *Argentinci slovenskih korenin in rezultati argentinske asimilacijske politike*. Celje: Fit media.
- Thompson, Paul (2000). *The Voice of the Past, Oral History*. Oxford in New York: Oxford University Press.
- Verginella, Marta (1996). *Ekonomija odrešenja in preživetja*. Koper: Zgodovinsko društvo za južno Primorsko, Znanstvenoraziskovalno središče Republike Slovenije.
- Verginella, Marta (2004). *Suha pašta, pesek in bombe: Vojni dnevnik Bruna Trampuža*. Koper: Univerza na Primorskem, Znanstvenoraziskovalno središče Republike Slovenije, Zgodovinsko društvo za južno Primorsko.

ZELEN KOT SLOVENIJA IN RDEČ KOT LJUBEZEN: SLOVENSKI JEZIK MED SLOVENCİ V PROSTORU NEKDANJE JUGOSLAVIJE

Metka LOKAR¹

COBISS 1.02

IZVLEČEK

Zelen kot Slovenija in rdeč kot Ljubezan: Slovenski jezik med Slovenci v prostoru nekdanje Jugoslavije¹

Prostor nekdanje Jugoslavije, tako prve kot druge, je poseben glede na druga okolja, v katera so se izseljevali Slovenci. V preteklosti je bila to širša domovina in slovenščina eden od »domačih« jezikov, ki so se v njej govorili. Slovenci, živeči v jugoslovanskem prostoru zunaj meja Slovenije, zaradi skupnega jugoslovanskega duha niso posvečali pozornosti svoji nacionalni identiteti in tudi ne oblikovali posebnega odnosa do svojega jezika. Ta je zato polagoma izginjal iz njihovega vsakdana. Pomena ohranjanja slovenščine kot enega temeljnih znakov slovenstva so se zavedli šele po razpadu Jugoslavije in osamosvojitvi Slovenije leta 1991. Začeli so ustanavljati društva, ki igrajo vlogo njihovega povezovalca, a hkrati tudi spodbujevalca učenja in rabe slovenščine med člani. Ta postaja izziv zlasti mladim, predstavnikom tretje in ponekod že četrte generacije, ki jim je večinoma tuji jezik, a se je učijo, ker jim odpira možnosti za študij in delo v Sloveniji.

KLJUČNE BESEDE: Slovenci v prostoru nekdanje Jugoslavije, prva Jugoslavija, druga Jugoslavija, slovenska identiteta, slovenska izseljenska društva, slovenščina kot tuji jezik

ABSTRACT

Green as Slovenia and Red as Love: The Slovene Language among Slovenes in the Territory of Former Yugoslavia

The territory of the former Yugoslavia, both first and second, is unique with respect to the other environments to which Slovenes have emigrated. In the past, this was just the broader homeland and the Slovene one of the "indigenous" languages that were spoken within it. Slovenes living in the Yugoslav area outside Slovenia in the common Yugoslav spirit didn't pay attention to their national identity, and thus also didn't create a special attitude towards their language. It therefore slowly disappeared from their everyday lives. They realized the importance of maintaining the Slovene language as one of the fundamental signs of Slovenian identity just after the dissolution of Yugoslavia and the declaration of independence of Slovenia in 1991. So they began to establish associations that nowadays play not just the role of facilitator, but also promoter of learning and using the Slovene language among members. This is becoming a challenge especially for young people, third and sometimes fourth generation emi-

¹ Mag. literarnih znanosti, asistentka z magisterijem; Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; e-pošta: meta.lokar@zrc-sazu.si.

¹ Članek je nastal v okviru projekta »Poklicne migracije Slovencev v prostor nekdanje Jugoslavije: Od naseljencev do transmigrantov«, šifra: J5-4200, ki ga financira Javna agencija za raziskovalno dejavnost Republike Slovenije.

grants, for whom it is mostly a foreign language, but they choose to learn it because it creates opportunities for them to study and work in Slovenia.

KEY WORDS: Slovenes in the territory of former Yugoslavia, first Yugoslavia, second Yugoslavia, Slovenian identity, Slovenian emigrant associations, Slovene as a foreign language

UVOD

Društvo Slovencev Republike Srbske »Triglav« Banja Luka, ki je eno od desetih slovenskih društev, delujočih v Bosni in Hercegovini, je med svoje dejavnosti v letu 2012 uvrstilo tudi sodelovanje svojih mlajših članov na dveh prireditvah ob 26. septembru – evropskem dnevu jezikov. Prva je potekala v banjaluški Narodni knjižnici, druga v tamkajšnjem Domu mladine, na obeh pa so se predstavili »mladi, ki govorijo različne jezike« (Hanuš 2012: 19). Slovenski prispevek v večnacionalnem okolju,² ki je ob tej priložnosti poudarilo predvsem svojo jezikovno pisanost, je bil dvojen; po eni strani je s poezijo Franceta Prešerna predstavil slovenski literarni kánon, po drugi pa se je inovativno poigral s slovenščino in z idejo, da ima vsaka njena beseda svojo barvo. Ob tem so mladi predstavniki slovenske skupnosti, učenci dopolnilnega pouka slovenskega jezika, med drugim razmišljali, katera barva bi najbolj pristajala besedi Slovenija in s katero bi obarvali slovenski jezik, ter to povezali v misel, da je ta, slovenski jezik namreč, »zelen kot Slovenija in rdeč kot ljubezen« (prav tam). S tem so ubesedili čustveno navezanost na domovino prednikov, z nastopom oz. obema nastopoma pa dokazali, da slovenščine ne dojemajo le kot del tradicije, ampak se zavedajo, da je sodoben in »živ« jezik, s katerim se lahko sproščeno in suvereno, hkrati pa tudi aktivno predstavljajo ne le v svojem ožjem, npr. društvenem, temveč tudi širšem življenjskem okolju.

Zgodba je primer dobre prakse učenja in rabe slovenščine zunaj meja Slovenije, natančneje, v prostoru nekdanje Jugoslavije. Ta je zaradi zgodovinskih okoliščin poseben glede na druga slovenska izseljenska okolja, saj je Slovincem vedno pomenil širšo domovino, po kateri so se sicer pogosto selili, a so te selitve bolj ali manj veljale za notranje. S tem je bil povezan njihov položaj v novih okoljih, torej v neslovenskih delih nekdanje Jugoslavije, v katerih so bili resda prišleki, a nikoli tujci, in bi zato pričakovali, da bo to vplivalo tudi na nezmanjšano rabo slovenščine; ampak ker se tej niti prej, v obdobju prve Jugoslavije, niti pozneje, v času Titovega bratstva in enotnosti, ni pripisovalo velikega pomena, se je začela izgubljati. Zaradi jezikovnega prilagajanja večini je slovenščino polagoma začela opuščati že druga generacija Slovencev, razseljenih po nekdanji Jugoslaviji,³ za tretjo oz. ponekod že četrto generacijo pa je kazalo, da se je ne bo niti začela učiti – delno zato, ker je ni več prepoznala kot del sebe in je zato ni posebej zanimala, delno pa tudi zato, ker so bile možnosti za organizirano učenje slovenščine v prostoru nekdanje Jugoslavije zunaj meja Slovenije vse do devetdesetih let preteklega stoletja bolj izjema kot pravilo.

Nasploh se je želja po povezovanju med Slovenci v omenjenem prostoru pojavila šele po razpadu skupne domovine in razglasitvi neodvisnosti Slovenije. Drugo za drugim so se v državah naslednicah SFRJ kot zadnje skupne (jugoslovanske) državne tvorbe začela ustanavljati slovenska društva, tista redka, ki so obstajala, pa so začela oživljati svoje dejavnosti, kar je pomenilo oživljanje slovenskega jezika in organizirano skrb za njegovo ohranjanje ne le pri starejših generacijah, temveč tudi med mladimi. Ti v zadnjih letih kažejo vse večje zanimanje zanj, kar je v primerih, ko je to pretežno povezano le z iskanjem ali ohranjanjem korenin, še vedno čustveno zaznamovano, vse pogosteje pa je izraz želje po odhodu v

2 Slovenci so ena od 17 nacionalnih manjšin, kolikor jih ob treh konstitutivnih narodih živi v Republiki Srbski oz. na območju celotne Bosne in Hercegovine (ob njih še Albanci, Črnogorci, Čehi, Italijani, Judje, Madžari, Make-donci, Nemci, Poljaki, Romi, Romuni, Rusi, Rusini, Slovaki, Turki in Ukrajinci).

3 Toporišič (1991: 63) ugotavlja, da je k temu, podobno kot kje drugje, precej pripomogla razpršena poselitev, posebej za omenjeni prostor pa je bilo značilno, da so se Slovenci, ki so se tam naselili za stalno, hitro asimilirali v drugojezično (večinsko) skupnost.

Slovenijo, na študij ali pozneje na delo. V ospredje vse bolj stopa ekonomska vrednost jezika, ki postaja, posebej če imamo v mislih Slovence oz. potomce Slovencev v prostoru nekdanje Jugoslavije, pomembno gibalno njegovega ohranjanja.⁴

V članku predstavljam, kakšen je bil odnos do slovenščine v prostoru nekdanje Jugoslavije v preteklosti in kakšen je danes, predvsem pa, kako je ta odnos vplival oz. kako vpliva na njen položaj oz. na upadajočo ali naraščajočo željo in potrebo govorcev po njeni rabi in ohranjanju. Dosedanja spoznanja drugih avtorjev (Menart 2001; Pogorelec 1983; Stabej 2010; Šabec 1994, 2002; Toporišič 1991; Wachtel 2003 idr.) dopolnjujem z rezultati empirične raziskave, ki poteka v okviru projekta »Poklicne migracije v prostor nekdanje Jugoslavije: Od naseljencev do transmigrantov«; tega od julija 2011 izvajamo na Inštitutu za slovensko izseljenstvo in migracije ZRC SAZU. V raziskavo so vključena slovenska društva, ki delujejo v večini držav naslednic SFRJ⁵ in imajo po naših ugotovitvah ključno vlogo pri ohranjanju slovenskega jezika med svojimi člani. Ker so pomemben, včasih celo edini vir informacij o Slovencih v njihovem prostoru, smo jih prosili za sodelovanje in jim v prvi polovici leta 2012 razposlali obsežen vprašalnik,⁶ s pomočjo katerega smo zbrali splošne podatke o njih, njihovem članstvu in aktivnostih, ohranjanju stikov z domovino, spraševali pa smo jih tudi, na kakšne načine vzpostavljajo socialne mreže v državi priselitve in v sosednjih državah (prim. Žitnik Serafin 2013: 41–52). V delu vprašalnika smo jim zastavili vprašanja o učenju in rabi slovenščine, pri čemer nas je posebej zanimalo, kako posamezna društva opredeljujejo svoje člane glede na znanje in govorjenje ter rabo slovenskega jezika v različnih govornih položajih, kateri jezik prevladuje v društvu, ali posamezno društvo organizira učenje slovenščine, v kakšni obliki, kako poteka pouk, kako pogosto, komu je namenjen, kdo poučuje in podobno. S predstavniki društev smo se srečali na treh delovnih posvetih,⁷ kjer smo govorili o njihovem sedanjem delovanju ter načrtih za prihodnost na različnih področjih, med drugim tudi jezikovnem. Sliko o stanju slovenščine med Slovenci v prostoru nekdanje Jugoslavije in njihovem odnosu do nje, ki je predstavljen v nadaljevanju članka, smo si ustvarili tudi s pomočjo obvestil in poročil o dogodkih ter s pomočjo zapisov o dopolnilnem pouku slovenskega jezika v društvenih biltenih in na spletnih straneh ter ne nazadnje tudi ob priložnostnih formalnih in neformalnih pogovorih z njimi.

POLOŽAJ SLOVENSKEGA JEZIKA V PROSTORU NEKDANJE JUGOSLAVIJE

Položaj slovenščine v prostoru nekdanje Jugoslavije zunaj meja Slovenije je poseben, saj slovenščina tam še pred dobrima dvema desetletjema ni bila tuji jezik. Ob dejstvu, da je slovenščina jezik z majh-

4 Slovenski jezik se sicer na najrazličnejših tečajih v svojih državah vse pogosteje učijo tudi Neslovenci s tega območja, ki iščejo delo v Sloveniji, v večjem številu zadnja leta npr. zdravniki. Po podatkih Centra za slovenščino kot drugi/tuji jezik, kjer izvajajo izpite iz znanja slovenskega jezika na osnovni, srednji ali visoki ravni, med kandidati prevladujejo prav »govorci (južno)slovenskih jezikov: na osnovni ravni bosanskega (30 %) in srbskega (19 %), na srednji hrvaškega (33 %) in makedonskega (20 %), na visoki srbskega (53 %) in makedonskega jezika (27 %)« (Ferbežar 2013: 42).

5 Razen na Kosovu, kjer se maloštevilni tam živeči Slovenci do zdaj še niso povezali med seboj.

6 Vprašalnik je obsegal 58 vprašanj, sestavili pa smo jih sodelavci pri projektu. Razposlanih je bilo 44 kopij vprašalnika, izpolnjenih in vrnjenih pa 41.

7 Uvodni posvet z naslovom »Multi-kulti: Izkušnje sedanosti – izzivi prihodnosti«, ki so se ga udeležili predstavniki društev iz Bosne in Hercegovine, Hrvaške, Makedonije in Srbije, je bil junija 2012 v Novem mestu. Drugi posvet, samo s predstavniki bosanskih društev Slovencev (»Društva izseljencev kot neizkoriščen potencial Slovenije v BiH«), je prav tako potekal junija 2012, in sicer v Banja Luki, tretji posvet, s predstavniki srbskih društev Slovencev (»Društva izseljencev kot neizkoriščen potencial Slovenije v Srbiji«), pa oktobra 2012 v Subotici. Pred iztekom projekta bomo izpeljali še podoben posvet s predstavniki slovenskih društev na Hrvaškem, s predstavnikom črnogorskega društva in s predstavniki makedonskih društev.

nim številom govorcev, ki si v večjih jezikovnih skupnostih – ne glede na to, kdaj in kje – niso mogli in ne morejo privoščiti enojezičnosti (prim. Toporišič 1991: 137–141), lahko njeno skorajšnje izginotje na obravnavanem ozemlju prej pripišemo odprtosti in bližini jezikov v stiku kot pa mejam, ki v preteklosti prostora nekdanje Jugoslavije niso delile tako ostro, kot ga delijo po letu 1991.

K opuščanju rabe slovenščine so v preteklosti najprej in najbolj pripomogle različne ideje o južno-slovanski in pozneje jugoslovanski (narodni) enotnosti; tem lahko sledimo od razmaha ilirizma v prvi polovici 19. stoletja, predvsem pa večino 20. stoletja. Jugoslovanski prostor je bil ves ta čas zaznamovan z vizijo skupnosti, ki bi preseгла kulturne, jezikovne, verske, zgodovinske in druge razlike, privrženci Jugoslavije pa so omenjeno vizijo skušali uresničiti na različne načine. Wachtel (2003: 11) ob tem kot eno pomembnejših poudarja kulturno politiko,⁸ ki si je takoj po drugi svetovni vojni še posebej intenzivno prizadevala ustvariti nadnacionalno jugoslovansko kulturo. Jezikovna politika kot njen bistveni del je še intenzivneje kot kdajkoli prej »delovala v smeri kreacije skupnega nacionalnega jezika, in ko se je to izkazalo za nemogoče, vsaj poenotenega srbohrvaškega jezika« (prav tam). Tovrstna prizadevanja so posledično vplivala tudi na rabo slovenskega jezika tako v takratni ožji kot širši domovini, torej tako v Sloveniji kot drugje po Jugoslaviji:

Slovenščina v svoji vlogi javne komunikacije ni segala čez meje slovenskega jezikovnega področja, srbohrvaščina pa je v Jugoslaviji tako pred drugo svetovno vojno kot po njej – sicer v različnih oblikah in obsegu – v marsičem dejansko funkcionirala kot javni jezik na področju celotne države, tudi v Sloveniji (Stabej 2010: 201).

Med pomembnejšimi razlogi za opuščanje materinščine so bili prav gotovo mešani zakoni, pogost razlog pa tudi izguba stikov z drugimi Slovenci (prim. Šabec 1994: 193). Kot ugotavlja Toporišič (1991: 138), je bilo sicer v Jugoslaviji zelo malo tistih, ki bi bili sposobni govoriti slovensko; pri tem ima v mislih prebivalce neslovenskega izvora na neslovenskem ozemlju, kot primer pa navaja, da celo profesorju slovenske književnosti na univerzi ni bilo treba znati jezika, v katerem je ta književnost napisana. Slovenščina (enako je bilo z makedonščino in albanščino) je bila v času socialistične Jugoslavije izključena s konferenc in srečanj, na katerih je npr. večina udeležencev govorila srbohrvaško, redko se je rabila v zveznem parlamentu v Beogradu, čeprav so bile na voljo možnosti za sprotno prevajanje v druge jugoslovanske jezike, redka je bila v okviru jugoslovanske diplomacije, neenakopraven položaj pa je imela tudi v JLA; srbohrvaščina je vse bolj postajala jugoslovanska lingva franca, ki so ji slovenski govorniki morali slediti ali pa niso bili razumljeni.⁹

Za še boljše razumevanje situacije, v kateri se je v drugi Jugoslaviji znašla slovenščina skupaj s svojimi naravnimi govorniki, ko so ti bodisi prostovoljno bodisi po dekretu migrirali na jug, je treba poudariti, da se je ideja jugoslovanske narodne enotnosti v tem času v veliki meri oblikovala in krepila tudi s pomočjo medijev; še posebej vplivna je bila televizija. Leta 1958 je bil oblikovan skupni jugoslovanski

8 Npr. uvajanje jugoslovanskega literarnega in likovnega umetniškega kanona, ki naj bi izražal zaželene poteze narodne enotnosti, in ustvarjanje novih literarnih in likovnih umetniških del, ki naj bi utelešala nek drugače definiran jugoslovanski vidik. Slednjega naj bi pomagala oblikovati izobraževalna politika, posebno na področju poučevanja književnosti in zgodovine v šolah (prim. Wachtel 2003: 11).

9 Toporišič (1991: 138–139) ob tem razmišlja o vprašanju, ki presega vprašanje vpliva jezikovne politike na jezikovno kulturo in uporabo slovenščine in je marsikdaj aktualno še danes, namreč, zakaj se »Slovenec [...] z jezikom svojega sogovornika muči celo v Sloveniji, čeprav bi se moglo pričakovati, da bi v tem primeru druga stran morala poskušati govoriti slovensko, že iz vljudnostnih razlogov«. Po njegovem mnenju (prav tam) se to v Sloveniji in povsod drugje dogaja »večinoma zato, ker Slovenec svojo (jezikovno in narodno) majhnost skuša rekompensirati tako, da kaže svojo razumsko »superiornost« nad drugimi; za te torej implicitno domneva, da so nesposobni naučiti se drugega /ali vsaj ne njegovega/ jezika. Slovenec je ponosen na to, da se je naučil tujega jezika (stopnja tega obvladanja se mu ne zdi zelo pomembna) in želi pokazati, da ni zmeraj manj kot drugi.« Ni torej vprašljiva moč nekega drugega jezika (v primerjavi s slovenskim), ampak predvsem pripravljenost zavedati se pomena lastnega.

televizijski program, in sicer kot plod sodelovanja Studia Ljubljana, Studia Zagreb in Studia Beograd.¹⁰ Slednji je pripravljaval informativni program za celotno mrežo, med drugim tudi osrednji TV-dnevnik, in imel tako »privilegirani položaj, ki se ga je dalo delno opravičevati z najustreznejšimi pogoji/razmerami za pripravo oddaje, z bližino zveznih ustanov in z najboljšimi povezavami z republikami in tujino, še bolj pa z željo zvezne politike, da bi nadzirala vsebino oddaje« (Prpič 2008: S95). Skupni program naj bi imel vsejugoslovanski značaj, a tako, kot so bile novice iz Slovenije v TV-dnevniku minimalno zastopane in predvajane z občutno zamudo ali pa jih sploh ni bilo, je bil tudi delež slovenskih oddaj v skupni programski shemi majhen. Leta 1962 je bilo tako npr. v Sloveniji mogoče spremljati približno 43 odstotkov programa v slovenščini, slovenskega programa drugje v jugoslovanskem prostoru pa le od 12 do 13 odstotkov (Prpič 2008: S100). Stremljenje k centralizaciji je doseglo svoj vrh, a tudi začetek konca, leta 1983, ko se je oblikovala zahteva po poenotenju vzgojno-izobraževalnih programov; v t. i. skupnih jedrih, po katerih bi bili oblikovani učni načrti in napisani učbeniki za vse predmete, predvsem pa zgodovino in zemljepis, naj bi bilo posameznemu jugoslovanskemu narodu namenjenega toliko prostora, kolikor ga je ta narod v odstotkih predstavljal med drugimi narodi. Zamisel je naletela na velik odpor predvsem v Sloveniji, kjer se je obenem sprožil niz pobud civilne družbe za spremembo politične ureditve v državi, za demokratizacijo in decentralizacijo.

Jugoslovanskemu nacionalnemu unitarizmu so se že precej pred tem, med prvo in drugo svetovno vojno, »vidno upirali zlasti številni kulturni delavci, jezikoslovci, kulturni zgodovinarji, družboslovci, pa tudi vsa napredna politična in kulturna javnost« (Pogorelec 1983: 17). Ko se je pozneje, v zgodnjih šestdesetih letih 20. stoletja, v prostoru celotne Jugoslavije »položaj slovenščine v javni rabi začel po malem, a zelo vztrajno še slabšati« (Menart 2001: 36), je bilo na pobudo Društva slovenskih književnikov objavljeno Pismo o jeziku¹¹ z apelom, da je za slovenščino treba skrbeti na vse načine. To naj bi bila sicer bolj »priložnostna politična floskula« (prav tam: 39), a ne glede na to je bilo pismo prva napoved velike »akcije za kulturo slovenskega jezika v javnosti« (Pogorelec 1983: 17) oz. znamenitega posveta z naslovom Slovenščina v javnosti, ki je bil leta 1979 v Portorožu. Na posvetu se je razpravljalo »o slovenskem jeziku v javnosti kot o družbenem in političnem vprašanju Slovencev, pomembnem za njihov obstoj in prihodnost« (prav tam). Medtem smo leta 1968 Slovenci končno dobili tudi osrednjo dnevnoinformativno oddajo v svojem nacionalnem jeziku. A če je bilo to dobro za utrditev položaja slovenščine v Sloveniji, in če so akcije, ki so opozarjale na položaj slovenskega jezika, že prinesle prve rezultate v okviru njegove formalnopravne uveljavitve,¹² se je slovenščina med Slovenci drugje po Jugoslaviji še naprej počasi, a vztrajno stapljala z okoljem in se izgubljala iz spomina njenih govorcev.¹³ Ti so, čeprav kot posamezniki povsod lepo sprejeti,¹⁴ v kontekstu skupne jugoslovanske politične, upravne, gospodarske in kulturne

10 Omenjenim trem centrom so se pozneje v okviru Jugoslovanske radiotelevizije pridružile tudi Televizija Skopje in Televizija Sarajevo (1961) ter Televizija Titograd (1965) (Prpič 2008: S100).

11 Pismo je 22. maja 1965 objavil Izvršni odbor Glavnega odbora Socialistične zveze delovnega ljudstva Slovenije.

12 Slovenščina je formalnopravno postala uradni jezik z ustavo Socialistične republike Slovenije iz leta 1974. S tem so bile dane možnosti za odločnejše uveljavljanje jezikovnih pravic, s specifičnim pomenom, ki ga ima slovenščina kot bistveni element nacionalne identitete, pa tudi oblikovan argument v procesu slovenskega osamosvajanja (prim. Kalin Golob 2001: 219).

13 Zaradi bližine Slovenije nekoliko manj intenzivno, a še vedno dovolj opazno med Slovenci, živčimi ob hrvaško-slovenski meji.

14 Slovenci so v novo okolje prinašali svoje navade in običaje in, kjer so poseljevali nerazvita območja, tudi napredek. Čeprav je bilo domačinom marsikaj pri njih nenavadno, so znali ceniti novosti, ki so jih kar nekaj tudi posvojili. Slovenske sosedo so ocenili kot mirne, poštene in delovne, in jih kot take z veseljem sprejeli medse, se je pa o njih oblikoval tudi kakšen negativen stereotip. Književnik, novinar in kritik Miljenko Jergović (2009: 209), rojen v Sarajevu mami Slovenki, je o tem napisal: »Živel smo v globokem prepričanju, da so Slovenci popolni antitalenti za nogomet. To je bila resda le ena od njihovih naravnih pomanjkljivosti. Povrhu so bili nadvse neduhoviti, maltretirali so nas z groznimi filmi in s še hujšimi televizijskimi dramami, ampak bog ne daj, da te je ekskurzija popeljala na Bled in so predte postavili ajdove žgance ali ajdovo kašo, kajti potem si prišel do sklepa, da ni nič čudnega, da so Slovenci takšni, če pa se hranijo s temi pomijami.«

nadvlade v širši domovini ostali »brez lastnega obraza in glasu« (Menart 2001: 276), s tem povezano pa tudi v očeh mednarodne javnosti – rahlo ironično – le »neugotovljiva sestavina v jugoslovanski državni mineštri, o kateri se je z nadudlano domišljavostjo poudarjalo, da imamo eno partijo, dvoje pisav, tri vere, štiri jezike, pet narodov in šest republik in da ljudje vendar krasno živijo v popolnem bratstvu in enotnosti« (Menart 2001: 275–276).

RABA SLOVENSKEGA JEZIKA V PROSTORU NEKDANJE JUGOSLAVIJE

Slovenci so v prostor južno od Kolpe odhajali že pred stoletji,¹⁵ iz različnih krajev po različnih poteh in opravkih, včasih samo začasno, pogosto za stalno, kot posamezniki ali v skupinah, bolj ali manj organizirano. Prvo množičnejše izseljevanje v omenjeni prostor se je začelo sredi 19. stoletja s sezonskim delom gozdnih delavcev, znani so tudi primeri sezonskega dela deklet, ki so se čez zimo na Hrvaškem zaposlovale kot predice. Obsežnejše in stalnejše selitve so se nadaljevale proti koncu 19. in v začetku 20. stoletja, povezane pa so bile predvsem z avstro-ogrsko okupacijo Bosne ter vzpostavljanjem njene administracije na okupiranem in pozneje anektiranem območju. Naslednji večji val je na jug vse do Makedonije med obema vojnoma zanesel Primorje, ki so bežali pred italijansko raznarodovalno politiko na jugozahodnem delu slovenskega etničnega ozemlja. Posebno poglavje v zgodbi o izseljevanju Slovencev v prostor nekdanje Jugoslavije je obdobje druge svetovne vojne, ko je nemška okupacijska oblast na Hrvaško, v Srbijo in Bosno deportirala številne prebivalce Gorenjske in Spodnje Štajerske,¹⁶ zadnji opaznejši val pa pomeni izseljevanje Slovencev po drugi svetovni vojni v prostor nekdanje Jugoslavije – v tem primeru prežeto z idejo medsebojne bratske pomoči jugoslovanskih narodov, najpogosteje usmerjeno na manj razvita območja ali v rudarske revirje nekdanje Jugoslavije (prim. Drnovšek 1995; Jovanović 2001; Koblar 2008a; Kržišnik-Bukić 1995, 2007; Škerl 1952).

Ne glede na to, v katero smer proti jugu so šli, odhod tja ne prej ne pozneje ni veljal za klasično izseljevanje in Slovincem nikoli ni prinašal občutka izgubljenosti v tujini (prim. Pelikan 2008: 7). Zavest o pripadnosti jugoslovanski skupnosti je večini dajala občutek varnosti in domačnosti; »občutek usodne vloge jezika za slovensko identiteto« (Stabej 2010: 179) se je med njimi izgubljal, kot se je njihova identiteta izgubljala v vseprisotnem jugoslovanstvu. Kjer se je naselilo večje število Slovencev, so sicer ustanavljali celo slovenske šole, tako npr. slovenski kolonisti v Vojvodini, ki so leta 1946 v Gudurici, pozneje pa še v Vršču, Veliki Gredi in Banatskem Plandištu ustanovili štiriletne osnovne šole. A ukinili so jih že sredi petdesetih let,¹⁷ glavni vzrok ob pomanjkanju slovenskih učiteljev pa je bil, da so slovenski otroci že govorili srbsko in niso več čutili potrebe po slovenski šoli (prim. Cevc 2001: 316). Skrb za ohranjanje slovenščine so prevzemala tudi slovenska kulturna ali prosvetna društva, a teh prav tako ni bilo veliko, in temu primerna je bila skrb za slovenščino. V zvezi s tem je kot ena redkih, še iz časa prve Jugoslavije, zabeležena kulturna dejavnost sarajevskega Slovenskega kluba:¹⁸

Aktivnost Slovenskega kluba je potekala v obliki več sekcij: dramsko-recitatorska, pevski zbor, likovna in druge. Posebej je bil znan pevski zbor, ki je imel redne vaje in nastope, na katerih so izvajali slovenske pesmi. Klub je

15 Prvi osamljeni popotnik, potopisec, plemič se npr. na območju današnje Bosne in Hercegovine v zgodovinskih virih omenja že v 16. stoletju (prim. Kržišnik-Bukić 2007: 20).

16 Večina teh se je po vojni vrnila.

17 Kar je bilo boljše kot npr. na Hrvaškem, kjer je prav tako izpričano ustanavljanje slovenskih šol, a je to ostalo bolj ali manj pri poskusih; uspelo jim je v Labinu, kjer je šola – pravzaprav le oddelek, v tamkajšnji osnovni šoli – delovala eno leto (1947/48), in na Reki, kjer je bila slovenska šola po dolgih prizadevanjih ustanovljena leta 1950 in je delovala dve leti (prim. Riman 2010: 146, 287–293).

18 Klub je bil ustanovljen leta 1910, velja pa za prvo uradno registrirano slovensko društvo v Bosni in Hercegovini.

imel tudi bogato knjižnico s slovensko literaturo, ki je prispevala k ohranjanju slovenskega jezika. Zelo pogosto so pripravili razne shode in svečanosti, na katerih so negovali ljudske šege in slovensko tradicijo nasploh. Na ta način so člani slovenskega kluba v Sarajevu, v oddaljeni Bosni, ohranjali košček svoje domovine – Slovenije (Dolinšek-Divčič 2001: 301).

Ob širokem in skrbno načrtovanem naboru aktivnosti, ki so praktično enake aktivnostim slovenskega društva, ki npr. deluje v Sarajevu skoraj devet desetletij pozneje, presenetli, ko beremo o mlačnem odnosu odbornikov Slovenskega kluba do ohranitve slovenskega jezika pri mladih. Ti so leta 1924 ob prvi konkretni pobudi po organiziranem poučevanju materinščine zapisali, da je obvezni pouk izključen, da pa se lahko vpeljejo zasebne ure slovenščine, ki jih bodo vodile sestre usmiljenke. Do uresničitve pobude verjetno ni prišlo (prim. Koblar 2008b: 350–351). Učenje slovenščine med mladimi je, tako v Sarajevu kot večinoma tudi drugje v prostoru nekdanje Jugoslavije zunaj meja Slovenije, postalo pomembno in se je začelo načrtno izvajati šele po letu 1991.

Ideologija bratstva in enotnosti, ki naj bi bila v času socialistične Jugoslavije temelj enakopravne politične skupnosti in je v omenjeni jugoslovanski skupni zavesti dobila skrajne razsežnosti, je v začetku devetdesetih let prejšnjega stoletja zaradi vzpona skrajnega nacionalizma v dveh največjih jugoslovanskih republikah, Srbiji in Hrvaški, pripeljala do razpada skupne države. Slovenci, živeči v nekdanjih bratskih republikah od Hrvaške do Makedonije, so naenkrat postali državljani tujih držav, odrezani od Slovenije.¹⁹ Proces zgovorno opisuje zgodba beograjskih Slovencev, ki so se, ker so živeli v »srcu Jugoslavije«, a s tem v novih razmerah tudi v centru merjenja političnih moči, znašli v še težjem položaju kot njihovi rojaki drugje po Srbiji in v drugih nekdanjih jugoslovanskih republikah zunaj Slovenije.²⁰

V stari in novi Jugoslaviji so bili do njenega razpada v novem okolju le eni od številnih priseljencev v prestolnico. Res je sicer, da so prihajali iz drugačnega kulturnega okolja, da njihovega jezika večinsko okolje ni razumelo, da niso imeli šole v maternem jeziku in da so bili zato v marsičem v podobnem položaju kakor izseljenci (obiskovali so verske obrede v slovenščini, peli so v zborih, ustanavljali so društva, obiskovali so gostilne, kamor so zahajali Slovenci ipd.), vendar so bili v svoji državi. Z osamosvojitvijo Slovenije leta 1991 so postali tujci, tako kakor Slovenci v drugih bivših jugoslovanskih republikah [...] Porušena je bila dotedanja usklajenost med njihovo državno in nacionalno pripadnostjo in identiteto, prejšnja sprejetost in dober položaj v večinski družbi sta se obrnila v svoje nasprotje (Ravnik 2010: 183).

Ne le beograjski Slovenci, temveč tudi drugi Slovenci v neslovenskih delih nekdanje Jugoslavije in njihovi potomci so z osamosvojitvijo Slovenije »zbistrili svojo etnično identiteto, slovenstva niso več mešali z jugoslovanstvom« (Žigon 2001: 6). Njihova nacionalna zavest je bila bolj kot kdajkoli prej postavljena pred preizkušnjo in njena ohranitev je dobila novo veljavo in pomen, predvsem pa se je med njimi začela porajati potreba po medsebojnem povezovanju. V prostoru nekdanje Jugoslavije so že v prvi polovici devetdesetih let preteklega stoletja, ponekod še v vojnih razmerah, drugo za drugim začela nastajati slovenska društva. Njihovo ustanavljanje se je z nekoliko manjšo intenzivnostjo nadaljevalo v drugi polovici devetdesetih let, največji zagon pa je dobilo v prvem desetletju novega stoletja.²¹ Do-

19 Slovenci v prostoru nekdanje Jugoslavije zunaj meja Slovenije so po letu 1991 opredeljeni kot izseljenci; izjema so tisti, ki živijo na robovih slovenskega etničnega ozemlja ob hrvaško-slovenski meji – predvsem v severni Istri, reškem zaledju, Gorskem Kotarju in Med(ži)murju, pa tudi v Obkolpju in Obsotelju – in so kot pripadniki avtonomne slovenske narodne skupnosti obravnavani kot zamejci (prim. *Slovenci v zamejstvu* ter o problematiki take delitve Žitnik Serafin 2003: 51).

20 Beograd, stičišče političnih, gospodarskih in kulturnih poti nekdanje Jugoslavije, je po letu 1991 doživel najhujše napade in sankcije mednarodne skupnosti – z njim vred pa tudi njegovi prebivalci.

21 V državah, ki so nastale po razpadu Jugoslavije, danes deluje 44 slovenskih društev: 10 v Bosni in Hercegovini, 16 na Hrvaškem (med njimi tudi za zdaj najmlajše društvo v prostoru nekdanje Jugoslavije, leta 2011 v Umagu ustanovljeno društvo Ajda), 14 v Srbiji (eno – društvo v Negotinu – je še v ustanavljanju), tri v Makedoniji in eno

gajalo se je sicer, da se je kdo spomnil svojih slovenskih korenin in se v slovensko društvo včlanil samo zato, da bi s tem lahko uveljavil svojo pravico do pridobitve slovenskega državljanstva, a ustanavljanje društev in pridobivanje članstva je vendarle pomenilo zavzeto vračanje k slovenski identiteti in tudi vračanje k slovenskemu jeziku, za katerega se je tako spet izkazalo, da je eden pomembnejših dejavnikov v kolektivnem občutenju slovenstva: da je materinščina, torej slovenski jezik, odločilnega pomena za ohranjanje in utrjevanje zavesti o pripadnosti svojemu narodu, slovenski knjižni jezik pa enoten za vse Slovence in jih kot tak združuje in povezuje, ne glede na to, od kod so in kakšno je njihovo domače narečje (prim. Arbitrer 2010: bns).

Skrb za slovenski jezik in z njim slovensko kulturo je po letu 1991 postala prednostna naloga slovenskih društev, ki delujejo v novo nastalih državah nekdanje Jugoslavije. Zapisana je v njihovih statutih in programih in se, kot je razvidno iz društvenih poročil, redno izvaja, in sicer v tesnem sodelovanju s pristojnimi ustanovami v Sloveniji.²² Med dejavnosti, ki spodbujajo in podpirajo ohranjanje jezika, društva uvrščajo npr. kulturne sekcije, od dramskih do literarnih, bralne in recitatorske krožke, izdajajo glasila, celo knjige, imajo svoje knjižnice, zelo aktivni so pevski zbori, ob tem pa ima večji poudarek kot kdajkoli v preteklosti učenje jezika. K dopolnilnemu pouku slovenskega jezika (oz. slovenskega jezika in kulture) v Bosni in Hercegovini, na Hrvaškem, v Makedoniji in Srbiji – v Črni gori pouka (še) niso organizirali – hodijo tako mladi, ki jim je slovenščina relativno nov jezik,²³ kot starejši člani, ki so slovenščino iz takega ali drugečnega razloga nehali uporabljati in so jo pozabili; morda jim je zaradi nerabe postala tuja, se pa še zavedajo svojih slovenskih korenin. Marsikdo želi svoje znanje samo osvežiti ali nadgraditi.

Znanje slovenščine med Slovenci v prostoru nekdanje Jugoslavije je zelo različno – kot ocenjujejo predstavniki društev,²⁴ vse od »slabega«, »kar dobrega«, »srednjega« ali »solidnega«, do »dobrega« in predvsem na obmejnih območjih na Hrvaškem celo »zelo dobrega«. Iz nekaterih društev poročajo, da večina članov slovenskega jezika ne obvlada dobro, ker se ga nikoli niso zares dobro naučili ali pa svojega znanja niso izpopolnjevali; ponekod mlajši člani slovensko slabo razumejo in še slabše govorijo, starejši pa »dobro, ko vzpostavijo komunikacijo«, nekateri znajo slovensko, vendar uporabljajo govor domačega kraja itn. V kar nekaj društvih pravijo, da veliko članov razume slovensko, malo pa jih slovensko tudi govori.

Raba slovenščine je raznolika tudi glede na govorne položaje, v katerih se znajdejo njeni govorniki. V slovenskem jeziku pogosto govorijo samo ob formalnih ali neformalnih srečanjih v društvih, redko se zgodi, da se člani med seboj slovensko pogovarjajo tudi takrat, ko niso v prostorih društva, in le včasih slovensko govorijo doma; ko se govori, se slovenski jezik meša z elementi lokalnega, večinskega jezika. To potrjuje opis jezikovne situacije v enem od slovenskih društev, ki delujejo v Srbiji:

Prepletata se slovenščina in srbsčina, odvisno od okoliščin in sogovorcev. Glede na število članov, malo je tistih, ki odlično govorijo slovenski jezik (to so starejše generacije, ki so prišle iz Slovenije, srednje generacije oz. prva generacija rojenih zunaj meja Slovenije ter Slovenci, ki so iz Slovenije prišli v zadnjih letih). Osnovni razlog temu so mešani zakoni [...], v katerih se soprožnika pogovarjata v jeziku družbenega okolja (srbsčini), a otroci se šolajo tudi na tem jeziku. Ostali, ki slovenščino govorijo povprečno dobro, se trudijo, da jo aktivno uporabljajo. Obstajajo tudi tisti, ki se jezika šele učijo in ga ne uporabljajo aktivno. Veliko je število slučajev, da slednji po-

v Črni gori; samo tri med njimi so obstajala že prej: v Zagrebu (od leta 1939), na Reki (od leta 1947) in s prekinitvami v Sarajevu (od leta 1934). Društev je več, kot jih je bilo kdajkoli v tem prostoru, k čemur prispeva tako naklonjenost večinskega okolja takšnemu povezovanju kot pomoč Urada Vlade RS za Slovence v zamejstvu in po svetu, preko katerega Slovenija društvom namenja materialno in moralno podporo (prim. Poljak Istenič 2010: 202).

22 Z Uradom RS za Slovence v zamejstvu in po svetu, Ministrstvom za izobraževanje, znanost in šport in Ministrstvom za kulturo, Zavodom RS za šolstvo idr.

23 Pogosto se predstavniki tretje ali četrte generacije potomcev Slovencev z jezikom staršev in starih staršev prvič srečajo pri dopolnilnem pouku slovenščine, le nekateri ga ob redkih priložnostih slišijo tudi doma.

24 Za oceno in opis stanja smo jih prosili v vprašalniku, razposlanem v okviru raziskave.

polnoma razumejo slovenski jezik, ampak ga ne uporabljajo aktivno ter iščejo, da se jim obračamo izključno v slovenščini, da bi vadili.

Na splošno je z rabo slovenščine enako tudi drugje v prostoru nekdanje Jugoslavije zunaj meja Slovenije, ne glede na to, ali je večinski jezik srbski ali kateri od drugih večinskih jezikov okolja, v katerem danes še živijo Slovenci in njihovi potomci.

SKLEP

Jezik je več kot le sredstvo sporazumevanja. Je bistvenega pomena za (učinkovito) delovanje družbe in za prenašanje kulturnih vzorcev iz generacije v generacijo, v življenju posameznika pa ima vsaj še identitetno razsežnost. Njegova raba zunaj meja »matične države« je izredno občutljivo in velikokrat s čustvi nabito vprašanje (prim. Šabec 2002: 7). Ni torej naključje, da sta glavna skrb slovenskih društev, ki delujejo v nekdanjem skupnem jugoslovanskem prostoru zunaj meja Slovenije, organizacija pouka slovenskega jezika ter ohranjanje in razvijanje slovenske kulture. S tem povezujejo vrsto drugih dejavnosti in vanje čim bolj vključujejo mlade. Zanje iščejo načine, kako jim čim bolj približati Slovenijo; organizirajo ekskurzije, obiske otroških in mladinskih poletnih šol in taborov v Sloveniji, kjer je to mogoče, pa navezujejo stike in sodelujejo z lektorati slovenskega jezika na domačih univerzah.²⁵ Na vprašanje, ali je za vse to dovolj motivacije, predstavnik enega od društev odgovarja: »Menim, da so otroci zelo zainteresirani, starši so v podporo in radi sodelujejo, dejavnosti, ki se izvajajo ob pouku, popestrijo delovanje celega društva.« Dejstvo je, da je treba, kot vsako dejavnost, tudi učenje in rabo jezika načrtno spodbujati, razvijati in nenehno nadgrajevati; dopolnilni pouk slovenskega jezika, ki je marsikdaj gibalo društva, nedvomno lahko naredi veliko, a ob tem, kot še pravijo v istem društvu, se je treba zavedati še nečesa: »Pomembno je v pouk vključiti starše in spodbuditi celotno društvo, da v lastnem domu govorijo slovensko. Prvi učitelji so vedno starši in stari starši in prva spodbuda vedno prihaja od doma.«

Zanimanje za slovenščino se je v prostoru nekdanje Jugoslavije povečalo, ko je Slovenija 1991 leta razglasila neodvisnost in leta 2004 postala članica Evropske unije. Slovenščina je s tem postala eden izmed njenih uradnih jezikov, kar ji je prineslo širšo prepoznavnost in novo vrednost. Če predvsem starejše generacije Slovencev, živečih zunaj Slovenije, ohranjanje slovenščine še vedno bolj ali manj dojemajo kot neko čustveno vrednoto, mladi glede na socialno, gospodarsko in finančno krizo, ki je na območju nekdanje Jugoslavije še večja kot v Sloveniji, v učenju slovenščine vidijo predvsem možnost za uspešno šolanje na slovenskih visokošolskih ustanovah, katerih diplome so v nasprotju z diplomami visokošolskih ustanov na območju nekdanje Jugoslavije priznane v Evropski uniji, in morda tudi za zaposlitev v Sloveniji ali kateri drugi članici Unije. Glede nacionalne pripadnosti so sicer del širše skupnosti, v kateri živijo, z njo se identificirajo, a tako vse pogosteje na svoj način, tako kot jih zanima, iščejo in odkrivajo tudi svoje slovenske korenine, predvsem pa jih počasi sprejemajo kot del sebe, kar pomeni, da bodo zavedanje o njih nekoč lahko prenesli na naslednje rodove.

25 Lektorati – vsi pod okriljem Centra za slovenščino kot drugi/tuji jezik Filozofske fakultete Univerze v Ljubljani – zaenkrat delujejo na Hrvaškem (Zagreb), v Makedoniji (Skopje) in Srbiji (Beograd, Novi Sad), pojavljajo pa se tudi želje in pobude za ustanovitev vsaj enega lektorata v Bosni in Hercegovini (Sarajevu in/ali Banja Luki) in lektorata v Črni gori. Njihovo vlogo pri ohranjanju slovenščine med Slovenci v prostoru nekdanje Jugoslavije bi bilo treba podrobneje raziskati, kajti očitno je, da ni zanemarljiva – če ne drugega, sodelovanje spodbuja in k ukvarjanju s slovenščino na najvišji ravni pritegne generacijo potomcev Slovencev, ki bodo v prihodnje lahko prevzeli aktivno vlogo v slovenskih društvih.

VIRI IN LITERATURA

- Arbiter, Slavko (2010). *Slovenci na Reki združeni v KPD »Bazovica«*. Reka: Slovenski dom – Kulturno prosvetno društvo »Bazovica«.
- Cevc, France (2001). Slovenci v AP Vojvodini (ZR Jugoslavija). *Slovensko izseljenstvo: Zbornik ob 50-letnici Slovenske izseljenske matice* (ur. Milica Trebše-Štolfa). Ljubljana: Združenje Slovenska izseljenska matica, 313–318.
- Dolinšek-Divčič, Marija (2001). Slovenci v Bosni in Hercegovini. *Slovensko izseljenstvo: Zbornik ob 50-letnici Slovenske izseljenske matice* (ur. Milica Trebše-Štolfa). Ljubljana: Združenje Slovenska izseljenska matica, 301–311.
- Drnovšek, Marjan (1995). Slovenski izseljenci na Hrvaškem do leta 1914. *Slovenci v Hrvaški* (ur. Vera Kržišnik-Bukić). Ljubljana: Inštitut za narodnostna vprašanja, 107–113.
- Ferbežar, Ina (2013). Izpitni center. *Center za slovenščino kot drugi/tuji jezik. Letno poročilo 2012*, 42–49, [http://www.centerslo.net/files/file/Zalo%C5%BEni%C5%A1tvo/LP%202012_za%20web\(1\).pdf](http://www.centerslo.net/files/file/Zalo%C5%BEni%C5%A1tvo/LP%202012_za%20web(1).pdf) (24. 6. 2013).
- Hanuš, Barbara (2012). Barva besed – evropski dan jezikov v Banja Luki. *Bilten Društva Slovencev Triglav Banja Luka* 12, 19, <http://www.udruzenjetriglav.com/images/BILTENI/bilten%202012.pdf> (14. 12. 2012).
- Jergović, Miljenko (2009). *Zgodovinska čitanka II*. Ljubljana: Sanje.
- Jovanović, Amalija (2001). Slovenci v Makedoniji. *Slovensko izseljenstvo: Zbornik ob 50-letnici Slovenske izseljenske matice* (ur. Milica Trebše-Štolfa). Ljubljana: Združenje Slovenska izseljenska matica, 319–327.
- Kalin Golob, Monika (2001). Jezikovnokulturni vidiki vključevanja Slovenije v Evropsko unijo. *Teorija in praksa* 28/2, 213–230, <http://dk.fdv.uni-lj.si/db/pdfs/tip20012KALINGOLOB.pdf> (27. 5. 2013).
- Koblar, Stanislav (ur.) (2008a). *Četrta stran trikotnika: Znameniti Slovenci in slovenska društva v Bosni in Hercegovini 1878–2000*. Ljubljana: Mladinska knjiga.
- Koblar, Stanislav (2008b). 110 let združevanja. *Četrta stran trikotnika: Znameniti Slovenci in slovenska društva v Bosni in Hercegovini: 1878–2000* (ur. Stanislav Koblar). Ljubljana: Mladinska knjiga, 334–455.
- Kržišnik-Bukić, Vera (2003). Slovenci v Hrvaški, Bosni in Hercegovini, Srbiji in Črni gori ter Makedoniji med preteklostjo in sedanostjo. *Traditiones* 32/2, 117–135.
- Kržišnik-Bukić, Vera (2007). *Slovenci v Bosni in Hercegovini skozi pričevanja, spomine in literarne podobe: 1831–2007*. Ljubljana: Inštitut za narodnostna vprašanja.
- Menart, Janez (2001). *Slovenec v Srboslaviji: Kulturno politični spisi*. Ljubljana: Knjižna zadruga.
- Pelikan, Zorko (2008). Knjigi na pot. *Četrta stran trikotnika: Znameniti Slovenci in slovenska društva v Bosni in Hercegovini 1878–2000* (ur. Stanislav Koblar). Ljubljana: Mladinska knjiga, 7–8.
- Poljak Istenič, Saša (2010). Pomen društev za izseljence: Društvo Slovencev Sava Beograd. *Srbi v Sloveniji, Slovenci v Srbiji* (ur. Ingrid Slavec Gradišnik, Dragana Radojčić). Ljubljana: Založba ZRC, ZRC SAZU, 195–215.
- Pogorelec, Breda (1983). Uvodno poročilo. *Slovenščina v javnosti: Gradivo in sporočila / Posvetovanje o jeziku, Portorož, 14. in 15. maja 1979* (ur. Breda Pogorelec idr.). Ljubljana: Republiška konferenca Socialistične zveze delovnega ljudstva Slovenije, Slavistično društvo Slovenije.
- Prpič, Marko (2008). Kako smo dobili slovenski TV dnevnik: 40 let dnevnika TV Slovenija. *Javnost – The Public* 15, S95–S112, <http://javnost-thepublic.org/article/pdf/2008/5/7/> (7. 6. 2013).
- Ravnik, Mojca (2010). Nekaj pogledov v preteklost in sedanost beograjskih Slovencev. *Srbi v Sloveniji, Slovenci v Srbiji* (ur. Ingrid Slavec Gradišnik, Dragana Radojčić). Ljubljana: Založba ZRC, ZRC SAZU, 167–193.
- Riman, Barbara (2010). *Slovenci v Gorskem Kotarju, Kvarnerju in Istri od leta 1918 do leta 1991*. Doktorska disertacija. Ljubljana: Filozofska fakulteta.
- Slovenci v zamejstvu*, http://www.uszs.gov.si/si/delovna_podrocja/slovenci_v_zamejstvu/ (14. 12. 2012).

- Stabej, Marko (2010). *V družbi z jezikom*. Ljubljana: Trojina, zavod za uporabno slovenistiko.
- Šabec, Nada (1994). Slovenščina v priseljenskem okolju. *Slovenski izseljenski koledar: Koledar za Slovence po svetu* 41, 190–193.
- Šabec, Nada (2002). Usoda slovenskega jezika med Slovenci po svetu. *Ustvarjalnost Slovencev po svetu: Zbornik predavanj / 38. seminar slovenskega jezika, literature in kulture* (ur. Boža Krakar Vogel). Ljubljana: Center za slovenščino kot drugi/tuji jezik pri Oddelku za slovanske jezike in književnosti Filozofske fakultete, 7–20.
- Škerl, France (1952). Nacistične deportacije Slovencev v letu 1941. *Zgodovinski časopis* 6–7/1952–1953, 768–797.
- Toporišič, Jože (1991). *Družbenost slovenskega jezika: Sociolingvistična razpravljanja*. Ljubljana: Državna založba Slovenije.
- Wachtel, Andrew Baruch (2003). *Ustvarjanje naroda, razbijanje naroda: Književnost in kulturna politika v Jugoslaviji*. Ljubljana: Center za slovensko književnost.
- Žigon, Zvone (2001). Stiki s Slovenci po svetu – kdo je kdo v Sloveniji. *Drevesa: Bilten slovenskih rodoslovcev* 8/3, 6–7.
- Žitnik Serafin, Janja (2013). Organiziranost, delovanje in prihodnji izzivi slovenskih društev v drugih delih nekdanje Jugoslavije. *Dve domovini/Two Homelands* 37, 41–52.

EDUCATION OF MIGRANT CHILDREN IN AN INTERNATIONAL PRIMARY SCHOOL PROGRAMME: COMPARISON WITH A SLOVENIAN PRIMARY SCHOOL

Franc CANKAR,^I Tomi DEUTSCH,^{II} Olga DEČMAN DOBRNJIC,^{III}
Stanka SETNIKAR CANKAR^{IV}

COBISS 1.01

ABSTRACT

Education of Migrant Children in an International Primary School Programme: Comparison with a Slovenian Primary School

This paper draws comparisons in the performance of an international and a Slovenian primary school, taking as its case-study a school in Slovenia which runs the two programmes side by side. There are statistically significant differences between the two sets of pupils' views on the quality of the lessons, the teaching staff and relations with their peers, with both groups identifying a lack of contact and co-operation with pupils from the other programme. There are also several more noticeable differences in the level of knowledge between the two groups, although these differences could not be established as statistically significant. We examine the international school programme, which was positively assessed by the parents of children attending the programme, in somewhat greater depth.

KEY WORDS: international primary school, Slovenian primary school, migrations, quality of education

IZVLEČEK

Izobraževanje otrok migrantov v mednarodnem programu osnovne šole: Primerjava s slovensko osnovno šolo

V članku primerjamo nekatere vidike uspešnosti mednarodne in slovenske osnovne šole. V študijo je vključena šola iz Slovenije, ki izvaja oba programa. Med učenci iz obeh programov obstajajo statistično značilne razlike v stališčih glede kakovosti pouka, učiteljev in glede sodelovanja z vrstniki. Obe skupini učencev ugotavljata manjšo prisotnost sodelovanja z učenci iz druge skupine. V znanju učencev iz obeh programov prihaja do nekaterih opaznejših razlik, katerih statistično značilnih razlik pa ni bilo mogoče dokazati. Nekoliko podrobneje analiziramo izvajanje programa mednarodne šole. Slednji je bil pozitivno ocenjen tudi s strani staršev učencev v tem programu.

KLJUČNE BESEDE: mednarodna osnovna šola, slovenska osnovna šola, migracije, kakovost izobraževanja

I Franc Cankar, PhD Kinesiology; National Education Institute of Slovenia, Poljanska 28, SI-1000 Ljubljana; franc.cankar@zrss.si.

II Tomi Deutsch, Sociology; National Education Institute of Slovenia, Trg revolucije 7, SI-2000 Maribor; tomi.deutsch@zrss.si.

III Olga Dečman Dobrnjič, PhD Human Resource Management; National Education Institute of Slovenia, Parmova 33, SI-1000 Ljubljana; olga.decman@zrss.si.

IV Stanka Setnikar Cankar, PhD Economics; Faculty of Administration, University of Ljubljana, Gosarjeva 5, SI-1000 Ljubljana; stanka.setnikar-cankar@fu.uni-lj.si.

INTRODUCTION

Migration is an integral part of life. While some authors (Luchtenberg 2004) define migration primarily as a political and economic phenomenon, others (Heckmann 2008; Josipovič 2012; Mlekuž 2010) examine it from the aspect of social cohesion and the stabilisation of democratic culture. Within these frameworks, migration is also an indispensable part of education policy and practice - in fact, we can say with certainty that education is a precondition for all other types of integration. Within the education process, immigrant children acquire a number of key skills, areas of knowledge and social ties that they need in order to integrate successfully into society. The results of a number of studies (OECD 2006; TIMSS 2007; TIMSS 2011; Bibby, Tan 2008; Heckmann 2008; Bešter 2009) show that pupils born abroad attain significantly worse academic results than their native-born peers; the reasons for this are various and complex, and the differences cannot be ascribed to differences in the abilities and efforts of the children themselves. Nevertheless, while the integration of immigrant children into the education system is becoming an ever more important topic for policymakers in all Member States of the EU, a number of authors (OECD 2006; Heckmann 2008; Vrečer et al. 2008; Bešter 2009; Schneeweis 2011) point out that there are a number of approaches to resolving the issue, with differences appearing not only between countries but within them as well. The results of several studies of immigrant children (OECD 2006; TIMSS 2007; TIMSS 2011; Bibby, Tan 2008; Heckmann 2008; Bešter 2009; Schneeweis 2011; Lesar et al. 2012) can help in the search for new solutions; therefore, in this study, we outline some of the aspects of evaluation of one specific but nevertheless interesting educational approach to migrant children attending international schools.

Slovenia has three private international schools (American, British, and French), as well as the International Department at the Danila Kumar state primary school. In addition to the national primary school program, the latter school conducts two accredited international programmes, the Primary Years Programme – PYP, and the Middle Years Programme – MYP (one international programme at two levels – the IB programme), which are run under the auspices of the International Baccalaureate Organisation (IBO), an international non-profit educational organisation. The private international schools offer programmes accredited in their own countries, while the International Department at the Danila Kumar Primary School offers an international programme accredited by the global network of IBO schools. Official accreditation of a programme means that it is recognised throughout the world, that a certificate obtained under that programme is valid everywhere, and that pupils can continue their education in similar (and national) programmes in other countries. The children of Slovenian nationals posted abroad and those of foreign nationals posted to Slovenia generally attend schools offering an international programme; they might, for linguistic, educational, security and other reasons, be unable to attend state schools in the host country (Mlakar 2012: 3). The transitions between different countries and cultures are socially and psychologically difficult for such children; they are therefore exposed to significantly greater demands than those placed on young people educated in the same system and in their mother tongue (*ibid.*).

Private international schools are funded in different ways (payment of fees by parents, donations, etc.). The Slovenian state provides partial funds for all children attending the international programme at the Danila Kumar Primary School, whether foreign or Slovenian nationals, with a portion of the school fees being paid by the parents. In addition to the enhanced programme (IB subjects, methods of work, teaching in the English language), all costs of textbooks, teaching materials, daily activities and excursions are included; children are required to bring only a pen, bag and slippers to school and obtain everything else from the school (*ibid.*). The international programme at the Danila Kumar Primary School also includes the children of Slovenian nationals who have lived and worked abroad and who have returned home temporarily. Their children are entitled to attend the international school during the period of their temporary return to Slovenia; this enables the children to enjoy a smoother transition, in terms of language and of curriculum, to another environment and, at the same time, allows them to

retain their ability to learn in the English language should the parents decide to move away again in the future. The school fees for children of Slovenian diplomats, which are under normal circumstances paid by the parents, are paid in equal shares by the Ministry of Foreign Affairs and the Ministry of Education, Science and Sport.

The central interest of this paper is the International Department, which has been in existence in Slovenia since the 1990s. Slovenia's independence and international recognition brought an increase in the number of foreign diplomatic, business, press and other representatives in Ljubljana who, along with other professionals, all remained in Slovenia for longer periods of time with their families. This gave rise, naturally, to the issue of the education of their children, for some of whom it was necessary to provide pre-school and school programmes in the English language. International school departments therefore began to operate at a Slovenian primary school (the so-called 'IB programme'), with education continuing within the grammar school (*gimnazija*) programme, upon the completion of which students ended their formal education and received an internationally recognized school-leaving certificate (*matura*).

The IBO International Department, which is located in Ljubljana, and which organises an international primary school programme, employs a process of education and work that is substantially different from that employed in Slovenian schools. The international primary school lasts eight rather than nine years, the teaching is conducted in English, and class sizes are smaller. Of the 125 pupils attending the international programme at the school, the majority are the children of foreign nationals living and working in Slovenia. In terms of content, the two programmes (national and international) have a great deal in common, with similar objectives and similar subject areas, albeit with certain specific differences. The curriculums of both programmes have a large number of common topics, but are distinct from each other primarily in terms of structure and the way pupil progress is recorded. Slovenian curriculums are more wide-ranging and detailed, and contain precisely determined standards of knowledge; those of the International Department take the form of activities and projects to a greater extent, with the knowledge that a pupil is meant to acquire being recorded by means of more broadly defined descriptive criteria. The greatest differences between the two programmes lie in the method of teaching and in the checking and assessment of knowledge. The Slovenian primary school is more focused on knowledge and on the imparting of information; fewer connections are made between subjects (Mlakar 2012: 3), and the psychosocial aspects of raising children through education are overlooked (Musek Lešnik 2011: 58). The basic characteristics of the IBO are a balanced core curriculum and proper monitoring and assessment of knowledge, which helps pupils develop (Beane 1990; IBO 2006; Hare 2010):

- an ability to learn how to integrate the knowledge and skills they acquire into real life, and to use that knowledge and those skills;
- responsibility for and a positive attitude towards their own studies, with an emphasis on continuing education and development, on learning how to learn, and on using different sources of information and knowledge;
- international and intercultural understanding, joint responsibility, and a sensitivity towards their fellow human beings and the environment;
- an ability to participate actively in local and world affairs.

High academic achievement and a good level of knowledge are not the only important aspects of the programme; there is also and above all the understanding of general concepts, the development of interdisciplinary skills and abilities, the development of a positive attitude towards learning and the world at large, and the creation of conditions that enable pupils to use everything they have been taught in a beneficial and creative way (Marshman 2010). The basic objective is for every pupil to develop in accordance with their own abilities and to become a responsible and active citizen. Teaching and all communications take place in the English language, with pupils from years one to eight learning Slovenian as the language of their host environment. Year five pupils choose between French and German as their second foreign language. The teaching approaches focus on methods of work that en-

courage the methodical, critical and creative acquisition of new knowledge and skills. A global perspective is fostered by directing and encouraging pupils to exchange the ideas and experiences they have acquired in different countries, to respect different perspectives, and to develop an acceptance of other cultures and religions. This is crucial for later life as well, as cross-border cooperation is becoming an increasingly important factor in establishing an environment that encourages business and enterprise. One study (Klun, Setnikar Cankar 2013) has shown that positive attitudes, language skills and common interests are the primary factors that encourage cooperation.

Although it can be seen from the chronology of the establishment and operation of the international school that a not-inconsiderable amount of effort has been invested in this process by both school management and the relevant institutions, a more stable systemic solution has still not yet been found – that is, the school's position in law is still not as secure as it could be. In some countries, international programmes have become part of the state school system (public international programmes); in others they have been established as private schools. In Slovenia, however, the status of the international programme has not been regulated by law; as a result, attempts to reach agreement on the position and co-financing of the programme have to be made anew every year. This wearying round of negotiations causes uncertainty for the school, although it is clear that Slovenia needs a high-quality international school. One needs to ask why the international school's legal status has not been finally and properly settled, despite the need and desire for such a settlement. Clearly, regulation of its status has opened up a whole host of systemic questions, including the language of instruction, precisely whom the programme is intended for, the status of the programme, the attainment of standards of knowledge that bear comparison with Slovenian school programmes, and whether it is a private or a state school. Some of the answers to these questions are given in this research; its findings could be useful in the process of formally regulating the status of the International Department.

DESCRIPTION OF THE RESEARCH

We collected the data for the research in the first half of 2011 from both primary school programmes conducted at the Danila Kumar Primary School: the international programme and the Slovenian primary school programme.

Purpose and objectives of the research

The purpose of the research was to become familiar with how the international programme at the Danila Kumar Primary School works, and to compare it with the Slovenian primary school programme that runs alongside it. The goals of the research were as follows:

- to determine the opinions of pupils in the international programme on their lessons, and to compare them with the opinions of pupils in the Slovenian programme;
- to test the knowledge of pupils in the international programme and compare it with the knowledge of pupils in the Slovenian programme;
- to determine the opinions of parents of pupils in the international programme regarding the way the school programme is carried out.

Research method and description of instruments

For the first objective, we sought the opinions of pupils in the international primary school programme regarding their lessons, comparing these opinions with those expressed by pupils in the Slovenian pri-

mary school programme. We used a survey method for this first objective. The questionnaire for pupils in the international programme consisted of three groups of questions (Biggs et al. 2001; Kember et al. 2004). The first group related to lessons and teachers, the second to integration within the school and the relationship between the primary school as a whole and the pupils in the international programme, and the third to the relationship between pupils in the international programme and those in the Slovenian programme. The pupils ranged their opinions on five-point scales, from 'not true at all' (1) to 'completely true' (5). The questionnaire for pupils in the Slovenian programme was similar in content to the questionnaire for the pupils in the international programme. After gathering the pupils' responses, we held interviews with the headmaster of the school and the head of the international programme in order to obtain a more detailed picture of some of the areas examined.

For the second objective, we tested pupils from both programmes across all three terms. We tested pupils in mathematics and environmental studies in the first term, in mathematics, society and natural sciences in the second term, and in mathematics, social sciences, natural sciences, and technical studies and technology in the third term. Pupils from both programmes took a written examination. The tests were in the English language for pupils in the international programme and in the Slovenian language for pupils in the Slovenian programme. The tests were prepared on the basis of a comparative analysis of the syllabuses of both programmes. A network diagram/specification table was designed showing that the tests included a set of tasks that varied in terms of form, content, level of difficulty and classification. The tasks were designed at three levels of classification; in formal terms, there was the alternative type, the selective type, the complementary type, short answers, and answers given in the form of graphic presentation. Teachers were given specific instructions.

For the third objective, we canvassed the opinions of parents of pupils attending the international programme. The parents' survey was conducted by staff at the school. The questionnaire was in English and was the same questionnaire used by the international school for self-evaluation purposes. The questionnaire focused on the level of cooperation between the school and parents, the provision of information to parents, and the opinion of parents on the programme and on the way the programme was carried out. The parents ranged their opinions on five-point scales, from 'strongly disagree' (1) to 'strongly agree' (5).

Description of the sample and the data collection procedure

We tested the first objective using the data collected from a sample of 44 pupils in the international programme (years five to eight) and a sample of 92 pupils in the Slovenian programme. The research covered all pupils in years five to eight in the international programme and one class from each year from years six to nine in the Slovenian programme. Both groups of pupils were surveyed in March 2011 using a printed questionnaire completed during class time. The response rate was very high – over 90%. We also tested a selected group of pupils from both programmes (second objective). We tested pupils from years two, five and eight of the international programme and from years three, six, eight and nine of the Slovenian programme. Between 6 and 13 pupils from the international programme and between 17 and 24 pupils from the Slovenian programme were given a series of individual tests. Although a 100% response rate could not be achieved owing to the absence of a number of pupils, the rate was nevertheless high (over 90%), giving the data a high degree of reliability. The tests were conducted in May 2011. In order to test the third objective, we surveyed all parents whose children were attending the international programme at the time the data was collected. Forty-nine parents were surveyed; most (58.3%) had one child at the school, 33.3% had two children at the school and 8.3% had three children at the school. Parents were surveyed using a printed questionnaire. They were surveyed in March 2011 during a parents' meeting. Based on the number of enrolled children, we estimate that the response rate for parents was over 75%.

Data processing procedure

The data obtained from the surveys of pupils and parents was processed statistically. The averages and the associated standard deviations for individual selected indicators (indicators from the pupils' questionnaire in which there were statistically significant differences according to programme were selected) and for structured variables (the sum of individual indicators from a specific group of contents) are calculated and presented. In constructing the variables, the indicators were first checked using the Cronbach's alpha measure of consistency. The results of the pupils' tests were also statistically processed. The average marks attained in an individual test are calculated and presented, along with the associated standard deviations. The differences between the averages (for the survey responses as well as the test results) for the pupils from the two programmes were verified using an appropriate t-test.

RESULTS

The data obtained in relation to the first objective (Tables 1 and 2) shows that pupils attending the international programme rated their lessons and teachers considerably higher than was the case with pupils attending the Slovenian programme. We found no statistically significant differences between the pupils from the two programmes in their assessment of the school as a whole, nor in their assessment of the level of contact and cooperation between the pupils within their respective programmes. Despite this, there were large and statistically significant differences ($t = 3.328$; $\text{sig.} = 0.000$) between the assessment of cooperation and contact with pupils in the other programme (between the variables shown in Table 1). Pupils from both programmes believed that they had greater contact with peers within their own programme than with pupils from the other programme at the school.

Table 1: Opinions of pupils from both programmes

Area (no. of indicators; Cronbach's alpha)	Slovenian programme			International programme			t-test	
	No. of pupils	Average	Standard deviation	No. of pupils	Average	Standard deviation	t	sig.
Lessons and teachers (16; 0.893)	92	3.77	0.53	44	4.12	0.54	-3.687	0.000
School as a whole (9; 0.821)	92	3.63	0.60	44	3.82	0.84	-1.357	0.180
Pupils from the same programme (3; 0.743)	92	4.02	0.69	44	4.22	0.85	-1.467	0.145
Pupils from the other programme (3; 0.657)	92	2.93	0.89	44	3.01	0.92	-0.521	0.603

The statistically significant differences between the pupils of the two groups regarding lessons (Table 2) appear chiefly in the assessment given to the help provided to pupils by teachers, cooperation with teachers in various projects, teachers' friendliness, pupils' ability to follow lessons without difficulty, whether lessons were interesting, whether teachers made appropriate connections between different subjects in class, and whether pupils were encouraged to solve problems themselves.

Pupils attending the international programme gave a high rating to the question regarding contact and cooperation with other pupils attending the international programme; the same did not apply to cooperation and social contact with those attending the Slovenian programme.

More detailed views and explanations were provided in the contributions of both headmasters at the school. Both were very specific in mentioning the numerous and wide-ranging forms of contact and cooperation between pupils from the two programmes at school, as well as their contact with the

Table 2: Opinions of pupils from both programmes (selected indicators)

Selected indicators	Slovenian programme			International programme			t-test	
	No. of pupils	Average	Standard deviation	No. of pupils	Average	Standard deviation	t	sig.
Teachers are friendly towards pupils.	92	3.83	0.673	43	4.21	0.638	-3.132	0.002
Lessons are interesting.	92	3.34	0.816	43	3.77	0.718	-2.964	0.004
Teachers encourage us to solve problems ourselves.	91	3.98	0.802	43	4.30	0.741	-2.237	0.027
We work with teachers on various projects.	91	3.35	0.993	43	3.95	0.754	-3.879	0.000
Teachers explain the subject in a comprehensible manner.	90	3.74	0.868	44	4.20	0.978	-2.762	0.007
Teachers help pupils in their study.	92	3.43	0.998	44	4.23	0.985	-4.351	0.000
Teachers make appropriate connections between different subjects in class.	91	3.42	1.023	44	3.95	1.011	-2.870	0.005
I can follow lessons without any difficulty.	91	3.74	0.917	44	4.18	0.691	-2.853	0.005
We frequently use various learning aids during class (books, magazines, computers, etc.).	92	3.72	1.113	43	4.16	0.974	-2.252	0.026
We are given the opportunity to explore during lessons.	92	3.22	0.947	44	3.95	1.011	-4.155	0.000
Pupils regularly take part in various competitions in different areas.	91	4.52	0.673	43	3.58	1.029	5.436	0.000
There are a lot of excursions, themed days, etc. organised for us.	92	3.10	1.038	44	4.27	0.899	-6.438	0.000
We take part in drawing up school rules and preparing school activities.	92	3.13	1.121	43	3.98	1.102	-4.108	0.000
Within our own programme, we cooperate with and help each other.	92	3.73	0.840	43	4.23	0.895	-3.182	0.002
We socialise with pupils from the other programme at the school during free time.	92	2.46	1.262	44	3.00	1.329	-2.310	0.022

narrower and wider local environment. They also gave reasons why closer contact and cooperation between pupils might be hindered:

“The obstacles to more thorough cooperation and contact between the pupils in the international programme and the other pupils at the school, as well as pupils from other primary schools, are exactly the same as the obstacles to cooperation between pupils in the national programme and those from other schools. First of all, high-quality lessons have to be provided within the syllabus, and the lack of funds also presents an obstacle. There are also organisational problems caused by the need to obtain the written consent of parents for every activity that is not part of normal classroom lessons” (headmaster of the school).

“I don't agree that contact and cooperation between the pupils of the two programmes is not good. Statistics don't always reflect the real situation. These are two organisational units in charge of conducting their own programmes. I believe that cooperation between the two departments is good, as is cooperation with other schools. We also work with schools abroad. The reasons why pupils and parents feel that contact and coop-

eration are not as good as they could be is that the curriculum in the international department is different and does not permit regular cooperation; the activity days at the international department are linked to that curriculum, so they don't always coincide with activities taking place in the Slovenian department; pupils attending the international programme do not speak Slovenian and some do not speak very good English; lessons take place across several separate buildings; many pupils from the international department do not live close to the school, so they cannot socialise after school; pupils attending the international programme stay for only a short period of time and so cannot establish deeper ties with other pupils; and many teachers in the Slovenian department do not speak English, which means that they cannot take part in activities" (head of the international programme).

One can confirm, on the basis of the interview held with the school heads, that the school does organise a fair number of different activities involving pupils from both programmes.

For the second objective, we present a comparison in the levels of knowledge of pupils from the two programmes. The results (Table 3) show that pupils from the international programme attained a higher average grade in mathematics, social studies, and natural sciences in the second term, and in social sciences, and technical studies and technology in the third term. Their Slovenian peers were better in mathematics and environmental studies in the first term, and in mathematics and natural sciences in the third term.

Table 3: Results of the tests by programme

Subjects by term (no. of points possible in the test)	International programme			Slovenian programme			t-test	
	No. of pupils	Grade Average	Standard deviation	No. of pupils	Grade Average	Standard deviation	t	sig.
Mathematics and environmental studies – 1st term (42)	6	32.00	4.147	17	34.18	4.334	-1.068	0.297
Mathematics – 2nd term (44)	7	29.71	6.317	22	23.64	9.683	-1.549	0.133
Mathematics – 3rd term (41)	12	22.42	6.585	21	26.19	7.600	-1.437	0.161
Society – 2nd term (30)	8	22.75	2.493	24	22.13	4.785	0.351	0.728
Social sciences – 3rd term (24)	13	13.23	4.400	22	12.00	3.008	0.983	0.333
Natural sciences – 2nd term (28)	8	20.56	4.246	23	18.50	4.151	1.204	0.238
Natural sciences – 3rd term (37)	13	15.85	6.022	20	17.83	4.736	-1.054	0.300
Technical studies and technology – 3rd term (18)	13	10.38	2.459	21	8.83	2.472	1.782	0.084

Despite the differences in the grades attained in individual subject areas, the differences in the averages are not statistically significant; this is chiefly the result of the small samples or the number of units compared. Differences do otherwise appear, and are greatest in technical studies and technology in the 3rd term.

For the third objective, we present the views of parents of pupils in the international programme. Parents rated all statements on cooperation between school, parents, pupils and others highly, generally with an average of '4' or above; the averages were also higher than '4' in all structured variables (Table 4). Parents believe that cooperation and communication with the school is good, and that they are provided with sufficient information; they also gave positive assessments of the programme and of the way the programme was conducted at the school. We can state that staff in the international programme (together with management) realise the importance of working with parents and discharge their tasks in this area well.

Table 4: Opinions of parents of pupils attending the international programme

Area (no. of indicators; Cronbach's alpha)	No. of parents	Average	Standard deviation
Cooperation between school, parents and pupils (6; 0.799)	45	4.19	0.524
Provision of information to parents (4; 0.791)	51	4.15	0.656
Communication with parents (5; 0.854)	51	4.42	0.517
Curriculum (5; 0.877)	49	4.38	0.544
Teaching (8; 0.912)	48	4.27	0.581

Below are some of the statements/opinions of parents further clarifying some of the aspects of the research area:

"I think the school is very good and that the teachers are great" (parent 1).

"The school, and particularly the management, could improve communication and be more open to new pupils and to parents that wish to place their children in this school. They should organise an open day and promote the IB programme. English-speaking staff should be encouraged to become involved. The IB programme is a very good philosophy for our children and we are happy with it" (parent 2).

"The school should admit more local (Slovenian) children. This would be good for both – the children from other countries would get to know Slovenian life and culture, while the Slovenian children would be able to choose an international education. There needs to be more written material linked to the contents of the curriculum. Children shouldn't be copying words from a blackboard" (parent 3).

"I think there could be more communication with parents. Using e-mail to inform parents of current events would help a great deal. On a number of occasions, despite my best efforts, I have been unable to find out what's happening in class. I would welcome more feedback" (parent 4).

"The teaching of Slovenian could be more interactive so that pupils could become more integrated into the environment of the host country" (parent 5).

Despite the high marks given in their responses, some parents used the open part of the questionnaire to draw attention to some of the expectations that were not being fully met; these were, in part, linked to a perceived lack of contact and cooperation between pupils in the international programme and their 'closest environment', i.e. pupils from the Slovenian programme at this and other primary schools.

DISCUSSION

We can see that pupils attending the international school were more satisfied with their lessons, their teachers and the school as a whole than were the pupils attending the Slovenian programme. On the one hand, this is demonstrated by the high level of correspondence between the expectations of teachers and pupils (Farley 2005; Schofield 2006), and on the other hand by the fact that the academic requirements applying to pupils at the international school are not enforced in a rigid manner (Stevens 2007). Tan and Bibby (2011) report similar findings. The authors show that 80% of MYP pupils agree that their schools provide them with a well-supported learning environment, they are sufficiently engaged and that they are encouraged to tackle complex problems. The experiences they acquire in school are a useful preparation for other areas of work and for life in general. Despite the fact that a high percentage of IB pupils, as well as pupils from other schools, agree regarding the question of good relations and good cooperation with the school and teachers, around 5% of pupils in the IB programme did

not rate four of the dimensions as highly: social integration, global learning, personal development and academic orientation. There are likely to be several reasons for this, with one of the main reasons certainly being the influence of the curriculum. The international programme is designed to encourage pupils to acquire knowledge, and to develop the approaches and skills they need to participate actively and responsibly in a changing and ever more complex world (Hill 2002; Hare 2010). This means that the international school's curriculum is a 'living' one (Beane 1990), going beyond the traditional 'imparting of knowledge'. It involves educating children to think internationally and independently, teaching them how to identify the relationships between school subjects and the outside world, adapt to new situations, bring their areas of knowledge together in appropriate ways, and resolve real problems practically and in a socially intelligent manner, on their own or in groups (Perkins 1992; Hill 2002; Zimmerman, Stage 2008).

The pupils in the international programme were fairly critical in their assessment of the level of contact and cooperation with other schools, and even with the pupils attending the Slovenian primary school programme in the same school. They spend little social time with them, and joint work on various activities or projects is the exception rather than the rule. The two schools have separate staircases, which makes spontaneous socialising between pupils at break times somewhat more difficult. That said, we do believe that the way the school is set out, and the cultural and language differences between the pupils, are not the main reasons for the unsatisfactory level of contact and cooperation between the two sets of pupils – particularly since, on the basis of the interview held with the school heads, the school does organise a fair number of different activities involving pupils from the two programmes. It is clear that certain factors or circumstances, which one of the school heads defined very clearly, have a stronger impact on pupils and are decisive in determining their perception of contact and cooperation with their peers.

The pupils from the international school come from a variety of countries and cultural environments. Almost 23% of them attend the international school for less than one year and 39% for between one and three years. This means that a large number of pupils do not live in Slovenia for long enough to form strong ties with their Slovenian peers, or indeed that they change their environment so frequently, in comparative terms, that it discourages them from doing so; as a consequence, they tend to socialise more with schoolmates within the international programme, since what brings them together are similar stories of moving from one place to another and their encounters with strange environments and other cultures. No matter how long the period of residence, life in a foreign country always leaves them feeling like a foreigner and the traces of constantly having to adjust remain with them (Flam, King 2005). At the same time, their social sense develops, alongside a desire for contact and cooperation. This stimulates positive feelings, strengthens ties between individuals and improves children's self-image (Bernard et al. 2007; Fredrickson 2009).

Of course, the language barrier does to some extent hinder closer and more spontaneous contact with Slovenian children, even though this should not be a problem, particularly among older pupils. For example, 19% of pupils in the international programme use English at home, with a somewhat lower percentage using Slovenian alongside English. Among the other pupils, there is a wide variety of languages spoken at home. It is also true that all pupils attending the Slovenian primary school programme learn English, while the pupils attending the international programme learn Slovenian as a compulsory foreign language (a requirement of the IBO programme). The situation could be improved with the more methodical creation of an environment that encouraged contact and cooperation between pupils in various activities in both the international and nine-year primary school programmes. This would enable experiences to be exchanged, help to improve the language skills of both sets of pupils, and strengthen the social ties between them.

Despite the fact that there is no statistical significance in the differences established between the pupils from the two programmes in terms of the average marks attained in the tests, there are nevertheless slightly larger deviations with regard to certain tasks/content areas. Although it is difficult for

us to say that the pupils from the two programmes differ in terms of the way they completed the tasks, differences did nevertheless appear in their knowledge and understanding (although the differences were not statistically significant), and in their abilities to analyse and to apply procedural knowledge; there were also differences in the way they linked and used their knowledge. The research carried out in 2010/2011 as part of the International Schools' Assessment (ISA) presents a similar picture. The findings showed that pupils that attended the MYP programme at an international school attained better results than pupils from other schools at the overall level in all four areas examined: numeracy, reading, narrative writing and expository writing (Tan, Bibby 2010; Tan, Bibby 2011).

There are several reasons for this. In our case, consideration must be given, on the one hand, to the differences in age of the pupils and, in part, to the fact that subjects are taught at different times of the year, although one must certainly also look for answers in the link between teaching and pupil performance (Cankar et al. 2011). The question is whether and how teaching in the international school differs from teaching in the Slovenian school. It would therefore make sense to undertake further research into the issues covered by the second objective and to focus on the 'teaching variable', which is to a large extent determined by the philosophy of the curriculum.

Parents' involvement in schools or other educational institutions is important for both parents and institutions; this is especially true of immigrant parents. Such parents frequently have a lack of knowledge of the education system of the country to which they have moved, and not infrequently have negative experiences expressed as a social distance from the school in the country to which they have moved (Portes, Rumbaut 2006). Our findings show, however, that most of the parents have a good understanding of the ideas and approaches of the international school attended by their children. Parents believe it is important that the school provides a safe and stimulating environment based on understanding and respect, and one that promotes the dimensions of international and intercultural understanding and cooperation. The fact that the majority of parents have moved to Slovenia from other countries in which their children attended a similar school means that they have a very good understanding of the specific features of the international school. The statements and comments provided by parents confirm the findings acquired on the basis of empirical data; at the same time, they clarify in even greater detail certain aspects of the life and work of the school, which can assist in future improvements to the education and schooling process.

CONCLUSION

The findings show that there are characteristic differences in their views regarding lessons, teachers and cooperation with peers between pupils attending the international school and pupils attending the Slovenian primary school. The pupils attending the international programme are satisfied with their lessons, their teachers and the school as a whole. They were, however, fairly critical in their assessment of the level of contact and cooperation with other schools, and even with the pupils attending the Slovenian primary school programme, socialising with them, in their free time as well, only to a small extent. One can confirm, on the basis of the interview held with the school heads, that the school does organise a fair number of different activities involving pupils from both programmes. It is clear that certain factors or circumstances have a stronger impact on pupils and are decisive in determining their perception of contact and cooperation with their peers. Although the differences established in the average marks attained in the tests between the pupils from the two programmes are not statistically significant, it is nevertheless possible to establish slightly larger deviations with regard to certain tasks/content areas in all subjects in both programmes. Parents are also satisfied, giving detailed analyses of certain aspects of life and work at the school in their statements and comments. They also suggest a number of measures to further improve the quality of life and work at the school. Despite the several limitations imposed by the methodology employed in this research, it is possible to conclude that the international school is

successful and, in this respect, substantially comparable with the Slovenian primary school programme. The results do indicate a number of specific differences; however, these are not of a nature that would enable us to conclude that one programme is more successful than another.

REFERENCES

- Beane, James (1990). *A Middle School Curriculum: From Rhetoric to Reality*. Westerville: National Middle School Association.
- Bernard, Michael E., Stephanou, Andrew, Urbach, Daniel (2007). *The ASG Student Social and Emotional Health Report*. Oakleigh Vic: Australian Scholarship Group.
- Bešter, Romana (2009). Vključevanje imigrantskih otrok v izobraževalni sistem. *Razprave in gradivo* 59, 93–116.
- Bibby, Yan, Tan, Ling (2008). *ISA Technical Report*. Melbourne: Australian Council for Educational Research.
- Biggs, John, Kember, David, Leung, Doris Y. P. (2001). Revised Two-Factor Study Process Questionnaire R-SPQ-2F. *British Journal of Educational Psychology* 71, 133–149.
- Cankar, Franc, Deutsch, Tomi, Setnikar-Cankar, Stanka, Barle-Lakota, Andreja (2011). Povezanost regionalnega razvoja in učnih dosežkov učencev. *Pedagoška obzorja - Didactica Slovenica* 26/3, 115–132.
- Farley, John (2005). *Majority–Minority Relations*. Upper Saddle River: Pearson Prentice Hall.
- Flam, Helena, King, Debra (2005). *Emotions and Social Movements*. London, New York: Routledge.
- Fredrickson, Barbara (2009). *Positivity: Groundbreaking research reveals how to embrace the hidden strength of positive emotions, overcome negativity, and thrive*. New York: Crown Publishing Group.
- Hare, John (2010). Towards an Understanding of Holistic Education in the Middle Years of Education. *Journal of Research in Education* 5, 301–322.
- Heckmann, Friedrich (2008). *Education and Integration of Migrants. NESSE Analytical Report 1 for EU Commission DG Education and Culture*. Bamberg: European forum for migration studies.
- Hill, Ian (2002). The History of International Education: An International Baccalaureate Perspective. *International Education in Practice: Dimensions for National & International Schools* (Eds. Mary Hayden, Jeff Thompson, George Walker). London: Kogan Page, 18–29.
- IBO (2006). *IB Learner Profile Booklet*. Cardiff: International Baccalaureate Organization.
- Josipovič, Damir (2012). Instrumentalizacija etničnosti znotraj večnacionalnih držav: primer kolonizacije Slovencev v Avstro-Ogrskem delu nekdanje Jugoslavije. *Dve domovini/Two Homelands* 35, 135–148.
- Kember, David, Biggs, John, Leung, Doris Y. P. (2004). Examining the Multidimensionality of Approaches to Learning Through the Development of a Revised Version of the Learning Process Questionnaire. *British Journal of Educational Psychology* 74, 261–279.
- Klun, Maja, Setnikar Cankar, Stanka (2013). Better Regulation and Public Procurement in Slovenian Municipalities. *Transylvanian Review of Administrative Sciences* 38, 96–105.
- Lesar, Irena, Čančar, Ivana, Jug Došler, Anita (2012). Učitelji iz Slovenije in Švedske o poučevanju (novo) priseljenih učencev. *Dve domovini/Two Homelands* 36, 59–72.
- Luchtenberg, Sigrid (2004). *Migration, Education and Change*. London: Routledge.
- Marshman, Roger (2010). *Concurrency of Learning in the IB Diploma Programme and Middle Years Programme*. Cardiff: International Baccalaureate Organization.
- Mlakar, Petra (2012). Skoraj 48.000 evrov za šolanje otrok diplomatov v Sloveniji. *Dnevnik* (14 September 2012).
- Mlekuž, Jernej (2010). Burekpomeni burekdarovanja neburekljudem. *Dve domovini/Two Homelands* 31, 65–77.
- Musek Lešnik, Kristijan (2011). *Siva knjiga o osnovni šoli v Republiki Sloveniji*. Ljubljana: IPSOS.

- OECD (2006). *Programme for International Student Assessment (PISA)*. Paris: Organisation for Economic Co-operation and Development.
- Perkins, David (1992). *Smart Schools: Better Thinking and Learning for Every Child*. New York: Free Press.
- Portes, Alejandro, Rumbaut, Ruben G. (2006). *Immigrant America: A Portrait*. Berkeley, Los Angeles, London: University of California Press.
- Schneeweis, Nicole (2011). Educational Institutions and the Integration of Migrants. *Journal of Population Economics* 24/4, 1281–1308.
- Schofield, Janet (2006). *Migration Background, Minority-Group Membership and Academic Achievement: AKI Research Review 5*. Berlin: Wissenschaftszentrum für Socialforschung.
- Stevens, Peter A. J. (2007). Researching Race/Ethnicity and Educational Inequality in English Secondary Schools. A Critical Review of the Research Literature Between 1980 and 2005. *Review of Educational Research* 77/2, 147–185.
- Tan, Ling, Bibby, Yan (2010). *IB PYP and MYP Student Performance on the International Schools' Assessment (ISA)*. Melbourne: Australian Council for Educational Research.
- Tan, Ling, Bibby, Yan (2011). *Performance Comparison Between IB School Students and Non-IB School Students on the International Schools' Assessment (ISA) and on the Social and Emotional Wellbeing Questionnaire: Research Report*. Melbourne: Australian Council for Educational Research.
- TIMSS (2007). *Trends in International Mathematics and Science Study*. Alexandria: National Center for Education Statistics.
- TIMSS (2011). *Trends in International Mathematics and Science Study*. Alexandria: National Center for Education Statistics.
- Vrečer, Natalija, Možina, Ester, Svetina, Metka, Žalec, Natalija, Javrh, Petra, Zihelr, Teja (2008). *Izobraževanje in usposabljanje migrantov v Sloveniji: poročilo raziskovalnega projekta*. Ljubljana: Andragoški center Republike Slovenije.
- Zimmerman, Timothy D., Stage, Elizabeth K. (2008). Teaching Science for Understanding. *Powerful Learning: What we know about teaching for understanding* (ed. Linda Darling-Hammond). San Francisco: Jossey-Bass, 151–192.

K N J I Ž N E O C E N E

B O O K R E V I E W S

Zorana Medarić in Mateja Sedmak (ur.), *Children's Voices: Interethnic Violence in the School Environment*, Založba Annales, Koper, 2012, 263 str.

V zadnjih desetletjih se o medkulturni vzgoji in etnični strpnosti veliko govori in piše, ne nazadnje tudi zato, ker etnična heterogenost sodobnih evropskih družb prinaša številne izzive pri zmanjševanju predsodkov, ksenofobije in etnocentrizma. Področja večkulturnih realnosti so bila v znanstvenem pogledu že dodobra raziskana, še vedno pa ostaja nekaj aspektov, ki jim raziskovalci (še) niso namenili dovolj pozornosti. S tega vidika prispevki zbornika *Children's voices: Interethnic Violence in the School Environment* dopolnjujejo obstoječo literaturo o razširjenosti medetničnega nasilja v šolskem okolju.

Zbornik je nastal kot zaključna publikacija mednarodnega raziskovalnega projekta, ki je vključeval pet držav Evropske unije (Slovenijo, Avstrijo, Ciper, Italijo in Veliko Britanijo oz. Anglijo) in je v analizo zajel približno 4.000 otrok in mladostnikov iz osnovnih in srednjih šol. Glede na relativno pomanjkanje študij medetničnega nasilja v šolskem okolju je vsebina prispevkov pomembna, saj predstavlja konkretne izsledke kvalitativne in kvantitativne raziskave, ponuja ažuren vpogled v razmere na obravnavanem področju in odpira smernice raziskovanja tega področja. Vsako izbrano šolsko okolje je zaznamovano z drugačnimi karakteristikami, zato ni presenetljivo, da se tudi rezultati študij v nekaterih pogledih razlikujejo. To je razvidno tako iz stopnje medetničnega nasilja med mladoletniki kot tudi iz stopnje njihove strpnosti ter iz državnih in šolskih politik preprečevanja nasilnega vedenja. A pri tem je, kot že rečeno, pomembno upoštevati značilnosti posameznega konteksta; če je bila na primer v Angliji raziskava izvedena na šolah z zgolj 25-odstotnim deležem »etničnih Britancev«, so bile v Italiji v študijo zajete šole s skoraj 80-odstotnim deležem Italijanov. S tega vidika lahko rečemo, da so nacionalne raziskave posamezne študije primera, saj iz metodoloških razlogov niso niti povsem primerljive niti povsem splošljive. A ne glede na to rezultati izvedenih študij, v nasprotju s splošno uveljavljeno tezo o naraščajoči ksenofobiji in etnocentrizmu, kažejo na relativno nizko stopnjo medetničnega nasilja med otroki in mladostniki – kar pa še ne pomeni, da konfliktov med pripadniki različnih etničnih skupin ni. Poleg tega je mogoče opaziti, da nasilje prevzema manj eksplicitne oblike, kar se na primer kaže v nižjih stopnjah soočanja s fizičnim nasiljem ter nekoliko višjih stopnjah verbalnega nasilja in segregacije. Zanimivo je tudi, da se oblike medetničnega nasilja praviloma pogosteje pojavljajo med mlajšimi otroki kot pa med mladostniki.

Velika Britanija se kot nekdanja kolonialna država ter kot ena izmed ciljnih držav sodobnih migracijskih tokov sooča z visoko stopnjo etnične heterogenosti urbanih središč, kar je državo na nek način prisililo k aktivnejši politiki upravljanja kulturne raznolikosti. Pravzaprav je etnična populacijska slika Velike Britanije tako kompleksna, da so se raziskovalke Sally Inman, Pip McCormack in Sarah Walker z londonske univerze South Bank osredotočile zgolj na islamofobijo, ki v zadnjem desetletju med Britanci postaja vse bolj očitna. Stopnje soočanja z nasilnim vedenjem v izbranih angleških šolah so praviloma višje kot v preostalih obravnavanih državah, a so – glede na izrazito etnično raznolikost angleškega vzorca – najbrž te stopnje nekoliko višje prav zaradi intenzivnejših medetničnih stikov, saj je na drugi strani tudi strpnost do »drugačnih« med angleškimi otroki in mladostniki višja kot v drugih državah. Tako se po mnenju avtoric islamofobni diskurz v šolskem okolju ne izraža v enaki meri kot v britanski družbi na makroravni.

Podobno ocenjujeta Birgit Sauer in Edma Ajanović z dunajske univerze, ki pravita, da medetnično nasilje v šolah ni tako izrazito, kot bi lahko pričakovali na podlagi siceršnjih antiimigrantskih implikacij avstrijskega medijskega in političnega prostora. Šolsko okolje poimenujeta 'varovano območje' (*protected space*), saj ga kot takega dojemajo tako otroci kot tudi učitelji. Medetnično nasilje, ugotavljata, nima enoznačnih indicov, temveč se prepleta z različnimi okoliščinami, kot so na primer spol, osebne značilnosti, posameznikov zunanji videz in socialno-ekonomski položaj. Tako se na primer tudi medvrstniški konflikt, ki primarno ne izvira iz posameznikove etnične pripadnosti, jezika ali religije, lahko na koncu razvije v konflikt z elementi nacionalizma.

Ugotovitve avstrijske študije v nekaterih pogledih sovpadajo z rezultati slovenske raziskave; raziskovalki z Univerze na Primorskem Ana Kralj in Tjaša Žakelj namreč poudarjata, da je etnična oziroma kulturna identiteta redko prepoznana kot pglavitni razlog medvrstniškega konflikta, saj se ta pogosteje pojavlja kot spremljevalni dejavnik nasilnega vedenja. Medetnično nasilje med učenci in učitelji v Sloveniji zato ni dojet kot pereč problem. A po drugi strani avtorici kot problematično poudarjata samo percepcijo nasilja; nekateri učenci na primer menijo, da oznake, kot so »čefur«, »čapač«, »šiptar«, in »cigo«, nimajo negativne konotacije in po njihovem mnenju niso žaljivke. »Medetničnega nasilja pri nas ni« je izjava, ki ponazarja stališča večine sodelujočih v slovenski raziskavi, tako med učenci kot tudi med učitelji in šolskim osebjem.

Nekoliko drugačne ugotovitve izpostavljata avtorja italijanske raziskave, Giovanni delli Zotti in Ornella Urpis s tržaške univerze, ki menita, da se medetnično nasilje pogosteje kot v šolskem okolju pojavlja zunaj njega. Velik vpliv na reprodukcijo stereotipov in predsodkov o tujcih pripisujeta makrodružbenim procesom, še zlasti medijskemu diskurzu. Po drugi strani pa opažata, da učitelji, motivirani za poučevanje večkulturnih tematik in vprašanj s področja človekovih pravic, spodbujajo projekte za družbeno vključenost in refleksijo kulturne raznolikosti, kar med učence prinaša tudi vse večjo zavedanje o pravicah posameznika.

Tudi raziskovalca z Evropske univerze na Cipru Marios Vryonides in Maria Kalli ocenjujeta, da medetnično nasilje v njihovem izobraževalnem okolju ni večji problem. V zaključku svojega prispevka izpostavljata, da bi se vse večja ekonomska nestabilnost države utegnila odražati tudi v naraščajočih napetostih med pripadniki različnih etničnih skupin. Uvodni pregled raziskovanja medetničnih odnosov poudarja razhajanja med grškimi in turškimi prebivalci otoka, kar se ne kaže v neposrednem nasilju, temveč v izraziti segregaciji; ena etnična skupina živi na severu, druga pa na jugu države. Posledično so bili iz raziskave, izvedene le v grškem delu Cipra, izvzeti pripadniki turške manjšine, kar je z vidika specifične ciprske situacije precejšen manko njihove analize.

Iz zgoraj poudarjenih vsebinskih vidikov je razvidno, da je zbornik *Children's Voices* točka premisleka za vse, ki se ukvarjajo s temami etničnih in medkulturnih študij, saj odpira vprašanja prepletenosti medetničnega nasilja z različnimi osebnimi in institucionalnimi dejavniki. Zanimivo je tudi, da se na eni strani soočamo z literaturo, ki opozarja na precejšen porast ksenofobije in etnocentrizma v evropskih družbah, na drugi strani pa avtorji zbornika ocenjujejo, da je stopnja medetničnega nasilja v analiziranih šolah relativno nizka. Ali je torej strpnost v večkulturnih družbah dolgoročno dosegljiv cilj in ne le utopično izhodišče kozmopolitskih vrednot? Kot pravijo avtorji posameznih prispevkov, primeri dobrih praks pričajo o tem, da ustrezen odnos do nasilja in kulturne različnosti v njem lahko prinese pozitivne spremembe, saj intenzivna promocija kulturne raznolikosti kot temeljne družbene vrednote in uvajanje nične tolerance v šolskem okolju praviloma delujeta kot učinkovita preventivna ukrepa za zmanjševanje nasilnega vedenja, diskriminacije in segregacije. S tega stališča je treba priznati, da so predstavniki mlajših generacij pomembni nosilci družbenih vrednot in posledično tudi sprememb, ki bi se v prihodnosti lahko manifestirale v večji stopnji medkulturne strpnosti in enakopravnosti, ne le v šolskem okolju, temveč tudi v širši družbi.

Barbara Gornik

TEMATSKI SKLOP / THEMATIC SECTION

Marginal Mobilities / Marginalne mobilnosti

Špela Kalčič, Marko Juntunen, Nataša Rogelja

Marginal Mobility: A Heuristic Tool for Comparative Analysis of Contemporary Mobilities

Marko Juntunen

Arranging Mobile Lives: Marginalised Moroccan Men in Transnational Space

Špela Kalčič

Going Nomad: New Mobile Lifestyles among Europeans

Nataša Rogelja

Contemporary Peripatetic Adaptations: Mobility, Marginality and Inventiveness

Mari Korpela

Marginally Mobile? The Vulnerable Lifestyle of Westerners in Goa

Ines Kohl

Vagabonds or Elites? The Mobile Lifestyle of Contemporary Tuareg

Alenka Janko Spreizer

Roma, Gypsy Travellers, Gens du Voyage: People who Travel?

RAZPRAVE IN ČLANKI / ESSAYS AND ARTICLES

Sanja Cukut Krilić

Obravnava staranja v migracijskih študijah in socialni gerontologiji

Jurij Kočar

Podnebne selitve v okraju Shyamnagar v Bangladešu

Miha Zobec

Nekateri aspekti vključevanja v argentinsko družbo skozi prizmo izseljenke korespondence

Metka Lokar

Zelen kot Slovenija in rdeč kot ljubezen: Slovenski jezik med Slovenci v prostoru nekdanje Jugoslavije

Franc Cankar, Tomi Deutsch, Olga Dečman Dobrnjič, Stanka Setnikar Cankar

Education of Migrant Children in an International Primary School Programme: Comparison with a Slovenian Primary School

KNJIŽNE OCENE / BOOK REVIEWS

Zorana Medarić, Mateja Sedmak (ur. / eds.), *Children's Voices: Interethnic Violence in the School Environment*, Annales, Koper, 2012 (Barbara Gornik)

ISSN 0353-6777



9 770353 677013