

502019

h o m e l a n d s

R

V

E E i

Inštitut za slovensko izseljenstvo in migracije ZRC SAZU

*Glavna urednica / Editor-in-Chief*

Mirjam Milharčič Hladnik

*Odgovorna urednica / Editor-in-Charge*

Marina Lukšič Hacin

*Tehnična urednica / Technical Editor*

Irena Destovnik

*Mednarodni uredniški odbor / International Editorial Board*

Synnove Bendixsen, Ulf Brunnbauer, Aleš Bučar Ručman, Martin Butler,  
Daniela I. Caglioti, Jasna Čapo, Donna Gabaccia, Jure Gombač, Ketil Fred Hansen,  
Dirk Hoerder, Damir Josipovič, Aleksej Kalc, Jernej Mlekuž, Claudia Morsut,  
Ihklas Nouh Osman, Nils Olav Østrem, Lydia Potts, Maya Povrzanović Frykman,  
Francesco della Puppa, Jaka Repič, Rudi Rizman, Matteo Sanfilippo, Annemarie Steidl,  
Kristina Toplak, Adam Walaszek, Rolf Wörsdörfer, Janja Žitnik Serafin

*Lektoriranje / Proofreading*

Peter Altshul (angleški jezik / English)

Irena Destovnik (slovenski jezik / Slovene)

*Oblikovanje / Design*

Anja Žabkar

*Prelom / Typesetting*

Inadvertising d. o. o.

*Izdala / Published by*

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

*Tisk / Printed by*

Collegium Graphicum d. o. o., Ljubljana

*Naklada / Printum*

250

*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: [mgliha@zrc-sazu.si](mailto:mgliha@zrc-sazu.si)

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

© ZRC SAZU, Inštitut za slovensko izseljenstvo in migracije, Založba ZRC

Revija izhaja s pomočjo Javne agencije za raziskovalno dejavnost Republike Slovenije in Urada vlade Republike Slovenije za Slovence v zamejstvu in po svetu.

**TWO**  
home lands

MIGRATION STUDIES

50 • 2019

**D V E**  
domovini

RAZPRAVE O IZSELJENSTVU

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 submitted articles are subject to double-blind peer review.

**Povzetki in indeksiranje / Abstracts and indexing:**

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

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

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

Master Card / Euro Card and VISA accepted.

*Naročila sprejema / Orders should be sent to:*

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

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

# VSEBINA / CONTENTS

## TEMATSKI SKLOP / THEMATIC SECTION

### ŽENSKÉ V MISIJONIH: MED SLOVENIJO IN INDIJO / WOMEN IN THE MISSIONS: BETWEEN SLOVENIA AND INDIA

#### ANA JELNIKAR

- Slovene Women Missionaries in India: Contexts, Methods and Considerations 7  
Slovenske misijonarke v Indiji: Konteksti, metode in premisleki

#### IRENA AVSENIK NABERGOJ

- The Mission of the Church in Dialogue with Non-Christian Religions 15  
Misijonsko poslanstvo Cerkve v dialogu z nekrščanskimi verstvi

#### HELENA MOTOH

- “Our Bengal Mission”: Negotiation of National and 33  
Transnational Agendas by Interwar Yugoslav Missionaries in Bengal  
»Naš bengalski misijon«: Usklajevanje nacionalnih in transnacionalnih  
načrtov pri jugoslovanskih misijonarjih in misijonarkah v Bengaliji  
med obema vojnama

#### TAMARA DITRICH

- Female Renouncers in India: A Neglected Chapter in the 53  
History of Indian Religions  
Odpoved indijskih žensk posvetnemu življenju:  
Pozabljeno poglavje v zgodovini indijskih religij

#### BENJAMIN ZACHARIAH

- The Tongue is Mightier than the Printing Press? Reflections on the 71  
Production of Oral Histories and on Languages of Legitimation  
Ali je jezik močnejši od tiskane besede? Razmišljanja o produkciji ustnih  
zgodovin in jezikih legitimitete

#### NATAŠA ROGELJA CAF

- A Life in Letters: An Anthropological Reflection on the 89  
Correspondence of Slovene Missionary sr. Conradina Resnik  
Življenje v pismih: Antropološka refleksija korespondence  
slovenske misijonarke, sestre Konradine Resnik

## ČLANKI / ARTICLES

#### FRANCESCO DELLA PUPPA

- Transnational Families and Migrant Masculinities: The Social Institution of 111  
Male Adulthood and Family Reunification in the Bangladeshi Diaspora in Italy  
Transnacionalne družine in moškost migrantov: Socialni institut moške  
odraslosti in združevanje družin v bangladeški diaspori v Italiji

<b>DUŠKA KNEŽEVIĆ HOČEVAR, SANJA CUKUT KRILIĆ</b>	
Contestable Demographic Reasoning Regarding Labour Mobility and Migration	131
Delovna mobilnost in migracije v vprašljivem demografskem umovanju	
<b>LEV CENTRIH</b>	
»Maribor ob morju«: Zveza komunistov Slovenije in vprašanje poselitve Koprskega okraja v letih 1945–1965	147
“Maribor by the Sea”: The League of Communists of Slovenia and the Question of the Settlement of the Koper District 1945–1965	
<b>JERNEJ MLEKUŽ</b>	
Nadzor nad nenadzorovanimi migracijami: Kako je slovensko časopisje pisalo o prebegih iz Jugoslavije v letih 1945–1965	163
Control of Uncontrolled Migrations: How the Slovenian Newspapers Reported on Defections from Yugoslavia 1945–1965	
<b>MARINA LUKŠIČ HACIN</b>	
Političnost migracij po drugi svetovni vojni: Od politike revanšizma do amnestije	183
The Political Character of Migration after the Second World War: From the Politics of Revanchism to Amnesty	
<b>MARJAN SMRKE</b>	
Religioznost in velikodušnost do migrantov	199
Religiosity and Generosity Toward Migrants	
<b>MAJA GOSTIČ</b>	
Izkušnje bivanja in dela sodobnih slovenskih izseljencev v Avstriji in Nemčiji	217
The Experience of Living and Work of Contemporary Slovenian Emigrants in Austria and Germany	
<b>LUCIA KULIHOVA</b>	
Zavajajoči podatki na seznamih ladijskih potnikov kot posledica restriktivne ameriške migracijske zakonodaje	237
Misleading Data on Passenger Lists as a Consequence of Restrictive American Migration Legislation	
<b>KNJIŽNE OCENE / BOOK REVIEW</b>	
Khaled A. Beydoun, <i>American Islamophobia: Understanding the Roots and Rise of Fear</i> (Gaziza Tolesh)	255

T E M A T S K I S K L O P

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

ŽENSKÉ V MISIJONIH:  
MED SLOVENIJO  
IN INDIJO /  
WOMEN IN THE MISSIONS:  
BETWEEN SLOVENIA  
AND INDIA





## SLOVENE WOMEN MISSIONARIES IN INDIA: CONTEXTS, METHODS AND CONSIDERATIONS

### SLOVENSKE MISIJONARKE V INDIJI: KONTEKSTI, METODE IN PREMISLEKI

Ana JELNIKAR<sup>1</sup>

The following five papers by scholars from various academic disciplines are intended as a contextual and methodological backdrop to a larger and on-going research project, begun in May 2017 under the title “Slovene Women Missionaries in India: A Forgotten Chapter in Intercultural Relations” (ARRS – J6 8258). Barely half way through this study, we are yet to complete the gathering and processing of primary data related to the lives of a dozen Slovene women missionaries, who left their native country over the course of the twentieth century and ended up in different parts of India, where they lived, worked and – in most cases – also died.

The first Slovene woman to be sent to India (Bengal) as a missionary was Barbara (Betka) Kajnič (1892–1984) from Velika Nedelja near Ormož. She travelled in the company of a much younger Macedonian-born Albanian, Agnes Gonxhe Bojaxhiu, today better known as Mother Theresa. Barbara Kajnič alias Sister Magdalena began her journey on 12 October 1928 from Zagreb to Ireland. There the two Yugoslav women joined the congregation of Loreto nuns in Rathfarnham, Dublin. Within months they were sent to India, reaching the colonial city of Calcutta on 6 January, 1929.<sup>1</sup>

Over the following decades, a dozen other Slovene missionary sisters followed suit, most of them leaving within a few years of Sister Magdalena’s departure. They were: Marija Franko (1895–?), Mirjam Zalaznik (1899–1982), Terezija Medvešek (1906–2001), Cirila Doktorič (1906–1985), Uršula Fink (1906–1959), Conradina Resnik (1905–1997), Emilija Koren (?–?) and Štefanija Urih (1909–?). At that time, India was still under British rule, but the forces of nationalism and the anti-colonial independence struggle were rapidly gathering momentum. Temporarily suspended during World War II, the situation for foreign missionaries changed after India gained independence in 1947. Although those who were already present did not face eviction, newcomers were no longer welcome. Two Slovene women facing this situation were sisters Agnes (1927–2010) and Terezija Žužek (1928–2019). Both were part of the wave of Catholics fleeing the communist regime in the newly established socialist Yugoslavia immediately after the war. They were interned in Displaced Persons Camps in Italy

<sup>1</sup> PhD in Indian Studies, Research Assistant, Institute for Anthropological and Spatial Studies ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; ajelnikar@gmail.com

<sup>1</sup> See Jelnikar 2016. The Ptuj-Ormož Regional Museum hosted an exhibition on her life and work in India from 18 May to 10 September, 2018.

(Treviso, Serigallia, Barleta), effectively being made stateless. Holding medical degrees, the Žužeks joined the Medical Mission Sisters in South Shields, England, and eventually acquired British citizenship. It proved impossible to obtain a missionary visa to work in post-independence India with a British passport. They were sent to the newly-established Pakistan instead, working in Rawalpindi, Karachi, and Dacca (then still East Pakistan, before becoming Bangladesh in 1971).

As a Yugoslav citizen, the situation in 1971 was different for Marija Sreš (b. 1943), the youngest of our group of missionaries. The development of friendly relations between Nehru's India and Tito's Yugoslavia (this was the heyday of the Non-Aligned movement) smoothed the way for her entry on a missionary visa. Decades later, and in a drastically changed political climate, the same courtesy was denied her, as her missionary visa was not renewed, forcing her to return to Slovenia in 2010. With Sreš's departure from India, this chapter of Slovene women missionaries working and living in India was brought to what could very well be a permanent close.

The individual stories of our twelve protagonists must be read against the backdrop of dramatic historical changes in both India and Yugoslavia over the course of the twentieth century, which have also affected the relations between these two countries. To appreciate the twelve life stories brought together in this project, it is necessary to take not only this historical context into consideration, but also the way in which this research has been conceived and organized.

For reasons of time and funding, we have limited ourselves – for now – to exploring the life-stories of *Slovene* women missionaries only. However, we hope that the study can eventually be expanded to include Catholic sisters from elsewhere in the former Yugoslavia (predominantly from Croatia) who have also been part of this same movement of missionaries.<sup>2</sup> For now, it makes sense to identify these women as “Slovene”, because they all hailed from what is present-day Slovenia. However, at the time, they would have left their native home as Yugoslav nationals, using a variety of European countries and different religious congregations as conduits for a life as religious women working overseas. These are – once again – the life stories of individual women, who for various personal reasons, and each under their own particular set of circumstances, nevertheless experienced this common “Divine call”, which made them renounce all socially-sanctioned ties of family, marriage and children to opt for a lifetime of devotion to Jesus by attending to the poor in a distant country. Of course, there is much that unites these women in opting for a missionary vocation, but it would be inaccurate to assume any self-conscious group identity on their part. Once they found themselves working in India amongst the native population, alongside other European and indigenous co-sisters, we can assume that their own particular identities became subsumed under the overarching category of being white Europeans, no doubt tinged with the then-dominant discursive brush

2 Štefanija Miketinac (b. 1920) from Zagreb is the last Yugoslav (Croatian) sister remaining in India. I had the opportunity to interview her in February 2016 in her room at the Loreto convent in Simla at the age of 96.

of rulers and colonizers. This invites the question of whether it mattered to them or to others that they were “Slovenian” or not.

This is one important aspect our study aims to probe, as it draws out the voices of these sisters, while situating them within the respective European religious congregations, in which they formed a minority, even if they were not entirely on their own (see Motosh). In view of the entrenched missionary-colonial thesis that sees proselytizing, almost inevitably, as working in collusion with colonial domination, it is important to bear in mind that, within the setting of Europe, these women occupied a subaltern position. Coming from geographical and socio-political “margins” rather than powerful colonial centres, they can’t be considered as agents of colonization in any overt political sense. Of course, this does not automatically absolve them of culturally imperialistic or patronizing attitudes, or even a sense of racial superiority; after all, they did go to India to spread the Gospel of Jesus Christ. However, their interstitial position warrants a closer look that will go beyond overly simplistic understandings of the missionary enterprise and intercultural encounters in general. Women’s voices, even though often marginalised or even silenced, can indeed be found at all levels of modern-day empires, and their positions can vary from being the staunchest imperialists to that of the most selfless liberators and advocates of human dignity anywhere in the world.

One of the key concerns of the project is also to consider if – and how – (Slovene) women missionaries expressed their individual agency within the prescribed practices as dictated by the rules of their congregations, not only within the strongly patriarchal Catholic Church, but within male-dominated societies in general. We can expect to identify tensions existing between the official doctrine of the Church and these women’s daily lives and work in the missions. For example, Mother Theresa became a “rebel nun”, as she went against her superiors and set up her own congregation, focused on reaching the poorest sections of Indian society, and breaking away from what she perceived as an environment that was too elitist and exclusivist (cf. Alpion 2006). Her early companion, Sister Magdalena, also did not lack in self-initiative. She singlehandedly set up a dispensary in what was primarily a teaching order, working tirelessly for fifty-three years as a nurse-cum-doctor in the remotest stations of Bengal. In contrast to Mother Theresa, however, Sister Magdalena preferred anonymity and introversion (Jelnikar 2016). Closer to us in time is Marija Sreš. Quite against the expectations or prescriptions of her Society of Jesus, she became an award-winning writer of fiction in Gujarati, lending her voice to *adivasi* women with whom she worked for close to four decades. Her writing also broached subjects that radically defy notions of Catholic morality, such as sexuality and same-sex love. In a recent interview, Sreš stated that both “Christianity and Yugoslav socialism taught her that all people were equal”, an attitude which she found lacking in her co-religionists coming from former colonizing countries (Spanish and French missionaries with whom she had worked), but also in caste-ridden Indian society (in Žigon 2005: 147–148). This is not to suggest in any way that Slovene women missionaries were by

definition “activists” or “renegades”. Nor do we want to play down the many aspects of their (self-)imposed subservience. Instead, based on evidence collected from our preliminary investigations, it seems important to think about these women as agents of transformation in the societies in which they worked as missionaries, rather than as merely passive recipients of “God’s will” as dictated to them by their superiors.

The extended time span covered by this project also allows us to trace generational shifts in approaches to missionary work, responding to the changing political situation in India, as well as to changes within the Catholic Church before and after Vatican Council II (1962–1965). We have found that, working in Gujarat in the 1980s, Marija Sreš did not actively convert people as a part of her mission, instead self-consciously following the revolutionary “spirit” of the Vatican II. Belonging to an earlier generation, the letters of Sister Magdalena show that she did make efforts to bring people into the fold of the church. Evidently, these two women operated with very different mental horizons, and our study is interested in identifying similarities as well as differences amongst Slovene women missionaries, seeing their attitudes as an outcome of a complex nexus of historical and personal factors.

A topic that has so far remained confined within the walls of religious orders (and their archives) is therefore approached as a complex intercultural phenomenon deserving critical attention from a variety of angles at the crossroads of related disciplines, such as modern history, cultural studies, anthropology, gender studies, philosophy, and the theological and non-theological study of religion. Our focus is on *religious women*, or rather women religious – a still too-often invisible or repressed subject of (secular) historical investigation. So, while the study probes the socio-historical and personal factors which motivated Slovene women missionaries to join religious orders and leave their countries, it will also engage theoretically with the notion of (female) agency. In a setting overdetermined by religious, ethnic, gender and cultural hierarchies, it intends to suggest that despite their invisibility and subordination, some of these women were active agents of social change.

What does a missionary vocation involve in theological terms? This was one of the primary initial questions of our study. In her paper “The Missionary Commission of the Church in Dialogue with Non-Christian Religions”, Irena Avsenik Nabergoj, whose expertise includes theology, explores the question of how the Church has negotiated its unchanging missionary injunction to spread the good news across the globe against the changing historical circumstances, including processes of globalisation, decolonization, and modernization, with the watershed event for the Catholic Church in the modern era being the abovementioned Vatican Council II. Following a brief historical overview of the milestones that have spurred the Church to take new approaches to its missionary mandate, and by looking closely at the Church documents, she focuses on the changes brought about by the instructions of Vatican II regarding missionary activities, particularly in relation to non-Christian religions. The axis around which much of the debate turns is that of religious conversion, or rather the meaning and purpose of evangelisation, which can never be

true if forced or imposed. The free acceptance of the presupposed “universality” of the Gospel, however, jars with any simultaneous respect for the supposed “truths” of other religions, as the document *Nostra aetate* (1965) now mandates. The notion of *interreligious dialogue* provides an attempt to resolve this tension, in which the final desired outcome is no longer religious conversion, but a deepening of one’s own faith and an understanding of a common core between all religions. This is an important point to bear in mind for understanding the changes in outlook and practice when comparing those of Sister Magdalena and Marija Sreš, for example.

The immediately relevant historical backdrop for understanding the opportunities and motivations of Slovene women missionaries in India can be traced back to 1925. This was the year in which the first Yugoslav Jesuit fathers, under the auspices of the Belgium mission, volunteered for India. The intention was to help re-establish the outreach Mission Stations of Basanti, Raghampur, Morapai and Khari south of Calcutta, which had gone into decline since their beginnings in the mid-19th century. Soon after, Yugoslav nuns were brought in to work in the areas of female education and medical services, the mainstay of Christian missionary activities and traditionally viewed as the most practical and effective means of spreading the faith. Helena Motoh delves into this part of inter-war history in her paper entitled “‘Our Bengal Mission’ – Negotiation of National and Transnational Agendas by Interwar Yugoslav Missionaries in Bengal”, as she focuses on the tension arising between the fundamentally universalist tenets of a Christian missionary vocation and the fraught nationalist agenda of a changing polity, in which political and national identities were far from unproblematic givens. With reference to a body of (almost exclusively male) missionary writing of the day published in mission journals, she demonstrates how these socio-political realities and debates in Old Yugoslavia had spilled over into the missionary field, only to ask the pertinent question of whether these debates had had the same impact on female representatives. How “nationalist” and/or “patriotic” were Slovene women missionaries in India, at a time when these discourses presented competing alternatives to universalism more or less globally?

With her expertise in Indology and gender, and by way of contextualising the diversity of religious realities confronting Slovene women missionaries as they entered the Subcontinent, Tamara Ditrich offers a panoramic view of the millennia-long tradition of asceticism and monasticism in India. In her paper “Female Renouncers in India: A Neglected Chapter in the History of Indian Religions”, and in line with our enquiry, she focuses on *female* renunciates, the Buddhist and Jain nuns and Brahmanical female ascetics, in itself a comparatively neglected subject of academic investigation. However preliminarily, she is ultimately interested in identifying the meeting points and overlaps between the diverse body of Indian spiritual practices and the foundational premises of European Christianity. While noting major fundamental differences between them, such as renouncing the world versus social engagement, doctrinal inclusiveness versus exclusiveness, and the decentralised institutions of Indian ascetics versus the hierarchical establishment of the Catholic Church, she suggests that

the long continuous tradition of social acceptance, respect and support for (female) ascetics in India served as a legitimising framework for Christian nuns, however different or even incompatible their doctrinal premises may have been. In other words, Indian spiritual realities informed how Christian nuns would have been received and allowed to contribute to society in India.

Methodologically, this micro-history of a number of case studies of Slovene women missionaries working in both colonial and post-independence India is not without its challenges. Women religious, unlike their male counterparts, typically did not leave many written records behind. Aside from letters surviving with their relatives and local churches, which are not always easy to obtain, we find occasional mentions in inhouse religious publications and annals. Obtaining the oral testimonies of those who knew and remember the sisters is therefore of vital importance to our study. It will include interviews with co-religious sisters of European, Eurasian or indigenous descent, family members, priests and other people they worked with, their staff (drivers, gardeners, *ayahs*), etc. Here we are working in line with the on-going efforts of feminist (and subaltern) historians, who have been using oral sources as grounds for shaping their arguments about marginalised histories unavailable through conventional documentation since the 1980s (Rossi 1985; Griffin, Braidotti 2006). This democratizing impulse is instrumental in legitimizing subjective experiences in narratives and interpretations of people's life worlds (Thompson 1988), as it applies in particular to that half of humanity that has been silenced throughout history: women. The aim of our study is to use oral history and biography to give this particular group of women a voice, because, for the most part, they have never been heard.

In his paper, "The Tongue is Mightier than the Printing Press? Reflections on the Production of Oral Histories and on Languages of Legitimation", historian Benjamin Zachariah examines the debates on oral history, critically considering the method's potential as well as its limitations for historical analysis. While it may be true that "oral histories open up areas that other histories fail to reach", he cautions against any facile presupposition of truth-value in an intercultural encounter that presupposes a common language, if communication is to even take place. His concept of "languages of legitimation" is key to deploying oral history as a critical tool for the recovery of histories and subjectivities that are otherwise inaccessible.

So far, we have been fortunate to have found a substantial number of letters written by the various nuns, which we can analyse as primary source material. However, one such find has exceeded all our expectations. These are over a hundred letters written between 1933 and 1997 by Sister Conradina Resnik to her family in Slovenia. They were generously provided to us by her grandnephew to be used in this research. Nataša Rogelja, an anthropologist and expert on female migrations and life narratives, has taken up the challenge of analysing this lifetime worth of letters, "a specific kind of 'raw material'", which is similar but different to diaries and journals. In her paper "A Life in Letters: An Anthropological Reflection on the Correspondence of

Slovene Missionary Sr. Conradina Resnik", she considers in detail the many different aspects which are important in the analysis of letters, from their materiality to issues of content. Her contribution, however, is also intended as a broader theoretical reflection on letter-writing as a window onto, and a way of retrieving, history.

## REFERENCES

- Alpion, Gëzim (2007). *Mother Teresa; Saint of Celebrity?* London, New York: Routledge.
- Griffin, Gabriele, Braidotti, Rosi (2006). Introduction: Configuring European Women's Studies. *Thinking Differently: A Reader in European Women's Studies* London (eds. Gabriele Griffin, Rosi Braidotti). New York: Zed Books, 1–30.
- Jelnikar, Ana (2016). Betika Kajnč; Magdalena, slovenska redovnica, ki je z Materjo Terezo odšla v Indijo, <https://www.dnevnik.si/1042748662> (15. 3. 2019).
- Rossi, Alice (ed.) (1985). *Gender and the Life Course*. New York: Aldine.
- Thompson, Paul (1988). *The Voice of the Past: Oral History*. Oxford: Oxford University Press.
- Žigon, Zvone (2005). *Ljudje odprtih src: Slovenski misijonarji o sebi*. Ljubljana: Založba ZRC, 147–148.





# THE MISSION OF THE CHURCH IN DIALOGUE WITH NON-CHRISTIAN RELIGIONS

Irena AVSENIK NABERGOJ<sup>1</sup>

COBISS 1.01

## ABSTRACT

### **The Mission of the Church in Dialogue with Non-Christian Religions**

The article provides a brief overview of the milestones that have encouraged new approaches to the missionary activities of the Church throughout history. The main purpose is to determine how the Second Vatican Council responded to the process of globalization after the Second World War, what its understanding of inculturation was, and what new pathways for evangelization were sought in the missionary activities of the Church. The methodological principle is the comparative analysis of documents on the foundations, goals and means of pursuing the mission in a spirit of dialogue, enabling the recognition of good contributions from non-Christian religions. The article also includes more recent theological discourse on new challenges in attitudes to the mission.

**KEY WORDS:** the mission of the Church, milestones of the missions throughout history, renewal in relation to tradition, common core of all religions, dialogue

## IZVLEČEK

### **Misijonsko poslanstvo Cerkev v dialogu z nekrščanskimi verstvi**

Članek daje kratek pregled mejnikov, ki so spodbudili nove pristope v misijonski dejavnosti Cerkev skozi zgodovino. Poglavitni namen je ugotoviti, kako se je Drugi vatikanski koncil odzval na proces globalizacije po drugi svetovni vojni, kakšno je bilo njegovo razumevanje inkulturacije in kakšno iskanje novih poti evangelizacije v misijonski dejavnosti Cerkev. Metodološko načelo je primerjalna analiza dokumentov o utemeljevanju, cilju in načinu izvajanja misijona v duhu dialoga, ki omogoča prepoznavanje dobrih vsebin nekrščanskih verstev. Članek vključuje tudi novejši teološki diskurz o novih izzivih v pristopih k misijonu.

**KLJUČNE BESEDE:** misijonsko poslanstvo Cerkev, mejniki misijona skozi zgodovino, prenova v razmerju do tradicije, skupno jedro vseh religij, dialog

---

<sup>1</sup> PhD in Literary Sciences and Theology, Full Professor and Research Counsellor, ZRC SAZU, Institute for Cultural History, Novi trg 2, SI-1000 Ljubljana; University of Ljubljana, Faculty of Theology, Institute for the Bible, Judaism and Early Christianity; University of Nova Gorica, Faculty of Humanities; irena.avsenik-nabergoj@zrc-sazu.si

## INTRODUCTION

In my article “From Poeticization of the Mission in the Old Testament to Completion of the Mission in the New Testament”, published in 2018 in the journal *Bogoslovni vestnik / Theological Quarterly Ephemerides theologicae*, I paid specific attention to the most important texts of the Old and New Testaments, which speak of national attitudes to God and the vocation of certain biblical individuals in the Old and New Testaments for missionary work. I especially highlighted the role of the Apostle Paul, who is considered the greatest missionary of the first Christian era. In his letters, he justifies the missionary nature of the Church stemming from the Bible. In this contribution, which is the continuation of the previous one, we are particularly interested in the biblical and theological reasoning of the mission itself and the attitude of the Catholic Church to non-Christian religions in the circulars of Pope Pius XI on the Catholic Missions (1926) and in the documents of the Second Vatican Council, in particular in the *Statement on the relationship of the Church to non-Christian religions (Nostra Aetate)*, as a conciliar declaration adopted in 1965). Various church documents from the mid-19th century onwards and more recent specialist theological literature show that the views of the Catholic Church in the modern age have changed in their rationale and realization of the mission.

The Bible texts of the Old and New Testaments show a contrasting relationship between the widening and deepening vision of the prophets, who understood and proclaimed the Holy revelations with an openness to nations, and advocated a narrow, Land of Israel-oriented concept in choosing the Israelites as a special people among all others. In the New Testament, this contrast was so marked that there was a break between Judaism and Christianity. This led to the realization that based on the teachings of Jesus and his examples, the Kingdom of God was intended for all nations. In the New Testament, the mission is based on faith in God, who through his Son, Jesus, acts in the world and mediates God’s love among people. Likewise, missionaries should pass on blessed love and faith in the goodness of God for all humanity who, irrespective of religious diversity and cultural affiliation, all share the same, or similar, fundamental questions about the origin, meaning and purpose of human life.

The establishment of missionary activity in the biblical Book of Wisdom is emphasised by Brian Hearne, who believes that comprehensive understanding and realization of the mission is based on the example of the mission of Jesus, who loved people of all cultures and religions, and who notes: “A lot of thinking about mission and development, in both religious and secular, Catholic and Protestant groups, neglects this rootedness with the ensuing respect for other cultures – the cultures of today, not of yesteryear, for culture is a dynamic and changing thing, not a dead fossil” (Hearne 1993: 94). On the mission, William R. Burrows, emphasizes, above all, the importance of dialogue, which is an essential dimension of the Christian mission, but is not the conversion of people of other religions. Conversion may happen, but

initially through dialogue, as follows: “Christian mission, in a reciprocal dialogue context, is not primarily a matter of converting people from other traditions to belonging to Christian institutions, but of embodying the Spirit of Jesus. Conversions *may* (and *probably* will) develop within the dialogue process” (Burrows 1997: 127–128).

From Paul onwards, some missionaries followed the principle of dialogue with followers of other religions, and as a generally accepted rule, this principle came to the fore only during the transformed understanding of the mission in the 20th century, when a more holistic understanding of the Church’s missionary nature came about upon its return to the sources of the Bible. In the first half of the 19th century, a highly noted circular on Catholic missions was issued by Pope Pius XI on 28 February 1926 entitled *Rerum Ecclesiae* (On Matters of the Church). The circular greatly accelerated the development of the mission between the two world wars. Like the First war, the Second World War greatly restricted missionary activity. The horrors of war that so shook communities and individuals around the world left significant physical and moral devastation behind them. Many unresolved issues accumulated for the missionary activities of the Catholic Church, along with concern for the future fate of the Church around the world. The greatest problem was the lack of educational institutions in missionary countries, which in turn meant a lack of domestic missionaries and missionaries in those places; the issue of how to overcome the legacy of colonialism was especially challenging for foreign missionaries.<sup>1</sup>

These circumstances explain why, on 11 October 1962, Pope John XXIII convened the Second Ecumenical Council of the Vatican; or Second Vatican Council. At this assembly, the bishops of all the churches discussed the Church’s issues in their entirety; its science or doctrine, its liturgical practice, and the fundamental religious truths.<sup>2</sup> The interpretation of the missionary nature of the Church at the Second Vatican Church Assembly is based on the Bible and on the history of the Church: “From that history, one learns what the Church understands her mission to be; it is a story with many stages and shows an evolution in the thought and practice of mission in and to the world” (George 2008: 287).

---

1 After World War I affected missionary activities, on 20 November 1919 Pope Benedict XV, who advocated the de-Europization of Catholic missions, invited Catholic missionaries from around the world to support missions and develop local missionaries. This was followed by Pope Pius XI, who personally ordained bishops from Asia, Africa and Latin America every year, so that at his death, 240 dioceses and administrations were in the hands of domestic bishops.

2 The assembly is supposed to extend to the entire inhabited world, as indicated by the word “ecumenical”, which is of Greek origin meaning “inhabited”. In the first centuries of Christianity, the Ecumenical Council represented the assembly of all Christian Churches, and after the split between East and West in 1054, opinions changed about which churches should be included to ensure the council remained ecumenical. Today, Catholics and Orthodox Christians, as well as some Protestants, recognize the authority of the first seven Ecumenical Councils; in the subsequent councils, there are differences in this respect. For a chronological overview of the conciliar see Strle 2004: 18–20; Flinn 2007: 193–197.

## HISTORICAL MILESTONES OF THE CHURCH'S MISSIONARY ACTIVITY UP TO THE SECOND VATICAN COUNCIL

For a holistic understanding of the role of the mission in the Church, one must always take into account the authority that Jesus gave to his apostles in Galilee after his resurrection: "Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit" (Matt 28:19).<sup>3</sup> The apostles of Jesus, therefore, are "sent" (lat. *mittere*) by this universal authority.

On this basis, the singular concept of the "mission" means that the entire activity of the Church is about the continuation of the Kingdom of God on Earth, and the plural form has a narrower meaning and refers to forms of evangelization – inviting people to a relationship with God through Jesus Christ, usually with a missionary some distance from their homeland, and often in a context that is alien to their social and cultural background. The Apostle Paul is often considered to be the first true missionary and the most versatile interpreter of Jesus' authority, although by the beginning of his work, the Church had already expanded geographically. He and other apostles performed missionary activities in the biblical lands and in the surrounding regions of the Roman Empire, while Emperor Constantine (272–337) allowed the Christian Church to freely undertake missionary activity throughout the Roman Empire. In the period from the 6th to the 9th century, several great missionaries spread Christianity among the Germanic (St Boniface) and Slavic peoples (Sts Cyril and Methodius), but in the 8th century, the Church's missionary activity was halted by the expansion of Islam.

The split of the former Roman Empire into the east and the west in 1054 marked the beginning of the weakening of the eastern empire due to the spread of Islam, which led to the Crusades, the rise of the caliphates and eventually the Turkish empire. The split between the eastern and western churches led the Catholic Church to assert its missionary theology and practice in terms of dialogue in relation to non-Catholic Christian denominations and non-Christian religions. Cultural differences were increasingly reflected during the development between the eastern and western parts of the former Roman Empire that also significantly influenced economic and political relations. In the 16th century, the advent of Protestantism caused a similar split in the Western Church. The Council of Trent, held in Trident (nowadays Trento, Italy) in 1545–1563, was the response to the challenge of Protestantism, which at the same time encouraged intensified missionary activity by the newly founded Jesuits (in 1540). Some great missionaries emerged from this order, paving the way towards the Far East. In 1552, Francis Xavier arrived in India along with 50 brothers. From 1580, Mateo Ricci spread the Jesuit order in China; during that time, the mission was also begun in Japan, and, in 1549, the Jesuits reached the Portuguese colony of Brazil. The Jesuits introduced a new approach to the mission by adapting to the

---

3 The outline that follows is based on the article "Missions" (Flinn 2007: 455–459).

original culture of new missionary countries. The published condemnation by Pope Clement XI, *Ex illa die* (19 March 1715), halted the mission in the region by banning Jesuit missionary activity in China.

In western Europe, from the 16th century onwards, we witness the accelerated development of science, the great discovery of new worlds, and the spread of global colonial empires such as Spain, Portugal and France. During that time, through cooperation between the missionaries and the colonial authorities, the spirit of the mission departed from the spirit of Jesus' authority to the apostles. The darkest form of this cooperation was the introduction of the Inquisition. The leadership of the Church responded to the new challenges through the increased centralization of the Church's missionary work around the world. Pope Gregor XV founded the Central Vatican Office for Missions in 1622, called the Congregation for Propagation of the Faith. After the Second Vatican Council in 1969, this institution was renamed the Congregation for the Evangelization of Peoples. The centralization of the mission resulted in the missionaries being bound to the western form of the Catholic Church, such that the Church in the new missionary countries, for example in Africa and Asia, was considered a foreign institution, which in some cases led to resistance from the local authorities.

At the end of the 18th century, the expansion of the mission ceased due to a ban on the activities of the Jesuit Order and by the French Revolution. The rapid expansion of the British colonial empire began at that time, which supported an intensive mission of Protestant confessions, as with the Methodists and Baptists. At the First Vatican Council, held in 1870 at the Vatican itself, the papal primacy (championship) was confirmed and the rule of papal infallibility was established. This caused a degree of disarray, since some did not agree with the infallibility of the Pope. The Old Catholic Church was formed, which does not recognize this provision. The Council Fathers also established the definition of Catholic faith within the *Dei Filius* doctrinal constitution, which deals with the fundamental question of reciprocity between faith and reason. During this period missionary activity was accelerated by the large orders. Competition between Protestant and Catholic missions in the 20th century encouraged efforts to collaborate in an ecumenical spirit. One of the fruits of the ecumenical approach to missions was a return to the sources of the Bible in substantiating and justifying the mission's purpose. On the Protestant, as well as on the Catholic side, the specialised subject of "missionology" was introduced at theological schools during the 19th and 20th centuries.

After the Second World War, Church missionary activity found itself faced with the significant challenge of liberating large nations from colonial rule. The United Nations was founded in 1946, India gained independence in 1947, and the communist People's Republic of China was established in 1949. A powerful "Liberation Theology" movement began in South America. New challenges following the Second World War gave rise to Pope John XXIII's (1958–1963) idea of convening the Second Vatican Council. The Pope opened it on October 11, 1962, and, after his death, it was

continued and closed by Pope Paul VI (1963–1978).<sup>4</sup> In his brief outline of the importance of the Second Vatican Council, Frank K. Flinn highlights the essence of the epochal novelties of this Council:

Vatican Council II served as a watershed even in changing perspectives on the Church's missionary life. The various documents from the council emphasized the primacy of God in the church's mission. God sends the Son into the world followed by the activity of the Holy Spirit. The church, as a community of the people in relation to God, participates in God's activity in the world. Mission is the work of the church, that is, all God's people.

This new approach to mission would have the church do mission as the "re-presentation" of Christ to the world. It also calls for a revised understanding of those people who have adhered to another faith either by birth or adult choice. The council saw it important to affirm the existence of other religions and the good that they represent in *Nostra Aetate*, the Declaration on the Relation of the Church to Non-Christian Religions. In the future, dialogue with other religions became a part of the Church's mission. (Flinn 2007: 458)

The great emphasis of the Second Vatican Council was on the relationship of the Church to other religions and in promoting dialogue to also include greater openness to the idea of inculturation in terms of adapting to the cultures of missionary countries, and, above all, to the fulfilment of the biblical requirement for liberating the poor, the oppressed and the suffering.

To fully understand the changes brought by the Second Vatican Council, one must turn to the major official documents of the Catholic Church, which define the rationale, purpose and nature of the mission. Among these documents, attention is directed to the Catholic understanding of the mission in two documents: the encyclicals of Pope Pius XI on the advancement of sacred missions, *Rerum Ecclesiae* (dated 28 February 1926), and the statement by the Second Vatican Ecclesiastical Council on the relationship of the Church to non-Christian religions, *Nostra Aetate* (dated 28 October 1965).

We shall provide a brief overview of how the *Rerum Ecclesiae* (On matters of the Church) circular, which the "missionary" Pope Pius XI issued on 28 February 1926,<sup>5</sup> helped to explain the concept of the missions as it prevailed in the first half of the

4 The Council or universal church assembly is the "meeting of the bishops of the Catholic Church from around the world" who want to "express (and develop) a living (based on the scriptures) the traditional and religious conscience of the entire Church" (see Strle 2004: 15). In it, "the entire episcopate under the Pope's presidency is consulted and takes decisions in a collegial act" (ibid.).

5 The encyclical with commentary was published in Slovene as a manuscript at Christmas 1943 in Ljubljana. The manuscript was issued by the Missionary Youth Association with the permission of the Directorate of the Missionary Society.

20th century. The encyclical of 34 articles contains instructions for missionary work in Christian lands and instructions for work in missionary countries. In the introduction, the Pope clearly indicates that the term “mission” is understood as a way of spreading the Christian Gospel to remote lands and places where the gospel has not yet penetrated. All emphasis is placed on establishing the Catholic Church in places where it has not reached. However, since the Church cannot be established without native believers, it is necessary to consolidate it in these countries and become rooted in order to obtain “homeland” rights in the new missionary country.

In the third article of the encyclical, Pope Pius XI reveals his vision of the missionary activity in the Catholic Church. It not only emphasizes missionary work in non-Christian lands, bringing their abilities in various fields and in spreading the goodness of the Christian faith, but also their role in educating believers to take up missionary work. In addition, he mentions the lack of missionaries resulting from the First World War, which severely curbed the Church’s missionary activity. In the second part of the encyclical, he addresses believers and missionaries in the missionary countries, and encourages priests (missionaries) to become local. In this way, the most important goal of the mission could be achieved, namely that the Catholic Church in the missionary country not only becomes established, but also becomes consolidated. This aim is based by reference to the apostolic age of the first Christian community. In his words, the apostles and their immediate heirs always spread the gospel such that some believers, in some places, convert, followed immediately by one of the new communities coming to the fore. As mentioned in the encyclical, concern for the education of local priests (missionaries) includes establishing missionary seminaries. Missionaries should also be of valuable help to catechumen being raised by the missionaries in special schools.

The encyclical recommends establishing hospitals, pharmacies, schools and various institutions, such as trade associations; establishing universities; an emphasis on Catholic intellectuals; care for students from missionary countries studying in Europe and America; preparing native Catholic teachers to assume responsible service in a missionary country; collaboration between scientists in Christian countries with scientists in missionary countries; studying all fields of the culture in specific missionary countries, and infusing those cultures with Christian thought; creating native Christian art, etc.<sup>6</sup>

---

6 This line of thought matches the term “inculturation”, which guides more and more missionaries these days. For the meaning of the term “inculturation” see Flinn 2007: 362.

## THE MISSION IN DOCUMENTS OF THE SECOND VATICAN COUNCIL: A RETURN TO SOURCES AND INTERFAITH DIALOGUE

At the time of the Second Vatican Ecumenical Council, the composition of the bishops' assembly was quite different from the current arrangements, especially regarding the so-called "mission territories". Around 2,090 bishops came from the Americas and Europe, 408 from Asia, 351 from Africa, and 74 from Oceania. The majority of bishops who came from missionary zones were Europeans and belonged to missionary institutions. It was the bishops from the missionary regions, in particular, who brought with them missionary issues and experiences that called for a return to biblical sources. The Second Vatican Church Assembly brought the most innovation in its emphasis on the need to return to the sources, and opening the possibility of a better interfaith dialogue.

In relation to other religions and to the mission, the assembly developed conciliar documents in Latin, which are presented in the chronological order of the bishops and theology as follows: Constitution on Sacred *Liturgy* (*Sacrosanctum concilium*), adopted and confirmed on 4 December 1963; Declaration on the Relationship of the Church to non-Christian religions (*Nostra aetate*), adopted and approved on 28 October 1965; Dogmatic Constitution on the Church (*Lumen gentium*), adopted and approved on 18 November 1965; Decree on Mission Activity of the Church (*Ad gentes*), adopted and approved on 7 December 1965; and the Pastoral Constitution on the Church in the Modern World (*Gaudium et spes*), adopted and approved on 7 December 1965.<sup>7</sup>

### Constitution on Sacred Liturgy, *Sacrosanctum concilium* (1963)

The primary innovation of the Second Vatican Council is that in its interpretation of the nature and purpose of the liturgy it not only addresses Christian believers, but all humankind. At the end of the second article, and on the basis of biblical sources, the constitution highlights the task of the Catholic Church to proclaim Christ to those who are outside the Church. The Church should "lift up a banner for the nations" (Isa 11:12), "under which the scattered children of God are gathered" (John 11:52), "that there will be one herd and one shepherd" (John 11:52). The 5th article of the first chapter of the constitution describes Paul's proclamation of the will of God "who desires everyone to be saved and to come to the knowledge of the truth" (1 Tim 2:4). In the 9th article, the constitution highlights the mission of the Church to prepare people of all nations for worship of the liturgy, and states Paul's dilemma: "But how are they to call on one in whom they have not believed? And how are they to believe in

7 For more on the course and the meaning of the Second Vatican Church Assembly, see Flannery 1992; Strle (ed.) 2004, Lamb, Levering (ed.) 2008; Marchetto 2010; Faggioli 2012 etc. In Slovene, the most comprehensive description of the Second Vatican Council can be found in Strle (ed.) 2004.



one of whom they have never heard? And how are they to hear without someone to proclaim him? And how are they to proclaim him unless they are sent?" (Rom 10:14-15). In the second paragraph of its 9th article, the answer is provided: "Therefore the Church announces the good tidings of salvation to those who do not believe, so that all men may know the true God and Jesus Christ whom He has sent and may be converted from their ways, doing penance" (e.g. John 17,3; Luke 2:47; Acts 2:38).

Gerald O'Collins devotes special attention to those elements of the constitution that cover the proclamation of the gospel to all humanity, and states: "Right from the first important text promulgated by the Council, we can see how the salvation of all humanity stood high in the spiritual imagination and agenda of the bishops and their advisors at Vatican II" (2013: 68). The emphasis on the salvation of all mankind does not mean a break with the previous history of the Church – on the contrary. In the constitution, the Church Fathers showed that "that the council be interpreted in continuity with the great tradition of the Church, including the teachings of earlier councils" (Cessario 2008: 130).

### **Dogmatic Constitution on the Church, *Lumen gentium* (1964)**

Some commentators of this constitution described it as "revolutionary" in its presentation of the nature, mission and structure of the Church. A deeper look at its sources reveals that in reality the novelties stem from a deeper and broader understanding of the primary sources of Christianity, as Dulles finds: "Any aggiornamento that it accomplished was intrinsically connected with the principle of ressourcement" (Dulles 2008: 26). The constitution in the introductory article frames the Church on the basis of biblical and patristic statements.

Article 17 begins with the declaration in the Gospel of John that Jesus sent the apostles, as the Father sent the Son (cf. John 20:21), and Jesus' authorization of the apostles to announce the gospel to the all (Matt 28:18-20). An important novelty of the constitution is its definition of the attitude of missionaries of the Catholic Church to members of non-Christian religions. In the rituals and cultures of various non-Christian nations, the church should accept all goodness from the heart and spirit of the people. With the vision of the prophet Malachi for spreading the name of God "among nations" (1,11), the Church shall also strive for the whole world to worship the Creator and the Father of Universe. In-depth descriptions of the basics of Christian faith and the life and activities of the Church in relation to other religions contained in the constitution of *Lumen gentium* are based on the biblical faith in God, which, through its creative work, invigorates, enlightens and consecrates all things and all people.

The Constitution stems from an important theological premise that God the Creator gives all people a voice of conscience and longing for good; therefore a person finds their way on their life path by different and various means. Christ's divine presence and grace are intended to inspire all people with the desire for unity.

## Declaration on the Relationship of the Church to non-Christian religions, *Nostra aetate* (1965)

On 7 December 1965, the Council Fathers adopted and confirmed the declaration on the missionary activity of the Church entitled *Nostra aetate*. This document laid the foundations for seeking the common core values and truths of all religions and for the development of interfaith dialogue, which remains a universal endorsement today. This is a shorter document of 5 articles; here we cite only the first paragraph of the first article:

In this age of ours, when men are drawing more closely together and the bonds of friendship between different peoples are being strengthened, the Church examines with greater care the relation which she has to non-Christian religions. Ever aware of her duty to foster unity and charity among individuals, and even among nations, she reflects at the outset on what men have in common and what tends to promote fellowship among them. (Flannery 1992: 738)<sup>8</sup>

In the light of these and other fundamental questions raised by people across the world, the statement in Article 2 positively assesses the Church's stance towards Hinduism and Buddhism. Of Hinduism it writes: "In Hinduism men explore the divine mystery and express it both in the limitless richness of myth and the precisely defined insights of philosophy. They seek release from the trials of present life by ascetical practices, profound meditation and recourse to God in confidence and love" (Flannery 1992: 739). It also gives a positive assessment of Buddhism: "Buddhism in its various forms testifies to the essential inadequacy of this changing world. It proposes a way of life by which men can, with confidence and trust, achieve a state of perfect liberation and reach supreme illumination either through their own efforts or by the help of divine help ..." (Flannery 1992: 739). The positive acceptance of non-Christian religions is dictated by the statement of principle in the second paragraph of Article 2: "The Catholic Church rejects nothing of what is true and holy in these religions ..." (Flannery 1992: 739).

In its emphasis on the need for brotherhood between all people (Article 5) the *Nostra Aetate* declaration devotes more attention to Hindu and Buddhist devotees than to Muslims (Article 3), and pays particular attention to the Jews (Article 4). As it notes, Christianity is most closely connected with Judaism, the unique role of the Jews as God's chosen people, and His special commitment to them, as Israel was

8 The *Nostra Aetate* declaration takes humanity as a single communion, which has the same origin and purpose for God. The text of the declaration is reminiscent of Wisd. of Sol. 8:1; Acts 14:16-17; 17:26; Rom 2:5-11; 1 Tim 2:4; Rev 21:23-24 (cf. second paragraph of the first article), taken as a return to the biblical basis. In the third paragraph, we find that the unity of all humanity determines the most primordial/original issues that are the same for all individuals and all nations at all times. These are questions about the meaning and purpose of human life, the nature of suffering, etc.

chosen, by way of the “God of Israel” revelation, to pass on to other nations “a way of understanding other religions in their accounts of a transcendent eternal being and the different visions of human release from suffering and evil” (Kennedy 2008: 405).

### **Decree on the Mission Activity of the Church, *Ad gentes* (1965)**

The introductory article of this document begins with the declaration that God sent the Church to the nations to be the universal sacrament of salvation. As the text emphasizes, the Council wishes to set out the principles of missionary activity as the intention to spread the Kingdom of Christ. The decree first describes the trinitarian foundations of the Mission.

The justification and foundation of the Mission’s trinitarian principle relies on classic biblical texts that tell of God’s plan of salvation, which is for all people: John 11:52; Acts 4:12; 2 Cor 5:19; 1 Tim 2:4. As pointed out, Jesus’ mission represents a call to the missionary activity of the Church: “What the Lord preached that one time, or what was wrought in Him for the saving of the human race, must be spread abroad and published to the ends of the earth (Acts 1:8), beginning from Jerusalem (cf. Luke 24:27), so that what He accomplished at that one time for the salvation of all, may in the course of time come to achieve its effect in all” (Flannery 1992: 815). In the first chapter we also find a clear indication of the word “mission” as understood by the Second Vatican Church assembly:

“Missions” is the term usually given to those particular undertakings by which the heralds of the Gospel, sent out by the Church and going forth into the whole world, carry out the task of preaching the Gospel and planting the Church among peoples or groups who do not yet believe in Christ. These undertakings are brought to completion by missionary activity and are mostly exercised in certain territories recognized by the Holy See. The proper purpose of this missionary activity is evangelization, and the planting of the Church among those peoples and groups where it has not yet taken root. (Flannery 1992: 817)

The second chapter of the decree mainly highlights the task of carrying out the mission, meaning testimony of life, conversion. The biblical basis for understanding conversion is not foremost for people transitioning from one religion to another, but it is the conversion of the heart according to God’s will, which, according to the prophets, is universal, and therefore directly or indirectly includes all people of the world.

The mission pays attention to the form of Christian communion (Article 15), the training of local priests (Article 16), the training of catechists (Article 17) and a fostering of normal life (Article 18). Chapter 3 is dedicated to the mission work of the regional churches, Chapter 4, training of the missionaries, Chapter 5 to the regulation of mission activity, and Chapter 6 to the duty of the entire Catholic Church to implement the mission.

The purpose of the Second Vatican Council was not to establish a new basis for the mission, but to deepen understanding of the mission. In this, the universal church assembly proceeded from the belief of the uniqueness and universality of Jesus Christ, which brings complete salvation to all people.

### **Pastoral Constitution on the Church in the Modern World, *Gaudium et spes* (1965)**

The basic content of this document is clearly expressed in the introductory paragraph to the forward:

The joy and hope, the grief and anguish of the men of our time, especially of those who are poor or afflicted in any way, are the joy and hope, the grief and anguish of the followers of Christ as well. Nothing that is genuinely human fails to find an echo in their hearts. For theirs is a community composed of men, of men who, united in Christ and guided by the Holy Spirit, press onwards towards the kingdom of the Father and are bearers of a message of salvation intended for all men. That is why Christians cherish a feeling of deep solidarity with the human race and its history. (Flannery 2008: 903–904)

Starting from the conclusion of the first biblical account on creation (Gen 1:26; cf. Wisd. of Sol. 2:23; Sir 17:3-10), the constitution elevates the biblical teachings of human godliness and its ability to know and love their Creator (Article 12, paragraph 3). Based on Paul's well-known explanation of conscience bearing witness, which is written in the hearts of men in Romans 2,14-16, Article 16 proclaims the dignity of man's conscience. As Article 16 states, conscience is about human dignity and the possibility of personal connection with God. Human godliness should be reflected in the fact that everyone poses the same fundamental questions about the origin, meaning and purpose of life (Articles 3, 4, 10, 21). They also receive the gift of faith in the Holy Spirit (Article 15). According to text in Article 38, Christ, who rose from the dead in Christianity, acts in the hearts of human beings.

Recognizing the interconnectedness of the whole of mankind "there is a growing awareness above all things and whose rights and duties are universal and inviolable" (Article 26, paragraph 2). Christ proclaims human freedom, rejects hatred and establishes the form of love (Article 41). From the beginning to end, the constitution approves and encourages dialogue and cooperation with people of all nations, religions and cultures. In particular, it emphasises interfaith dialogue in the quest for justice and peace (Articles 3, 4, 11, 28, 40, 44, 84, 92), thus justifying the Catholic understanding of the missionary nature of the Church. For example, in the first paragraph of Article 28, we read: "Those also have a claim on our respect and charity who think and act differently from us in social, political, and religious matters. In fact the more deeply we come to understand their ways of thinking through kindness

and love, the more easily will we be able to enter into dialogue with them" (Flannery 2008: 928–929).

The religious foundation of the mission of the Church means that it is not tied to any economic, social or political system. Nevertheless, it must strive for respect of the law, personal rights and religious freedom. Evangelization can only achieve its goal when members of other religions and beliefs freely and absolutely choose to receive the gospel in recognition of its universal value.

## SIGNIFICANCE OF THE MISSION'S CONCEPTUAL DIMENSIONS OF INCULTURATION AND EVANGELIZATION IN RECENT THEOLOGICAL LITERATURE

Following the Second Vatican Ecclesiastical Council, most debate about the documents of this church council focus on the question of whether they represent the restoration of the Church in unbroken continuity with the two-thousand-year-old tradition or, in contrast, break with tradition. At the centre of attention are the terms "inculturation" and "evangelization" and their reciprocity. We are interested in how questions about the mission are answered in recent studies. We established that the most important recent studies are derived from biblical sources and patristic explanations, and also take into account recent searches into anthropological argumentation of the Church's missionary nature. The in-depth writings of all Christian denominations are particularly and primarily interested in biblical sources to understand the mission.<sup>9</sup> It is worth noting the maturing notion of "inculturation" from the official definition of this concept in the 1998 document of the International Theological Commission entitled "Faith and Inculturation". The notion of inculturation as set out in Article 11 of the first part of the document is interpreted as follows:

The process of inculturation may be defined as the Church's efforts to make the message of Christ penetrate a given sociocultural milieu, calling on the latter to grow according to all its particular values, as long as these are compatible with the Gospel. The term inculturation includes the notion of growth of the mutual enrichment of persons and groups, rendered possible by the encounter of the Gospel with a social milieu.

The essential emphasis of the council documents on the attitude of the Church to other religions is recalled in the study *Christianity in India: From Beginnings to the Present* (2008), written by missionary and historian Robert Eric Frykenberg. In his explanation,

9 On the basis of a comparative analysis of the texts of the Old and New Testaments that deal with understanding of the relationship of God to Israel and other nations, in his book, *Mission in the Old Testament: Israel as a Light to the Nations* (2000), Walter C. Kaiser Jr. concludes that not only does the Old Testament have texts that emphasize God's plan of salvation solely for the Israelites, but also poetic descriptions of God's kindness to all nations (see also Ocvirk 2006).

the biblical concept of the mission's purpose reflects the purest aspects of the primeval religion, which is so "universal" that it restricts "no person, culture or religion" and is referred to as "the spark of eternity". As with the Council Fathers, for Frykenberg the most important biblical reasoning for the mission are the doctrines of Jesus, and by his examples that he did not come for the rich, but for the poor who are open to the realization of spiritual truths.<sup>10</sup> Today, more and more missionaries choose to live among people of other faiths and to work without any intention of turning them into a Christian community.

Even in his influential book, *Transforming Mission: Paradigm Shifts and Mission Theology* (Bosch 1991, 2011), the Protestant biblical exegete David Bosch builds his views on the mission on biblical grounds, especially on the gospel of Luke, apostolic works and the writings of Paul. For me as well, the challenges of time require a more in-depth theological approach, based on biblical hermeneutics. As a basis, "the first and cardinal change in the paradigm took place with the coming of Jesus of Nazareth and with what followed" (Bosch 2011: 15).

In his article "New Models of Mission" (1993), Brian Hearne concludes his commitment to the mission's holistic lifestyle and dialogue approach by noting that in the modern globalized world, what man most misses is the dialogue on the fundamental issues of life. In his opinion, the third millennium will see dialogue between people of different cultures, religions and beliefs and will take place on this basis: "What is needed is communication among people about the values, problems, joys and sorrows, hopes and fears of their lives ... Could we say that mission is about simplicities like affection and friendship, but extending them beyond the limits of one's own country, language, culture and religion?" (Hearne 1993: 97). Several other authors of scientific contributions to the mission also consider this approach.<sup>11</sup> In the *Nostra Aetate* declaration, Article 3 highlights "simple things" when it refers to the attitude towards Muslims: "Over the centuries many quarrels and dissensions have arisen between Christians and Muslims. The sacred Council now pleads with all to forget the past, and urges that a sincere effort be made to achieve mutual understanding; for the benefit of all men, let them together preserve and promote peace, liberty, social justice and moral values."

## CONCLUSION

In the New Testament, an image of the Church emerged which was missionary by its very nature. The Mission, also by its very nature, is concerned with the entire community, and less concerned about the wishes and interests of individuals. At the same time, a missionary can only be such when authorised by the Church. Throughout

<sup>10</sup> See also Craig Ott 2010.

<sup>11</sup> Wonderly, Nida 1963; Burrows 1997; Ott 2001; Ma 2007; Ma 2009.

its missionary history, and although the missionary nature of the Church had been inspired by missionary activity, the expansion of the mission created new tensions between the deepening spiritual understanding of missionary work and various forms of political interest connected with economic and cultural colonialism. Due to this fundamental tension, the universal leadership of the Church had to remain alert regarding the course of the missions. The most important task of the Ecumenical Councils from antiquity to the present time has been the self-understanding the nature of the Church, which at the same time signifies the self-understanding of the Church regarding its mission.

With the outbreak of World War I and the onset of globalization that overran the world, the Church leadership had to respond to the challenges of economic, political, educational and cultural cooperation among all nations. This challenge caught the attention of the Council Fathers at the Second Vatican Council, who sought clear and unambiguous sayings from primary sources of the Holy Scriptures and texts of the Church Fathers about the missionary nature of the Church as the universal communion of man. It was for those who craved for the same, or a similar, way to happiness and love, as well suffering from its limitations in the same or similar ways. Returning to the spiritual sources of the Bible, whose messages reach their peak through the commandment of a love for God and one's fellow man, allows the continuous purification of the hermeneutics of the mission, both at the institutional level and at the level of living the truth according to the God's design and a love for all people of the world.

The fundamental principle of the direction taken by the Second Vatican Council is a return to the sources, and a theology that means returning to the biblical hermeneutics that are integral to, and based on, the idea of one God as the beginning and the end of the entire human history. According to biblical thought, God calls on "nations" to know the universal plan of salvation, with Israel chosen for an intermediary missionary role in relation to the "nations". The New Testament places God at the very centre of understanding, calling all nations to salvation. The New Testament specifically highlights the universality of natural law (conscience) and the gospels of Jesus on reciprocity between the commandments of love of God and love for one's fellow man. If love for one's fellow man is a measure of the fulfilment of the commandment of a love of God, it is clear that this reciprocity is the basis for the Church's attitude towards those who are not members of Christian communities, since the Bible acknowledges the spiritual greatness of all people on earth. Jesus and Paul, the prophets of the Old Testament, considered as the first missionaries of the nations, placed conversion at the centre of their proclamations. They were aware that the divine call to convert was primarily for them – meaning, that it is regarded as the basic guide of missionaries at all times. Conversion, by its very nature, means the realization of a dialogue with people of all nations, cultures and religious beliefs, or customs.

## REFERENCES

- Avsenik Nabergoj, Irena (2018). Od poetizacije poslanstva v Stari zavezi do polnosti misijona v Novi zavezi. *Bogoslovni vestnik* 78/3, 679–694.
- Bosch, David J. (1991, 2011). *Transforming Mission: Paradigm Shifts in Theology of Mission*. Maryknoll, NY: Orbis Books (American Society of Missiology Series; 16).
- Brock, Peggy (2005). *Indigenous Peoples and Religious Change*. Leiden, Boston: Brill (Studies in Christian Mission; 31).
- Burrows, William R. (1997). Christian Mission and Interreligious Dialogue: Mutually Exclusive or Complementary? *Buddhist-Christian Studies* 17, 119–130.
- Cessario, Romanus (2008). The Sacraments of the Church. *Vatican II: Renewal Within Tradition* (eds. Matthew L. Lamb, Matthew Levering). Oxford: Oxford University Press, 129–146.
- Dulles, Avery Cardinal (2008). Nature, Mission, and Structure of the Church. *Vatican II: Renewal Within Tradition* (eds. Matthew L. Lamb, Matthew Levering). Oxford: Oxford University Press, 25–36.
- Faggioli, Massimo (2012). *Vatican II: The Battle for Meaning*. New York, Mahwah, NJ: Paulist Press.
- Flannery, Austin (ed., rev) (1992). *Vatican Council II: The Conciliar and Post Conciliar Documents*. Northport, NY: Costello Publishing Company (Vatican Collection; 1).
- Flinn, Frank K. (2007). *Encyclopedia of Catholicism*. New York: Facts on File: "Missions", 455–459.
- Flinn, Frank K. (2007). *Encyclopedia of Catholicism*. New York: Facts on File: "Councils, Ecumenical", 193–197.
- Frykenberg, Robert Eric (2008). *Christianity in India: From Beginnings to the Present*. Oxford: Oxford University Press.
- Fuchs, Martin, Linkenbach, Antje, Reinhard, Wolfgang (eds.) (2015). *Individualisierung durch christliche Mission? Wiesbaden: Harrassowitz Verlag (Studien zur Außereuropäischen Christentumsgeschichte (Asien, Afrika, Lateinamerika); 24)*.
- George, Francis Cardinal (2008). The Decree on the Church's Missionary Activity, *Ad Gentes*. *Vatican II: Renewal Within Tradition* (eds. Matthew L. Lamb, Matthew Levering). Oxford: Oxford University Press, 287–310.
- Hardiman, David (ed.) (2006). *Healing Bodies, Saving Souls: Medical Missions in Asia and Africa*. Amsterdam, New York, NY: Editions Rodopi.
- Hearne, Brian (1993). New Models of Mission. *The Furrow* 44/2, 91–98.
- International Theological Commission (1988). *Faith and Inculturation*, [http://www.vatican.va/roman\\_curia/congregations/cfaith/cti\\_documentscti1988fe](http://www.vatican.va/roman_curia/congregations/cfaith/cti_documentscti1988fe).
- Jackson, Pamela E. J. (2008). Theology of the Liturgy. *Vatican II: Renewal Within Tradition* (eds. Matthew L. Lamb, Matthew Levering). Oxford: Oxford University Press, 101–128.
- Kaiser Jr., Walter C. (2000). *Mission in the Old Testament: Israel as a Light to the Nations*. Grand Rapids, MI: Baker Books.



- Kennedy, Arthur (2008). The Declaration on the Relationship of the Church to Non-Christian Religions, *Nostra Aetate*. *Vatican II: Renewal Within Tradition* (eds. Matthew L. Lamb, Matthew Levering). Oxford: Oxford University Press, 397–409.
- Lamb, Matthew L., Levering, Matthew (2008). *Vatican II: Renewal Within Tradition*. Oxford: Oxford University Press.
- La Soujeole, Benoît-Dominique (2008). The Universal Call to Holiness. *Vatican II: Renewal Within Tradition* (eds. Matthew L. Lamb, Matthew Levering). Oxford: Oxford University Press, 37–53.
- Levering, Matthew (2008). Pastoral Perspectives on the Church in the Modern World. *Vatican II: Renewal Within Tradition* (eds. Matthew L. Lamb, Matthew Levering). Oxford: Oxford University Press, 165–183.
- Ma, Julie (2009). Eschatology and Mission: Living the “Last Days” Today. *Transformation* 26/3, 186–198.
- Ma, Wonsuk (2007). The Spirit of God in Creation: Lessons for Christian Mission. *Transformation* 24/3–4, 222–230.
- Marchetto, Agostino (2010). *The Second Vatican Ecumenical Council: A Counterpoint for the History of the Council*. Chicago, IL: University of Scranton Press.
- Martens, Elmer A. (2007). Impulses to Mission in Isaiah: An Intertextual Exploration. *Bulletin for Biblical Research* 17/2: 215–239.
- Ocvirk, Drago (2006). *Misijoni – povezovalci človeštva: Krščansko misijonstvo v univerzalizaciji človeštva*. Ljubljana: Družina (Znanstvena knjižnica; 8).
- O’Collins, Gerald (2013). *The Second Vatican Council on Other Religions*. Oxford: Oxford University Press.
- Ott, Bernhard (2001). Mission and Theological Education. *Transformation* 18/2, 87–98.
- Ott, Graig, Strauss, Stephen J., Tennent, Timothy C. (2010). *Encountering Theology of Mission: Biblical Foundations, Historical Developments, and Contemporary Issues*. Grand Rapids, MI: Baker Academic.
- Pius XI., pope (1926). *Rerum Ecclesiae = Encyclical of Pope Pius XI on Catholic Missions*. Rome: Libreria Editrice Vaticana, http://analytics.catholica.va/piwik/piwik.php?idsite=56
- Shorter, Aylward. 1992. *Toward a Theology of Inculturation*. Maryknoll, NY: Orbis Books.
- Strle, Anton (ur.) (2004). *Koncilski odloki: Konstitucije, odloki, izjave, poslanice 2. vati-kanskega vesoljnega cerkvenega zbora (1962–1965)*, slovenski prevod s splošnim uvodom in posebnimi uvodi k posameznim dokumentom / [avtor: Oecumenicum concilium Vaticanum (2; 1962–1965; Rim); besedilo dokumentov, ki so v slovenskem prevodu prvič izšli v snopičih v letih 1964–1966, izpopolnil, napisal splošni uvod in uvode k posameznim koncilskim dokumentom Anton Strle]. Ljubljana: Družina.
- Wonderly, William L., Nida, Eugene A. (1963). Linguistics and Christian Missions. *Anthropological Linguistics* 5/1, 104–144.

## POVZETEK

### MISIJSKO POSLANSTVO CERKVE V DIALOGU Z NEKRŠČANSKIMI VERSTVI

Irena AVSENIK NABERGOJ

Članek skuša dognati, kako so zgodovinske okoliščine v obdobju dva tisoč let, predvsem pa od 19. stoletja, krepile ali zavirale misijonsko miselnost in dejavnost Cerkve. Posebna pozornost velja dokumentom Drugega vatikanskega koncila, ki je s spodbujanjem dialoga znotraj krščanskih cerkva in v razmerju do nekrščanskih verstev celostno združil pogled v zgodovino, sedanje stanje in vizijo prihodnosti. Namen natančnejše analize dokumentov, ki opredeljujejo naravo Cerkve glede na njeno misijonsko poslanstvo, je uvid v kompleksnost dejavnikov, ki so pripomogli, da je Drugi vatikanski cerkveni zbor vse prejšnje koncile in cerkvene dokumente presegel s sintetičnim spajanjem vračanja k svetopisemskim virom, s pozornostjo na strahove in upe narodov v sedanjem globalizacijskem procesu in z vizijo prihodnosti, ki jo omogoča le volja po dialogu v duhu solidarnosti z vsemi, ki priznavajo univerzalne duhovne razsežnosti človekovega bivanja in iščejo nove poti k premagovanju medsebojne odtujenosti.

V 20. stoletju je zaradi nacionalističnih spopadov med narodi, ki so povzročili prvo in drugo svetovno vojno, nastopila kriza. Kriza pa je obenem postala tudi nova priložnost za čistejše razumevanje misijona, kar pomeni vračanje k prvobitnim virom njegovega razumevanja in izvajanja. Takšen odziv lahko zasledimo v okrožnici »misijonskega« papeža Pija XI. iz leta 1926 (*Rerum Ecclesiae*). Po zastoju misijonske dejavnosti zaradi druge svetovne vojne se je v Katoliški cerkvi zgodil največji premik, ki je na globalni ravni zaznamoval ekumensko usmeritev v odnosu med krščanskimi veroizpovedmi, v odnosu do judov, islama, hinduizma in budizma, pa tudi širše v odnosu do narodov, kultur in religij sveta. Vse to je vplivalo na odločitev, da je težišče pričujočega članka odkrivanje bibličnih osnov razumevanja misijona v naslednjih dokumentih: Dogmatični konstituciji o Cerkvi, *Lumen gentium* (1964), Izjavi o razmerju Cerkve do nekrščanskih verstev, *Nostra aetate* (1965), Odloku o misijonski dejavnosti Cerkve, *Ad gentes* (1965), in dokumentu o Pastoralni konstituciji o Cerkvi v sedanjem svetu, *Gaudium et spes* (1965). Novosti Drugega vatikanskega koncila presojamo s pregledom novejšje teološke literature o misijonu znotraj Katoliške cerkve in v protestantskih konfesijah, ki je vse bolj ekumenska.

# “OUR BENGAL MISSION”: NEGOTIATION OF NATIONAL AND TRANSNATIONAL AGENDAS BY INTERWAR YUGOSLAV MISSIONARIES IN BENGAL

Helena MOTOH<sup>1</sup>

COBISS 1.01

## ABSTRACT

### “Our Bengal Mission”: Negotiation of National and Transnational Agendas by Interwar Yugoslav Missionaries in Bengal

Contrary to the normative apostolic letter *Maximum illud*, which demanded that missionaries cut their ties with national(ist) and colonial agendas, the missionary project of the Yugoslav interwar missionaries in Bengal was deeply suffused with patriotism, with the newspapers and missionary publications alike portraying the Yugoslav Bengali mission as a symbolic victory of the newly-established Yugoslav state. The present paper aims to interpret this controversy by exploring how men and women missionaries negotiated the conflicting relationship between the transnational missionary project and the nationalist agendas, while also struggling with the controversial decisions of which national agenda to pursue.

KEY WORDS: missionaries, Bengal, Yugoslavia, patriotism, nation

## IZVLEČEK

### »Naš bengalski misijon«: Usklajevanje nacionalnih in transnacionalnih načrtov pri jugoslovanskih misijonarjih in misijonarkah v Bengaliji med obema vojnama

V nasprotju z apostolskim pismom *Maximum illud*, ki je od misijonarjev zahtevalo, da pretrgajo vezi z nacional(istič)nimi in kolonialnimi interesi, je bil misijonarski podvig medvojnih jugoslovanskih misijonark in misijonarjev v Bengaliji globoko prežet s patriotizmom, tako časopisje kot misijonarski tiski pa so jugoslovanski bengalski misijon prikazovali kot simbolno zmago nove jugoslovanske države. Članek želi to protislovje interpretirati z raziskavo načinov, na katere so usklajevali konflikt med transnacionalnim misijonarskim projektom in nacionalističnimi programi, pri čemer so bili pogosto pred težavno odločitvijo, interesom katere nacije naj sledijo.

KLJUČNE BESEDE: misijonarji, Bengalija, Jugoslavija, patriotizem, nacija

<sup>1</sup> PhD in Philosophy, Senior Research Fellow at Science and Research Centre Koper, Garibaldijeva 1, SI-6000 Koper/Capodistria; helena.motoh@zrs-kp.si

## INTRODUCTION

The cover of the February 1933 *Bengalski misijonar* [*Bengal Missionary*], a well-read supplement to the monthly Jesuit journal *Glasnik srca Jezusovega* [*Sacred Heart of Jesus Journal*], featured a telling photo of the 29-year-old Jesuit missionary Stanko Poderžaj, the then-editor of the supplement.<sup>1</sup> The meticulously staged portrait of him, wearing a white cassock and looking pensively into the distance, seems to visually sum up the entire framework of the Yugoslav missionary enterprise in India. Indeed, the journal leaves nothing to the imagination and the introductory piece opens with a detailed description of the photo. Referring to the special occasion of Poderžaj being ordained a priest, the description places the photo “in his study in Kurseong below the Himalayas” (ibid.). Kurseong was the location of St. Mary’s Seminary, an important training and education hub for Jesuit missionaries in Bengal, where most of the Yugoslav missionaries received their education. Poderžaj was part of the second group of Yugoslav Jesuit missionaries who were sent to what was a part of the Belgian Jesuit province in India (see Kolar 1998: 154; Kokalj 1989: 23). The first were the Croatian missionaries Vizjak and Mesarić, who came to India in 1925 and Poderžaj followed suit at the end of 1929 together with two other Slovenian Jesuits, France Drobnič and Janez Udovč (ibid.). The first women missionaries to come to India from Yugoslavia were the Macedonian Albanian Theresa Bojaxhiu alongside the Slovenian Magdalena Kajnc in 1928 (Kokalj 1989: 291). They were followed by a number of other men and women religious,<sup>2</sup> not only to Bengal, but also to other parts of India.

In the abovementioned photo, Poderžaj is portrayed as a new missionary priest, sitting at a table against the background of a bookshelf full of “books he studies”,<sup>3</sup> one of them casually open on the table, and another – “the Bible in the Bengali language” (ibid.) – in his hands. We are told that while holding this book “he reflects on how to spread the word of God to the innumerable souls awaiting him” (ibid.). The most fascinating part of the photo, however, is the decoration on the back wall. Three pictures are displayed, and three maps. Of the pictures – so we are told – two are portraits of the most famous early Slovenian missionaries, Friderik Baraga (1797–1868) and Ignacij Knoblehar (1819–1858). The former with his missionary work in North America and the latter with his pioneering explorations in the White Nile basin, are here interpreted as role models and predecessors in the lineage of *Slovenian* missionary history, “their work and life always a shining example” (ibid.) for Poderžaj. It should be noted that the lineage displayed is not, for example, geographical – he does not honour the “great” Indian missionaries before him. It also does not follow the lineage of the Jesuits, since

1 »Naslovna slika« *Bengalski misijonar* – *Glasnik srca Jezusovega* 1, 1933: 2, 5.

2 In the present paper the term “woman religious” is used in the case of women missionaries as an alternative to the commonly (mis)used term “nun”, since the term women religious emphasizes their choice of the “outward” service of these women in the world as an alternative to the cloistered contemplative life of a nun.

3 »Naslovna slika«, *Bengalski misijonar* – *Glasnik srca Jezusovega* 1, 1933: 2, 5.



Figure 1: Cover of *Bengal Missionary* (February 1933).

neither Baraga nor Knoblehar belonged to the same religious order as Poderžaj. The lineage Poderžaj adheres to with his little improvised "altar" is a national one; what unites the two portraits with him is the fact that they spoke the same language, although it is debatable whether either of those two early-19<sup>th</sup>-century missionaries would identify themselves as "Slovene". At the same time, of course, Poderžaj's homeland is also not "Slovenia" proper, since this political entity was then still over half a century away from formation. He did probably consider himself Slovene, however, even within the so-called "Kingdom of Serbs, Croats and Slovenes", which is what the political entity was called at the time of/just months before the publication. In October 1929, King Aleksandar I Karadjordjević, who had previously abolished the dysfunctional Yugoslav parliament and established a personal dictatorship, changed the name of the country to the "Kingdom of Yugoslavia". The change was not only nominal, for the aim of his politics was predominantly unitarian, aimed at a gradual blending of the three constitutive nations into a single Yugoslav nation. While Poderžaj, we are told in the article, "often thought about his homeland" and remained "in close contact with it" (*ibid.*), what this "homeland" was (or what it was called), was not clearly defined. Not only did the Kingdom of Serbs, Croats and Slovenes change its name merely a month before Poderžaj left home for India, but also the administrative unit governing his hometown changed entirely. King Alexander's reforms transformed the administrative units of the Kingdom of Yugoslavia, erasing any nominal and real ties between these units and the ethnic boundaries. Poderžaj's home region was now called the "Drava River province" ["Dravska banovina"]. Defined by a time when allegiances to

political entities were therefore far from straightforward, one map on Poderžaj's wall, as if to pin down, or centre, the shifting political geographies, is given centre stage. Flanked by two maps of his missionary region in India, and just above Slovenian missionaries Baraga and Knoblehar, is a map of Yugoslavia.

The choice of the wall decoration is not as obvious as it might seem. Just a decade after the papal apostolic letter *Maximum illud*, which aimed at liberating the missionary project from any national, colonial or imperial ties, missionaries like Poderžaj were extremely limited in their expressions of patriotism. Or at least they were supposed to be. However, the reality, as this paper will show, was completely different for Catholic Yugoslav missionaries in India. Their whole undertaking was deeply suffused with patriotism and its changing faces and alliances, following the internal twists and turns in Yugoslav politics and the relations between the state and the Catholic Church.

In this paper, I will therefore address this problematic by analysing the specific case of Yugoslav men and women missionaries in order to explore how they negotiated the conflicting relationship between the transnational missionary project and the nationalist agendas. The main source for the analysis is the Slovenian press in the interwar period, both daily newspapers and missionary publications. Among the main Slovenian newspapers and journals, the developments in the Bengal mission were presented mostly in *Slovenec*, the daily newspaper published by the Slovenian People's Party (see Amon 1996: 88–94). The shifts of political allegiances of the Slovenian People's Party between the two World Wars are reflected in the changing attitudes towards the missionary project, as will be analysed in the paper. Other important sources of reports on the Bengal mission include various religious publications, most notably *Bengal Missionary*, mentioned above, published as a supplement of the monthly Jesuit publication *Glasnik srca Jezusovega*. The missionary enterprise crossed the boundaries of the religious orders, and the development of the Jesuit Bengal mission and the reports of the missionaries themselves also featured in *Katoliški misijoni* [*Catholic Missions*], a monthly journal published by the Congregation of the Mission since 1923 (see Kolar 1998: 184–190). Some reports about and by the missionaries can also be found in the publications of Slovenian religious orders and communities abroad, such as *Ave Maria*, a monthly journal of Slovenian Franciscan Missionaries in the USA. Since the number of articles especially in *Slovenec* and *Bengalski misijonar* allow for the most reliable comparison and analysis in the analysed period, these will be the main focus of the present paper. Since Croatian and Slovenian missionaries both took part in the Yugoslav Bengal mission, the same topic could be approached through the Croatian counterparts, both the daily press and religious publications, but due to the completely different political background of Croatian political life in Yugoslavia, this would require a separate study.

The complex relationship between the transnationalist standard set for the missionaries and the reality of growing nationalist pressure on them in the first half of the 20<sup>th</sup> century has been analysed in more detail in Adrian Hastings' work (Hastings

2003), but he mostly set the issue of the clash between nationalism and transnationalism against the background of Nazism and Fascism. Although in his other work (cf. Hastings 1997) the nationalisms of Yugoslav nations play an important role in his analysis, his writings on missionary nationalism do not reflect this. With the common background of the empires that fell in the early 20<sup>th</sup> century, an interesting analysis was also made by Lehmann (2003), who focuses on German missionary nationalism and transnationalism in the interwar period. Due to the specific situation within the newly formed Yugoslav state and its multi-religious composition, none of those analyses can fully address the issue of the varied national and transnational agendas of the Yugoslav Catholic missionaries between the two World Wars. The relations which marked the nationalist and transnationalist agendas of the Catholic missionaries were not only those between the state and the Church, or the state and its changing international ambitions. In addition to these, the options that the Yugoslav Catholic Church was negotiating in its missionary attempts were also defined by the relations between three main religions in Yugoslavia, between Yugoslavia and the Vatican, and between the different political agendas of the constitutive nations and their political representatives. The ambiguities about what constituted a nation in the Yugoslav context also contributed significantly to the formation of missionary nationalism and transnationalism. Similarly, the issue of the complex position that women missionaries took on the nationalist and transnational agendas has also been researched (see Chaudhuri, Strobel 1992; Wildenthal 2001; Reeves-Ellington et al. 2009 etc.). Most of the analyses of nationalist positions of women missionaries, however, again focus on the experience of the greater nations and their established imperial agendas, where women were merely playing their role. The situation of the Yugoslav women missionaries, on the other hand, was different. The peripheral status of their country of origin marked their personal agendas in a way that their national identifications were greatly watered down by the complicated transnational paths they had to take to become missionaries in the first place, and additionally by the multi-national communities they became part of.

In the present paper I therefore try to look at the particular conditions that defined the national/transnational agendas of women and men missionaries in Yugoslav Bengal mission and to reflect on how their role was interpreted back home. In the first part I analyse the transnationalist turn outlined in Pope Benedict XV's *Maximum illud*. In the second part, I turn to an analysis of the openly patriotic and nationalist agendas of the interwar Yugoslav Catholic mission in Bengal. In the third part, I focus on the context of this patriotic orientation and on its likely causes in the changing(?) relationship between the state and the Catholic Church in Yugoslavia. Finally, I make a distinction between men and women missionaries in relation to the patriotic burden they were supposed to carry and the way they took on this task. This distinction will show that Yugoslav women missionaries inhabited what I refer to as a structural position, which enabled them to have more transnational

allegiances than the strongly patriotic role which was expected of and assumed by the Yugoslav men missionaries.

### **Against the Privatizing of the Vineyard**

Apart from the obvious expressions of homesickness, the missionary's allegiance to his homeland in the interwar period was problematized by the very top of the Catholic hierarchy. Unlike in the previous centuries when missionaries were considered helpful precursors, assistants or allies of the political agendas of their countries and empires, the period after the First World War saw a crisis of this type of alliances (see Hastings 2003). Most notably the crisis sprung from the conflicts with the staunchly national missionary structures devised by French missionaries in China, or even earlier, by the Padroado in the Portuguese colonies, which directly challenged the central authority of the Vatican. The close relationships between the national governments and their missionary outposts outside Europe presented risks at various levels, most often because the interests of the Church and the missionary activities had to be made subordinate to the political interests (ibid.: 16). The fact that the local populations were quick to observe the fact that missionaries had agendas other than just "saving souls" greatly reduced their credibility, and therefore hindered the success of the missionary project. And there were other reasons that made this link an unwelcome liability. In France, for example, the closeness between the missionary enterprise and state politics meant that the Church had to reckon with and negotiate the periodically stronger anticlerical sentiment which entered the highest level of politics (ibid.: 16–18). In order to address these issues and with a more visionary goal of surviving the turbulences stemming from the obviously immanent nationalist struggles arising in Europe as well as the decolonization processes outside the continent, an attempt to reform the overall missionary framework was urgently needed. It resulted in what is undoubtedly one of the most important "missionary" statements by a 20<sup>th</sup> century pope, the 1919 apostolic letter of Pope Benedict XV, *Maximum illud* (see Pollard 2014: 114–116).

The views of the two highest Church authorities met in the shaping of this new orientation. The first was Pope Benedict XV, a rather open-minded pope whose pontificate was marked by the horrors of the First World War and its aftermath. The other was Willem Marinus Van Rossum, the Dutch Prefect of the Congregation for the Propagation of the Faith, whose antinationalist orientation was crucial for the missionary policies of the upcoming new era (see Hastings 2003: 20). Facing harsh opposition in the missions and across Europe, Van Rossum also strongly advocated



the advancement of local clergy to the episcopate, a vision that was to strongly mark the changes in the rest of the 20<sup>th</sup>-century Catholic missions.<sup>4</sup>

The papal apostolic letter starts by emphasizing the importance of missionary work as a direct fulfilment of Jesus' demand of his followers to "Go into the whole world and preach the gospel to all creation" (Benedict XV 1919) and continues with an overview of how Christianity was spread in and outside Europe by a list of missionaries, from Gregory the Illuminator to Francis Xavier (Benedict XV 1919: 4). Then he goes on to assess the size of the task left for the missionaries of his time: "According to a recent estimate, the number of non-believers in the world approximates one billion souls" (ibid.: 6). Comparing this to a statistical analysis *Status of Global Mission* (Status 2013), the Pope's estimate was fairly accurate, and the realistic numerical reference itself is something which gives a new tone to the missionary project.

The sheer dimensions of the task, continues the apostolic letter, call for a serious rethinking of how missionary activities are conducted and organized. In *Maximum illud* Benedict XV makes a distinction between the superiors and their subordinate missionaries. He addresses the former first, and demands of them devotion to their work and prudent governance of the missions and their subordinate missionaries, while also stressing the need for the network of missionary outposts to spread organically (Benedict XV 1919: 11). What is stressed here is that in the common project of bringing faith to the entire world, no area or task can be appropriated by one group only, as it is obviously better for missionaries to join forces should they want success: "If they find that their own order or congregation is not supplying enough manpower for the task, they are perfectly willing to call in helpers from other religious groups" (ibid.).

In an interesting shift, Benedict XV continues by heeding the over-zealous missionary superiors that the "Lord's vineyard" cannot be privatized: "On the other hand, We can hardly commend a man who takes the section of the Lord's vineyard that has been allotted to him for cultivation, and proceeds to treat it as a piece of private property, a domain not to be touched by the hands of an outsider" (ibid.: 12). Never should a superior refuse to seek help from others, he continues. Who are then these "others"?

He does not care who they are; he does not care whether they belong to his order or to another, or whether or not they are of his nationality [...] "And he does not limit his welcome to men, either. He will bring in sisters to open schools, orphanages, and hospitals, to found their hostels and establish other charitable institutions" (ibid.).

Not only were missionaries now supported by members of other congregations, other nationalities and (even!) women, but their main support lay in the future local

---

4 With the exception of a few missionaries, most notably Streicher in Uganda and Lebbe in China, the idea that the presence of European missionaries in the top layers of the local churches could, when sufficiently established, be completely replaced by local clergy (even at the episcopal level) was seen as dangerous and threatening to the inherited power relations in the colonies (see Hastings 2003; Mungello 2015).

clergy, asserted Benedict XV. The vision of the transnationality of the Church is one of the main points of this papal letter: "The Catholic Church is not an intruder in any country; nor is she alien to any people. It is only right, then, that those who exercise her sacred ministry should come from every nation [...]" (ibid.: 14).

This idea is repeated in the part of the text dedicated to missionaries themselves. Reminding them that their primary task is that of saving souls, he refers to Psalm 44:11, from which he quotes: "Forget your people and your father's house" (Benedict XV 1919: 18). The duty of a missionary, he continues, is not to extend the human realm, but that of Christ, so that the citizens are acquired for the "heavenly fatherland, and not for an earthly one" (ibid.). The correct choice between these two fatherlands is an important marker of Benedict's missionary reform. If a missionary busied himself with obtaining prestige for his homeland, the local population would become suspicious of his real intentions, and justly so. Benedict XV seems to already envision the fall of the colonial world system, after which the only way for the Church not to collapse with it was to become transnational: "Such a situation could easily give rise to the conviction that the Christian religion is the national religion of some foreign people and that anyone converted to it is abandoning his loyalty to his own people and submitting to the pretensions and domination of a foreign power" (ibid.: 19). A missionary who does not follow these guidelines is not a missionary at all, he concludes, since "the true missionary is always aware that he is not working as an agent of his country, but as an ambassador of Christ" (ibid.: 20).

### **A Promise of Glory for a Small Nation**

Established half a decade after *Maximum illud*, the Yugoslav mission in Bengal begins in contradiction. The very reason it was established was that the Belgian Jesuits, very much in line with the papal apostolic letter but not only for that reason, decided to invite help from other nations. Bengal had been entrusted to the Belgian Jesuits by Pius IX in 1859 (Kokalj 1989: 20), but it turned out to be increasingly difficult to sustain active missionary outposts over the whole area, mostly due to the lack of missionaries and financial difficulties (ibid.). When the situation in the missions generally worsened in the wake of the First World War, many outposts were abolished, while the Belgian mission began focusing its attention on the more successful missionary regions, such as Chota Nagpur Plateau (ibid.: 22). In 1924, the head of the Yugoslav Jesuit province, Father Anton Prešeren, made an agreement with the Belgian Provincial, Father Willaert, for Yugoslav missionaries to take over missionary tasks in the deserted areas of the 24 Parganas district in the Ganges delta (Kolar 1998: 154–155). This allegedly transnational gesture, however, contained a very "national" promise, namely, the Yugoslav missionaries were led to believe that in time, this would become their own missionary territory, a promise that was never fulfilled (Targa 2013: ix). For that reason, even before the departure of the Yugoslav missionaries, the news that they had been promised their own mission in Bengal greatly resonated in their

homeland. In religious publications but also in other newspapers, it was interpreted as a great patriotic achievement for the new country, an understanding which stood in total opposition to the guidelines of the papal apostolic letter. Below I will analyse some of the potential causes for this explicit "disobedience", but first let us reconstruct the tones of this patriotic discourse.

Before the departure of the three missionaries from Slovenia in November 1929, the newspapers reported on their departure in pompous tones. In *Slovenski list* of 18 November 1929 we read of the farewell ceremony in Ljubljana, attended by two bishops and other high representatives of the Catholic Church. The crowds that wanted to attend the ceremony were supposedly so large, that – so the newspaper reports – police had to intervene to keep at least a thousand people out of the ceremonial hall. The long ceremony was also decidedly politicized, even to the point that the *ban's* wife led the performance of a children's choir. The main speaker, cathedral priest Tomaž Klinar, stressed not only the religious, but also the political importance of the missionaries' brave undertaking: "Together with the Catholic faith our missionaries also carry our name far from our homeland. [...] When it gets its own missionary right, we will be listed among the great nations. How important this farewell and this journey are for our beloved Yugoslavia!"<sup>5</sup>

We find similar praises in various publications of the time. Interestingly, a lot of them seem oblivious about the exact status of the mission the Yugoslav Jesuits were sent to, and are quick to claim that the mission already belongs to Yugoslav Jesuits, although that was not the case:

For us Yugoslavs, this is a historical event. For the first time in history we are sending our missionaries to the overseas missions on our own, and not under the name of the Germans, French or Italians, as has been the practice to date. This is the establishment of our own Yugoslav missionary province where pagan culture is at its peak, in Bengal.<sup>6</sup>

As we can see, this "inaccuracy" did not only appear in the daily newspapers, where it could perhaps be attributed to the writers not being completely familiar with the details. The same rhetoric was used by missionaries themselves, most explicitly in the first issue of *Bengal Missionary*, in an article titled "Our Bengal mission":

Divine providence granted our Slovenian and Croatian missionaries of the Jesuit Society their first independent missionary region [...] This is now the first independent Yugoslav missionary land. It is ours and no other nation will take care of it anymore. It was entrusted to our missionaries [...]<sup>7</sup>

5 »Slovo naših misijonarjev«, *Slovenski list*, 18 November 1929: 3.

6 »Jugoslovanski misijon v Indiji«, *Slovenec*, 27 October 1929: 8.

7 »Naš bengalski misijon«, *Bengalski misijonar – Glasnik srca Jezusovega* 1, 1933: 1, 2.

The exaggerations do not stop here. For many different reasons, the details about the actual size of the missionary region allegedly “handed over” to Yugoslav missionaries were obfuscated. Most often the reader was led to believe that Yugoslav missionaries were entrusted with the entire Bengal region, and not only the 24 Parganas district. Supporting this misrepresentation, we find maps that mark a region much larger than the actual domain of the missionaries.



Figure 2: Map of India showing the “Yugoslav mission”. The text explains that the black colour indicates the region of Slovenian and Croatian missionaries (source: »Slovensko misijonstvo«, *Slovenec*, 31 August 1930: 12).

While the ethnic and cultural unity of the nations in the newly established Yugoslavia (at the time still under the name “The Kingdom of Serbs, Croats and Slovenes”) seemed hard to achieve, the group of Slovenian and Croatian missionaries were establishing, according to the press reports, “a religious and cultural outpost of Yugoslavianness in India”.<sup>8</sup> The difficulties and insecurities in forming the new

8 »Verska in kulturna postojanka Jugoslovanstva v Indiji«, *Slovenec*, 18 December 1927: 6.

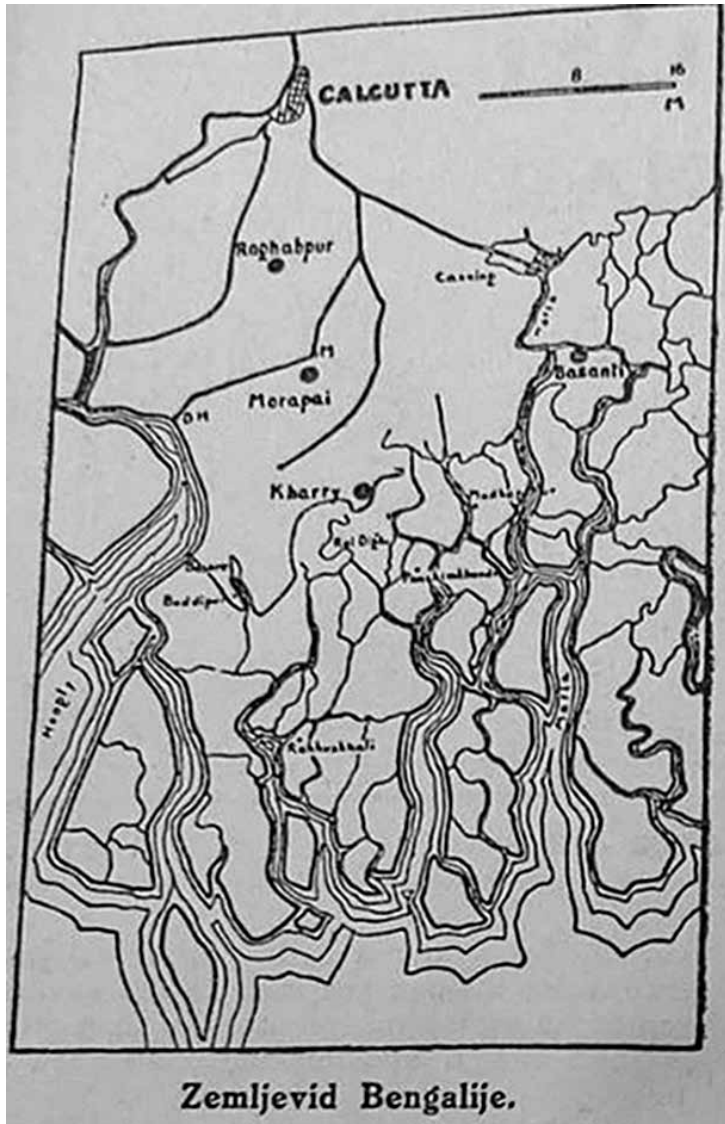


Figure 3: A much more realistic map of the 24 Parganas district where the Yugoslav missionaries were working (source: »Naš bengalski misijon«, *Bengalski misijonar – Glasnik srca Jezusovega* 1, 1933: 1, 2) – however, it still says “Map of Bengal”.

Yugoslav identity, however, were nevertheless evident in almost all of the articles published. The authors interchangeably labelled the missionaries and their mission as “Yugoslav”, “Slovenian”, or simply “Our”, a confusion which is still present in later texts on the topic (see Kolar 1998: 154–155). Such a transposition also takes place in an interesting article on the “Yugoslav missionary outpost in India”, where, despite the title, the text actually focuses on the dispositions of the Slovenian nation:

They say that we Slovenes are few. But we live across the globe. Not as masters of large and rich colonies, but nevertheless as colonizers or conquistadors, "conquerors". [...] It is an honour for any nation if it has and provides for many missionaries [...]. Is not this then all the truer for us Slovenes, who are not a wealthy and big nation, but who in this difficult time are able to show the progress and successes of the missionaries abroad?<sup>9</sup>

The unitarian aspirations of King Alexander and the Belgrade government also divided Slovenian politics (see Perovšek: 2014). The liberals-centralists supported the forming of a new larger national identity in Yugoslavia, which they understood as a natural continuation of the development of the Southern Slavic ethnicities. At the same time, they claimed that the strength of this (larger) nation provided a possibility for national freedom (ibid.: 235–237). The proponents of the opposing position, the autonomists-federalists, were against the Yugoslav nation-building process and demanded more autonomy for the ethnic groups in Yugoslavia. The conservatives, especially the Slovenian People's Party of Anton Korošec, were strongly on the side of the latter group (ibid.: 237–239), although their positions changed considerably due to the daily political fluctuations. It is therefore quite contradictory that the missionaries, themselves proponents of the Catholic Church,<sup>10</sup> would strive to represent themselves as working for the benefits of Yugoslavia and its national prestige, thereby going against both the official position of the Church and their political allies back home. As we will see in the following section, this unusual choice and the way it was shifting can only be understood against the backdrop of internal political developments in Yugoslavia and the changing relationship between the state and the Catholic Church.

### **Negotiating the Relationship Between the Catholic Church, the State and the National Politics**

In order to understand how these unlikely alliances were formed, one has to go beyond the scope of the religious matters to the relation between the Church and the state in Yugoslavia. The numerous lapses and inconsistencies in the scope and meaning of "our" mission and "our" missionaries are an example of how these two levels substantially overlapped. As mentioned before, the new political formation, established after the First World War out of former parts of Austro-Hungarian Empire and the Kingdom of Serbia, struggled with the relation between the Yugoslav national identity and the national identity of the respective nations that comprised Yugoslavia. Apart from the three constitutive nations, Serbs (including Montenegrins) at 38.83%, Croats at 23.77% and Slovenes at 8.53% of the population, there were several other

9 »Jugoslovenska misijonska postaja v Indiji«, *Slovenec*, 4 December 1932: 4.

10 Furthermore, one of the key figures of the missionary project between the two World Wars was Lambert Ehrlich, a well-known protagonist of an ultra-conservative faction called "the Catholic Right".

nations (Bosnian Muslims, Macedonians etc.) which also played an important political role (Banac 1988: 58; see also Mithans 2017: 72). In addition, the new country now had to address the issues of religious plurality. The religious distinctions largely overlapped with ethnic distribution, especially between the two largest ethnic groups.

For Croats and Serbs, language differences could not be the determining criterion, given that their language had been commonly thought of as "Serbo-Croatian" since the end of the 19<sup>th</sup> century. In the absence of linguistic difference, religion assumed the main role of the criterion of national identity, which tainted the structural characteristics of nations and nationalisms in Yugoslavia, especially in the interwar period (Mithans 2017: 28–30). The numbers of Catholics and Orthodox Christians were comparable; in 1921 46.6% were Orthodox and 39.4% were Catholic, while the Muslim population was 11.1% (ibid.: 72). In this context it is clear how religious identity could be used for political identification, but the forms of these politicizations still vary between the different national and political contexts. As Ratej claims in her paper on the politicization of the Catholic and the Orthodox Churches between two World Wars, the main controversy was the Serbian-Croatian conflict, which in turn politicized the antagonism between the Catholic and the Orthodox Church (Ratej 2008: 37). The alleged anti-Yugoslav position of the Catholic Church was a reflection of this politicization.

From the beginning, one of the problems of the relationship between the Catholic Church in Yugoslavia and the Yugoslav state was the absence of a singular legal standard determining this relationship. In 1918, many different agreements regulating the relationship between the Catholic Church and parts of the country were in place simultaneously: the Serbian concordat of 1914, the Convention with Montenegro of 1886, the Convention for Bosnia and Herzegovina of 1881, and several Austrian and Hungarian laws in those parts that belonged to the Austro-Hungarian Empire (Mithans 2017: 81–82). Already in 1918, at the Episcopal conference of the Catholic Church in Yugoslavia, it was proposed that this issue be uniformly resolved in a concordat between the Vatican and the new kingdom. For the Vatican, especially between the two World Wars, concordats were the preferred method of solving the issues of the status of Catholic Church in individual countries (ibid.). In 1922 the Yugoslav government agreed to this option and the negotiations commenced.

The history of the negotiations on the Yugoslav concordat is extremely complex, and the reasons why each of the sides was interested at all in making this agreement are equally diverse. On the side of the Church, the interest in securing a stable position in this unpredictable multinational union, where the competing Serbian Orthodox Church had a strong influence, played a major role as a potential guarantee for the future. To obtain this, the Church was ready to accept some radical compromises, for example, allowing the Old Slavic and Glagolitic scripts to be used in Catholic liturgy (ibid.: 106). The state's agenda was also complex. Securing a stable agreement with the Vatican would firstly enable them to bypass repeated negotiations with Catholic bishops in Croatia and Slovenia. Secondly, this agreement would

acknowledge the position of the two constitutive Catholic nations in Yugoslavia and hopefully silence their dissent on a national basis. As Charles Loiseau, the advisor to Yugoslav King Alexander, reportedly claimed (*ibid.*: 90), a concordat would separate the Catholic sentiment from the Croatian sentiment and prevent the nationalisms growing stronger with the help of religious affiliations. This de-nationalization of the Church, however, at the same time also meant a “nationalization” of the Church, by which of course we now mean Yugoslavization. With the permission to use Old Slavic and Glagolitic script and with plans to establish a unified “Yugoslav Catholic Church” (*ibid.*), the state would gain increased control over one of its biggest potential opponents.

Despite the long negotiations and the final failure of the concordat,<sup>11</sup> the complex developments related to it can help us understand the mixed allegiances expressed by the Slovenian missionaries of the Bengal mission and the newspaper representations of them. The attempt to “Yugoslavize” the Catholic Church and the different levels of opposition to this process explain the evident desire to portray the new Bengal mission in the light of this ideological twist. Furthermore, the years when this “missionary patriotism” was most explicitly expressed in publications also overlap with the restart of negotiations in the wake of King Alexander’s dictatorship, and lasted approximately until the first year after his death in 1934, when critics of the agreement started delaying its acceptance by the parliament. Another interesting factor has to be taken into account, this one on the level of Slovenian politics within Yugoslavia. The main conservative political party, the Slovenian People’s Party, which was closely connected with the Church, spent the period between the forming of the Kingdom of Serbs, Croats and Slovenes and the dissolution of the Kingdom of Yugoslavia shifting political alliances. Being initially strong supporters of the forming of the Yugoslav kingdom in 1918, they effectively went from defending the autonomy and sovereignty of the Slovenian nation in the Austro-Hungarian context to becoming supporters of the new increasingly unified state. After failing to win in the 1920 elections and becoming an opposition party, they once again shifted to a more federalist/autonomist position, only to go back to a centralist position after re-joining the government in 1927. The crisis after the parliamentary shooting in 1928 and the subsequent dictatorship of King Alexander Karadjordjević put the

---

11 The negotiations were neither smooth nor fast. After the initial start in 1925, some disagreements led to a standstill which lasted for four years. In 1928, one of the biggest opponents of the concordat, the Croatian nationalist Stjepan Radić, was assassinated in the parliament, an incident which led to the dissolution of the parliament and the self-proclaimed dictatorship of King Alexander. In this increasingly unitarian political climate in the now renamed and reorganized Kingdom of Yugoslavia, the negotiations picked up in 1931 and then continued in secret from 1933 to 1935 through king’s special envoy, Nikola Moscatello. Although the successfully negotiated concordat was then signed in June 1935, its critics caused delays before it was brought to parliamentary vote. Even that was not enough for the agreement to be finally accepted and – after waiting for almost another year – Prime Minister Stojadinović finally announced his decision in February 1938 that the concordat would not be brought before the senate for a final vote (see Mithans 2017: 118–166, 219–271; Ratej 2008).



Slovenian People's Party along with many other political parties in Yugoslavia under a strict ban and brought its leaders into confinement. In order to recover its position after the King was assassinated and the ban was partly lifted, the SPP joined with two conservative parties of Bosnia and Serbia to form the Yugoslav Radical Union, while this new party was then constantly negotiating between the explicit unitarianism of their structure and the implicit particularism of the constituent three national parties. These shifts must have at least partially informed the Church's and the media's positions on the missionaries' patriotic duties, and can help explain the seemingly confusing shifts in terminological choices between "Slovenian" and "Yugoslav" as synonyms for "our(s)" in the texts on the missionary project in Bengal.

### National Men and Transnational Women

There was, however, another internal distinction within the missions themselves. In the expressions of missionary nationalism in publications and newspapers, the protagonists were mostly "our" male missionaries, mostly Jesuits (with a few representative Salesians thrown in). Only very sporadically do we find references to women missionaries and their role in the Bengal mission in particular. The task of representing their nation was universally ascribed to male missionaries and virtually never to women. Needless to say, none of the missionary women religious received a farewell ceremony of the type that was organized for Poderžaj, Drobnič and Udovč, although two of them, Magdalena Kajnč and Theresa Bojaxhiu (later known as Mother Theresa) had departed for India a year earlier than the three Jesuits.<sup>12</sup> With the exception of texts by Mirjam Zalaznik, a PhD educated Loreto sister, and a few occasional letters from other women missionaries, they also did not have a voice in the otherwise abundant missionary press of the time.

This misrepresentation does not do justice to the role which women missionaries played in the missions. The tasks for the missionaries in Bengal were manifold. Apart from doing missionary work and caring for the souls of the local population, they also provided medical assistance, tended to the poor, tried to introduce agricultural and technological innovations and even organized social help such as rice foundations to help the impoverished population of the 24 Parganas district to get over the worst years (see *Bengalski misijonar*). These tasks were divided among men and women missionaries fairly equally, and the small groups of men and women religious also shared the missionary outposts without an obvious hierarchy between them. In the absence of personal accounts, it is of course difficult to speculate on what equalities or inequalities were present among men and women religious in Bengal mission of the time, but it can be assessed that their responsibilities – if not their status – seem in many ways comparable.

---

12 There was only a short note on their departure in »Nova slovenska misijonarka«, *Katoliški misijoni*, 1928/29: 3).

We could of course speculate in large theoretical frameworks about how the patriotism in missionary contexts simply adopted the patrilineality of the society in general, where the sons represent the family, and the daughters belong to the family of their husbands, in this case the Church. A tone like this can for example be discerned in a text by Antun Vizjak, a Croatian Jesuit missionary in Bengal. He tells a story about two women missionaries suffering an attack by savage bandits, and comments: "The women missionaries in pagan lands sacrificed their beloved father's home, they sacrificed their homeland with all its joys, and finally they even sacrifice their life – all for Jesus, for the salvation of the souls".<sup>13</sup>

On the other hand, the transnationality that is here ascribed to women is precisely the standard that – according to Pope Benedict XV – *all* missionaries were supposed to follow, regardless of their gender. But it must be noted that the transnationality for women missionaries was not necessarily one of choice, and should not automatically be ascribed to their more "awakened" missionary sense. Various factors were in play. If we simply analyse the list of Slovenian missionaries that served in India in the 20<sup>th</sup> century, we can immediately see a drastic difference. Among all of 13 Slovenian men missionaries in India before the Second World War, only three served outside of Bengal (see Kokalj 1989: 287–302). For women, on the other hand, the ratio was different – only half were part of the Bengal mission and others were doing missionary work in other parts of India, ranging from the south to the northeast. That alone, together with the stress that was placed on the patriotic importance of the Bengal mission, could explain why women missionaries were less entangled in the nationalist discourse.

Even more importantly, if we compare the men and women missionaries in Bengal itself, we notice another dissimilarity. Although their paths eventually met in the missionary outposts of Basanti, Morapai and other places, how they got there differed greatly. With two exceptions (i.e. the Salesians), all of the missionaries of the Bengal mission were Jesuits, and the career path they had to take to end up in India was fairly predictable. The main steps in their trajectory were either the St. Andraž Jesuit community in Austrian Carinthia, the Jesuit seminary in Pullach near Munich and/or the Jesuit College in Travnik in Bosnia (ibid.). Throughout all these stages they remained in close connection with institutions back home and with their compatriots on the way. Women missionaries, on the other hand, belonged to a number of different religious congregations: the Daughters of the Holy Cross, the Medical Mission Sisters, the Loreto Sisters, FMA Daughters of Mary Help of Christians, the Carmelites and the Franciscan Missionaries of Mary (ibid.). Accordingly, the stations on their path to the Bengal mission were individual, going through places as diverse as Belgium, England, Ireland, Italy, Spain, and Germany (ibid.). When they finally came to India, they belonged to communities within which they were often

---

13 Vizjak, Antun, »Skozi džunglo«, *Ave Maria* XXIX, 1932: 307.

the only "representatives" of Yugoslav nationality. Transnationality in their case was a condition of their religious life and not necessarily an option they would choose.

## The Case of the Yugoslav Bengal Mission

Before long, the patriotic zeal of the Bengal mission was numbed by the harsh realities of the 1930s, and the optimistic patriotism of the early years turned into a patriotism of need. Most of the time, *Bengal Missionary* reported on the hardships, famine<sup>14</sup> and natural disasters that struck the 24 Parganas district, putting noticeably more effort into convincing their compatriots in Slovenia to help with donations. At the same time, Europe was suffering its own problems. Nazism and fascism were growing stronger, and in Yugoslavia the nationalist-religious oppositions managed to completely stop the process of creating the Yugoslav concordat. Along with the gradual failure of the nation-building process of a potentially unified Yugoslav nation, the patriotic optimism of the early years of the Bengal mission soon became a thing of the past. The emphasis was now rather placed on the "Slovenian" and "Croatian" identity of the Bengal missionaries, and the links between the missionaries and their homeland were not so much of national pride, but became lifelines which kept their missions and sometimes even the missionaries themselves from dying.

The beginning of the Second World War also brought the end to the publication of *Bengal Missionary*, which had played a major role in representing missionary work in India to Slovenian readers for almost a decade. In one of the last issues, in January 1940, the supplement published a letter by Ferdinand Perier, the Archbishop of Calcutta.<sup>15</sup> The letter sums up well what the idealistic missionary patriotism of the late 1920s transformed into under the economic and political pressures of the 1930s. The title of the article presenting his letter is "A great expression of gratitude to our nation" (*ibid.*). Although the reference to "our nation" is again unclear, it can be discerned from Perier's text. The letter of gratitude, it turns out, is in fact a request and a plea to "Slovenian and Croatian Catholics" to donate to the building of the Church of St. Theresa in Basanti. Furthermore, the archbishop expressed his hopes that the faithful donors do not take the donations for the church *away* from the sum they would otherwise give for the missionary outposts, effectively asking them to give an additional sum. With a hint of what almost sounds like historical irony, he adds: "since it is much more important and urgent to build temples of God in the souls" (*ibid.*).

Within a decade and a half of the existence of the "Yugoslav" Bengal mission, it became a laboratory for a specific historical intertwinement of the heterogeneous

14 According to Paul Saumik's report "1930–1943: Agrarian Transformation and the Famine in Bengal", the 1930s present a structural paradigm that later led to the catastrophic 1943 Bengali Famine (<https://hermes-ir.lib.hit-u.ac.jp/rs/bitstream/10086/28239/1/wp2016-11.pdf>). We can only speculate from the missionary reports that the impoverished and inhospitable areas in the Ganges delta were the first to experience the adverse effects of these structural changes.

15 »Visoka zahvala našemu narodu«, *Bengalski misijonar – Glasnik srca Jezusovega* 8, 1940: 1.

motivations of the religious missionary zeal and the political aspirations of a newly formed nation. In addition, the representations of this mission also reflected the many shifting national and political identities and allegiances within Yugoslavia. This particular context, which I have analysed in the present paper, made the case of the Yugoslav Bengal mission and its women and men missionaries unique. A comparison with similar cases of smaller or multi-ethnic national missions might show whether the same trends could be discerned in other missions in India and elsewhere. At the same time, this particular missionary case was part of the larger shifts of the time, the negotiating positions on the role of the Church in the European nationalisms of the time, and the bigger picture of a decolonizing world and, consequently, localized Church structures and a transnational Church.

## REFERENCES

- Amon, Smilja (1996). *Tisk in politika v Jugoslaviji (1918–1941)*. Ljubljana: FDV.
- Banac, Ivo (1988). *The National Question in Yugoslavia: Origins, History, Politics*. Ithaca, London: Cornell University Press.
- Benedict XV (1919). *Maximum illud*. <http://www.svdcuria.org/public/mission/docs/encycl/mi-en.htm> (10. 2. 2019).
- Chaudhuri, Nupur, Strobel, Margaret (1992). *Western Women and Imperialism: Complicity and Resistance*. Bloomington and Indianapolis: Indiana University Press, 1992.
- Hastings, Adrian (2003). The Clash of Nationalism and Universalism within Twentieth-Century Missionary Christianity. *Missions, Nationalism and the End of Empire* (ed. Brian Stanley). Grand Rapids, Michigan/Cambridge; UK: William B. Eerdmans Publishing Company, 15–33.
- Hastings, Adrian (1996). *The Construction of Nationhood: Ethnicity, Religion and Nationalism*. Cambridge: Cambridge University Press.
- Kokalj, Jože (1989). *Pogovori ob Gangesu*. Ljubljana: Župnijski urad Dravlje.
- Kolar, Bogdan (1998). *Na misijonskih brazdah cerkve*. Celje: Mohorjeva družba.
- Lehmann, Hartmut (2003). Missionaries without Empire: German Protestant Missionary Efforts in the Interwar Period (1919–1939). *Missions, Nationalism and the End of Empire* (ed. Brian Stanley). Grand Rapids, Michigan/Cambridge; UK: William B. Eerdmans Publishing Company, 34–53.
- Mithans, Gašper (2017). *Jugoslovanski konkordat: Pacem in discordia ali jugoslovanski »kulturkampf«*. Ljubljana: Inštitut za novejšo zgodovino.
- Mungello, D. E. (2015). *The Catholic Invasion of China: Remaking Chinese Christianity*. Lanham, Boulder, New York, London: Rowman & Littlefield.
- Perovšek, Jurij (2014). Vprašanje domoljubja na Slovenskem v času Kraljevine Srbov, Hrvatov in Slovencev/Jugoslavije 1918–1941. *Prispevki za novejšo zgodovino* 1, 231–243.

- Pirjevec, Jože (1995). *Jugoslavija: [1918–1992]: Nastanek, razvoj ter razpad Karadjordjevičeve in Titove Jugoslavije*. Koper: Lipa.
- Pollard, John (2014). *The Papacy in the Age of Totalitarianism, 1914–1958*. Oxford: OUP.
- Ratej, Mateja (2008). Odtenki politizacije Rimskokatoliške in Srbske pravoslavne cerkve pri Slovenski ljudski in Narodni radikalni stranki med svetovnjima vojnama. *Prispevki za novejšo zgodovino* XLVIII/2, 35–52.
- Reeves Ellington, Barbara, Sklar, Kathryn Kish, Shemo, Connie A. (2009). *Competing Kingdoms: Women, Mission, Nation, and the American Protestant Empire, 1812–1960*. Durham, London: Duke University Press.
- Status of Global Mission*, <http://christianityinview.com/downloads/StatusOfGlobalMission.pdf> (5. 2. 2019).
- Targa, Sergio (2013). *Satkhira: The Diaries of the Jesuit Fathers (1918–1947)*. Osaka: Asian Study Centre.
- Wildenthal, Lora (2001). *German Women for Empire, 1884–1945*. Durham, London: Duke University Press, 2001.

## NEWSPAPERS SOURCES

*Ave Maria*, 1932

*Bengalski misijon – Glasnik srca Jezusovega*, 1933, 1940

*Katoliški misijoni*, 1928/29

*Slovenec*, 1927, 1929, 1930, 1932

*Slovenski list*, 1929

## POVZETEK

### »NAŠ BENGALSKI MISIJON«: USKLAJEVANJE NACIONALNIH IN TRANSNACIONALNIH NAČRTOV PRI JUGOSLOVANSKIH MISIJONARJIH IN MISIJONARKAH V BENGALIJU MED OBEMA VOJNAMA

Helena MOTOH

V nasprotju z apostolskim pismom *Maximum illud*, ki je od misijonarjev zahtevalo, da pretrgajo vezi z nacional(istič)nimi in s kolonialnimi interesi, je bil misijonarski podvig medvojnih jugoslovanskih misijonark in misijonarjev v Bengaliji globoko prežet s patriotizmom, tako časopisje kot misijonarski tiski pa so jugoslovanski bengalski misijon prikazovali kot simbolno zmago nove jugoslovanske države. Članek to protislovje interpretira z raziskavo načinov, na katere so usklajevali konflikt med transnacionalnim misijonarskim projektom in nacionalističnimi programi, pri čemer so bili pogosto pred težavno odločitvijo, interesom katere nacije naj pravzaprav sledijo.

Prvi del članka je posvečen transnacionalističnemu obratu, ki ga je v doktrino in prakso misijonarstva po svetu zarisalo apostolsko pismo papeža Benedikta XV., *Maximum illud*. V drugem delu sledi analiza prav nasprotnega pojava, odkrito patriotskih in nacionalističnih načrtov medvojnega jugoslovanskega katoliškega misijona v Bengaliji. V tretjem delu se članek posveča kontekstu te specifične domoljubne usmeritve in vzroke zanjo išče v spreminjajočem se odnosu med (jugoslovansko) državo in Katoliško cerkvijo. Na koncu članek vzpostavi še ločnico med misijonarji in misijonarkami glede na patriotsko breme, ki so ga morali nositi, in glede na to, kako so to nalogo sprejeli. Ta ločnica pokaže, da je jugoslovanskim misijonarkam poseben strukturni položaj, v katerem so se znašle, omogočal, da so udeležene bolj transnacionalne zaveze kot njihovi moški kolegi, od katerih se je pričakovala strogo začrtana domoljubna vloga.

# FEMALE RENOUNCERS IN INDIA: A NEGLECTED CHAPTER IN THE HISTORY OF INDIAN RELIGIONS

Tamara DITRICH<sup>1</sup>

COBISS 1.01

## ABSTRACT

### **Female Renouncers in India: A Neglected Chapter in the History of Indian Religions**

This paper is a panoramic survey of a millennia-long tradition of asceticism and monasticism in the Indian subcontinent. The main ascetic traditions of India are overviewed, with a particular focus given to female renouncers. Their doctrinal premises and religious practices are discussed within a historical framework, and major emerging themes are identified. Since this paper forms part of a research project investigating the lives of Catholic female missionaries in India in the twentieth century, it concludes with the identification of significant overlaps between female renunciation in the Indic and Christian traditions, and engages in some reflections on the encounter between the two discourses.

KEY WORDS: Indian asceticism, female renouncers in India, nuns in Indian religions

## IZVLEČEK

### **Odpoved indijskih žensk posvetnemu življenju: Pozabljeno poglavje v zgodovini indijskih religij**

Prispevek najprej predstavi večtisočletno tradicijo indijskega asketizma in monasticizma ter oriše njihove glavne verske predpostavke in prakse. Pri tem se osredotoči na položaj žensk v starih asketskih tradicijah Indije, predvsem v budizmu, hinduizmu in džainizmu, kar predstavlja področje, ki je bilo doslej deležno malo pozornosti sodobnih raziskovalcev. Ker je prispevek del večjega raziskovalnega projekta o delovanju katoliških misijonark v kolonialni Indiji, na koncu identificira pomembna stičišča med indijskimi asketinjami in katoliškimi nunami in razmišlja o srečanju katoliškega in indijskega verskega diskurza.

KLJUČNE BESEDE: indijski asketizem, indijske asketinje, nune v indijskih religijah

---

<sup>1</sup> PhD in Linguistics, Associate Professor, Indian and Buddhist Studies, University of Ljubljana, Nan Tien Institute, and University of Sydney; t.ditrich@gmail.com

## RENUNCIATION OF WORLDLY LIFE IN ANCIENT INDIA

This paper, which forms part of a larger research project investigating female Catholic missionaries in twentieth-century India, is an attempt to provide a religious context through a panoramic historical overview of female renouncers in India. This backdrop will serve as an indication of the complex religious canvas against which the encounters between various renouncer traditions can be investigated.

For millennia, renunciation has been at the core of most ancient Indic religious traditions. Here, the umbrella term “renouncer tradition” refers to a wide spectrum of different, yet interrelated traditions of doctrines, practices, and social institutions involving asceticism and renunciation, which freely borrow from and influence each other on account of their very fluid boundaries. Although the first records of asceticism<sup>1</sup> can be found in early Vedic literature, a burgeoning of the renouncer tradition seems to have emerged in the middle of the first millennium BCE. This was a period of great social and political change in India, which occurred with the expansion of urbanisation, the growing power of kingship, the development of new trade routes, and increased communication, all of which allowed for a broader exchange and expansion of new ideas and movements (Gombrich 1988: 50–60). These developments may have contributed to an increased sense of individualism (Olivelle 2011: 13) that offered people new choices, including the pursuit of the life of a homeless renouncer. Ancient texts inform about a wide range of different ascetics and wandering mendicants in India at that time, living individually or in small groups, and apparently without a central body or pronounced hierarchical structure.<sup>2</sup>

Despite a diversity of doctrinal foundations and practices among the various groups of ancient Indian renouncers, a frame of reference may be drawn by identifying a few common denominators, perhaps above all, the fundamental premise that human life (as well as the life of animals and other beings) does not end with death but continues into a new life; thus, there is no beginning and no end to birth, death, and subsequent rebirth (*saṃsāra*). Being caught in the endless cycle of life and death, conditioned by the law of cause and effect (*karma*), was viewed as unsatisfactory, subject to suffering, and therefore highly undesirable. Hence, most Indian spiritual traditions engaged with the question of how to be released from

---

1 The term “asceticism” signifies various practices of restraint and abstinence, performed mainly by renouncers and, to a lesser degree, by householders, in the pursuit of spiritual goals, whereas “renunciation” refers to the abandoning of worldly life, which would involve a form of initiation and include asceticism.

2 For example, in the *Brahmajālasutta* (Walshe 2012: 67–90), sixty-two types of worldviews are listed, demonstrating a vast spectrum of philosophies and ascetic practices in ancient India at the time.



the entanglements of *samsāra* and achieve liberation,<sup>3</sup> which was considered to be attainable through detachment and spiritual knowledge.<sup>4</sup>

The renouncer's path to liberation required radical lifestyle changes, i.e., becoming homeless, wandering without permanent residency, or dwelling either alone or in small groups in forests and other secluded places. Typically, renouncers would train in ascetic practices, including celibacy, fasting, and various other austerities in order to cultivate detachment in relation to the body and mind. In other words, by abandoning social status, name, family life (by following the vow of celibacy), and even food production (by begging for food or subsisting in the wilderness), the renouncers apparently aspired to deconstruct the socially conditioned identities that are created by actively participating in domestic and communal life. Nonetheless, as will be discussed, the institutions that developed within the renouncer traditions would still participate, to varying degrees, in social life and thus reflect the structural patterns of the society of the time, particularly in relation to the social hierarchy and the construct of gender.

The renouncer's lifestyle was considered to be a negation of everything that society represented, but it was through this very rejection of social structures that they received the recognition, deep respect, and support of society. They were attributed special knowledge or magical powers, and through their support of renouncers, people believed that they would obtain karmic merit, which could also be transferred to their family and ancestors. The renouncers displayed easily visible and specific signs or marks (*liṅga*) such as a shaven head (e.g., Buddhist monks) or matted hair (e.g., Brahmanical anchorites), and they lived naked (e.g., Digambara Jain ascetics) or dressed in distinct clothing. Through these means alone, they received recognition of their ascetic status along with the support from the public, often, it would seem, irrespective of their specific doctrinal beliefs.

The main sources of information about early Indian asceticism and monasticism are found within three major ancient Indian traditions, namely Brahmanism (often situated under the broader umbrella term of "Hinduism"),<sup>5</sup> Jainism, and Buddhism. References to ascetics already occur in the earliest recorded texts, the Vedas and Brāhmaṇas, but the most expansive evidence is found in two large bodies of texts, i.e., the Upaniṣads and the Dharmasāstra literature, which describe anchorites who dwell in forest hermitages and practice various restraints in pursuit of spiritual liberation

3 Within the different traditions, spiritual liberation was known by different terms such as *mokṣa*, *mukti*, *nirvāṇa*, and *kaivalya*, thus manifesting the heterogeneity of the Indian renouncer tradition.

4 For studies on the ancient Indian renouncer tradition, see Bronkhorst 1993; Olivelle 2011.

5 The term "Hinduism" loosely represents the wide range of schools of thought, beliefs, and religious practices of India, other than Muslim, Christian, Jain, and Sikh. It emerged as a category only in the nineteenth century CE, mainly as the outcome of Western colonisation and the dominant social role of Brahmanism, and was appropriated by Indians during the anti-colonial movement, while being strongly linked to the formation of an Indian national identity (King 1999: 96–142).

(Olivelle 2011: 91–125). With time, the records of renouncers within the Brahmanical tradition expanded, particularly in the collections of legal texts, known as the *Dharmaśāstras*, composed around the first few centuries CE, and in a group of about twenty *Upaniṣads*, called the *Śaṃnyāsa Upaniṣads*, situated (tentatively) between the beginning of CE and the twelfth century CE (Olivelle 1992: 8–11).

The developments within Brahmanism were significantly influenced by two ascetic movements that had been spreading across the Indian subcontinent from the middle of the first millennium BCE onwards, namely Buddhism and Jainism. Both traditions shared the quest for liberation from *saṃsāra* to be attained through a life of renunciation. For Buddhist renouncers, this involved the cultivation of virtues, detachment, celibacy, and meditation, whereas the path of Jains was more ascetic, incorporating severe austerities, extreme non-violence, and prolonged fasting periods. Both traditions established monastic orders for men and women and allowed people from all walks of life to ordain on a voluntary basis. Buddhism flourished in the Indian subcontinent until (about) the end of the first millennium CE, by which time its many schools had influenced other religious traditions throughout India and Asia, whereas Jainism has remained within the Indian subcontinent until the present day. It is well evidenced that with the expansion of Jainism and Buddhism, monasticism became well established in India and, consequently, influenced most Indian religious movements, which involved an extraordinary variety of renouncer groups and institutions. Thus, the renouncer tradition has flourished throughout recorded Indian history, encompassing continuous changes, innovations, and developments, and perhaps generating the most important nourishing ground for the multifarious spiritual and cultural heritage of the Indian subcontinent down to the present day.

## FEMALE RENOUNCERS THROUGHOUT INDIAN HISTORY

The freedom of choice to follow the path of renunciation was granted not only to men but also to women, although their position was always presented as marginal and inferior to men's, at least according to the traditional records, which allot very meagre attention to female ascetics. The prevalent disregard of women in the textual traditions of India reflects the fact, as noted by many scholars (e.g., Gross 1993: 20; Black 2007: 133), that historical records on Indian religions were almost exclusively composed, transmitted, and recorded by men, targeted at a male audience, and thus speaking mostly about men. Therefore, textual sources on female renouncers should be approached with great caution, bearing in mind that they tend to construct an ideal of femininity that is related to – but does not represent – the actual social realities and gender relations of the time. In other words, the literary records of ancient India are certainly not simple historical accounts but, to a large extent, complex reflections on and transmissions of (male) societal expectations, utopias, fears, and projections, which resonate the predominantly androcentric and patriarchal

views of the time. As a result, they may be of very little relevance to the everyday life of female renouncers. Women's voices occur very rarely and, when they do speak, they are not heard; they are included in the texts by male editors and "their speech is mediated by male speakers" (Black 2007: 158).

Female renunciation is not only a neglected chapter in the textual records of Indian religions but also in modern scholarship. Numerous studies, especially from the first half of the twentieth century or earlier, as well as many contemporary textbooks on Indic religions dedicate very limited attention to women (and even less so to female renouncers), often mentioning them in a few sentences or paragraphs as a single homogenous category. Only in the last few decades has research on female ascetics and monastics started to emerge based on the study of ancient texts (e.g., Sponberg 1992: 3–36; Black 2007: 133–168; Collett 2016), often explored through a feminist lens (e.g., Gross 1993) or, more frequently, drawing from research on modern female renouncers (e.g., Denton 2004; Salgado 2013; Sethi 2012); these studies show a significant discrepancy between traditional textual sources and modern ethnographical data. Having underlined the great paucity of resources and research on female renouncers – especially in comparison to the attention given to their male counterparts – it should nevertheless be highlighted that there is sufficient evidence to indicate a continuity of female renouncer traditions on the Indian subcontinent from ancient times to the present day.

## Representations of Women in Brahmanical Sources

The early Upaniṣads, situated in the first half of the first millennium BCE, inform about the engagement of women in spiritual pursuits; though largely marginalised, they are occasionally allowed to speak. For example, Gārgī, the oft-mentioned female character from the Bṛhadāraṇyaka Upaniṣad, demonstrates her superior knowledge and understanding of the teachings on spiritual liberation when she challenges the sage Yājñavalkya (Olivelle 1998: 89–93), and yet, at the end of the debate, she remains silent, although her "defeat" may be questioned. Apart from such exceptions, female voices in the Brahmanical literature are few and far between and "are continually restricted and muted" (Black 2007: 135).

The Dharmaśāstra, another important body of ancient Brahmanical texts, attributes only one role to women, namely that of a married woman whose religious life and duties (*strīdharmā*) are centred on serving and obeying her husband and bearing him sons. Thus, one of the most renowned legal texts of ancient India, the Law Code of Manu (MS), probably composed between the second century BCE and the second century CE, consistently presents women as inferior to men – physically, mentally, morally, and spiritually – and prescribes that they should always, in all circumstances, be subordinate to and controlled by men (MS 5: 147–148; Ditrich 2010: 145). This text speaks of women only in relation to men and reiterates their wifely

subordination with such strong emphasis that a very apparent subtext emerges, pointing to a great fear of female power, expressed especially in her sexuality and motherhood (Ditrich 2010: 156–157). Although the Brahmanical tradition incorporated renunciation (*saṃnyāsa*) as a possible life choice, it was available solely to men, whereas the only model proposed in the texts for women was to be a perfect wife.<sup>6</sup> This role was envisaged as a kind of domestic asceticism, which encompassed chastity, self-sacrifice, total submission to and worship of her husband, regular fasting, and other restrictions and vows (*vrata*) in order to generate merit for her husband and family (Clémentin Ojha 2012). Furthermore, if widowed, the woman was expected to live a celibate life and practice austerities, considered to be the only appropriate path for her to join her husband after death.

To stress once again, the Brahmanical construct of women's position in society, which strips them almost completely of any agency, must be questioned in terms of how relevant these master narratives actually were to the everyday life of women, if at all. A careful reading of the legal texts themselves implies that women at the time possessed some economic power and agency (Olivelle 2004); in addition, ancient Indian literature provides many examples of female ascetics or renouncers, from the great epics to the dramas by Kālidāsa (e.g., Kauśikī in Śakuntalā). Moreover, at the time of the composition of legal texts, there were many non-Brahmanical female ascetics in India such as Buddhist and Jain nuns who are scarcely mentioned by the Brahmanical texts; this silence suggests that female renouncer movements, which gave new choices to women, may have been conceived by the Brahmanical orthodoxy as a threat to their own constructions of femininity (Ditrich 2010: 154).

## Buddhist Nuns

While female renouncers were largely ignored by Brahmanical texts, the non-Brahmanical movements such as Buddhism and Jainism supported female renunciation. The establishment of female monastic orders in Buddhism and Jainism was apparently a unique innovation; for the first time in recorded history, female renunciation was legitimised and institutionalised, thus providing a new option for women to leave behind domestic life with its social structures of class (*varṇa*) and, albeit to a much lesser extent, gender. However, as the texts narrate, the Buddha established the female monastic order with reluctance; he created an additional eight specific rules for nuns (*garudhammas*), which firmly positioned them, at all times, as inferior

6 In the Brahmanical tradition, renunciation was interpreted as abandoning the performance of rituals, and consequently, it was open only to those permitted to conduct rituals in the first place, namely, the three upper classes (*varṇa*) of men (Olivelle 1992: 60–75). Since women had no active role in sacrificial rites, there was no option for them to become a renouncer; from the ritual perspective, women were perceived as equal to the lowest class (*śūdra*).

to monks.<sup>7</sup> Many modern scholars suggest that these rules were aimed at protecting women (Anālayo 2016: 128–129) or were simply in line with the social norms of ancient India, which prescribed that women always had to be under male supervision (Horner 1963: 352–358; Collett 2016: 156–158). These assumptions mostly seem to be based on ancient normative legal texts and other literary sources, which should be questioned, as they do not necessarily reflect the actual position and realities of women themselves (Ditrich 2017: 154).<sup>8</sup>

From the Buddhist doctrinal point of view, women are regarded as soteriologically equal to men in their ability to attain spiritual liberation. This is evidenced by several accounts of women who became fully enlightened, renowned teachers, or even the bearers of Buddhist transmission such as Khujjuttarā, a woman of very humble background who became one of the chief disciples of the Buddha and even transmitted a body of texts, the *Itivuttaka* (Heim 2015: 145–148). Although women are certainly underrepresented in Buddhist literature, occasionally, though rarely, they would speak in their own voices: the *Therīgāthā*, an anthology of seventy-three poems, was composed by Buddhist nuns, presumably during the lifetime of the Buddha.<sup>9</sup> In these poems, the nuns express the joy of freedom from family life, their dedication to meditation, and the exultation of spiritual liberation (Schelling, Waldman 1996; Collett 2016). However, it should be underlined that these narratives, which underwent centuries of transmission and editing, represent only a minute fraction of the large body of Buddhist textual tradition (composed by and for men), and they have often been singled out by modern Buddhists and scholars as a kind of Buddhist apologetics within the framework of the modern (Western) enterprise of gender equality.<sup>10</sup>

Notwithstanding institutionalised female monasticism, which was allegedly an unprecedented option for women at the time, and several positive portrayals of women in the literary sources, Buddhism also contributed, like other ascetic movements, to misogyny. Women were frequently described as objects of male sexual desire, as malevolent temptresses that monks should avoid at all times (Paul 1979: 3–59; Sponberg 1992: 18–24). It should be highlighted that these positive and negative portrayals of female renouncers represent just two facets of multifarious constructs of femininity drawn from textual sources. As discussed by Salgado (2013: 11), contemporary Buddhist nuns frequently “challenge, ignore or simply bypass” the rules that position them as inferior to monks. It may be inferred that this was

---

7 For a comprehensive analysis of early Buddhist sources on the foundation of the nun’s order, see Anālayo 2016.

8 Research of modern Buddhist renouncers by Salgado (2013: 77–100) indicates that these restrictive rules are perceived by many contemporary Sri Lankan nuns as marginal or irrelevant.

9 For studies on the *Therīgāthā*, see Murcott 1991, Blackstone 2000, and Collett 2016.

10 The question of gender (in)equality in Buddhism is addressed in several studies: e.g., Cabezón 1992; Gross 1993; Salgado 2013; Anālayo 2016; Collett 2016.

likewise the case in the past; indeed, archaeological records suggest that the nuns may have been more independent, influential, and respected than what is implied in the textual representations of them. For example, ancient Buddhist inscriptions, especially those written before the end of the Gupta period, inform that nuns had their own economic agency (Schopen 1997: 238–257; Barnes 2000: 17–36) and were major donors, with significant independence and property ownership; hence, their prescribed subordination to monks may have had “no bearing on their legal and economic status” (Schopen 2014: 91). Nevertheless, it appears that from the middle of the first millennium CE, for various reasons, records about Buddhist nuns became increasingly sparse, implying that their social position may have gradually diminished (Paul 1985: 187–190; Schopen 1997: 250).

## Jain Nuns

While Buddhist nuns probably more or less disappeared from the Indian subcontinent by the mediaeval period, the female renouncers of other traditions remained, especially the seemingly unbroken institution of Jain nuns, spanning from the middle of the first millennium BCE to the present day. In contrast to Buddhist nuns who have received significant scholarly attention in recent decades, research on Jain nuns has been relatively scarce. Throughout history (until only recently), the Jain community remained mostly confined to the Indian subcontinent, and their female renouncers did not attract many Western scholars or practitioners, barring a few exceptions such as Charlotte Krause (Banthia, Soni 1999) and several modern researchers (e.g., Fohr 2006; Sethi 2012). According to historical records, Jainism was probably founded in northern India around the same time as Buddhism. The two traditions have many parallels in their teachings, social institutions, and monastic organisation but also major differences; above all, Jain monastics are expected to live a significantly stricter ascetic life. Like Buddhists, Jains established monastic orders for monks and nuns, supported by male and female lay communities, and formally positioned nuns as inferior to monks.<sup>11</sup>

Jains are broadly divided into two sects due to several doctrinal divergences, which include different views on gender: the Śvetāmbaras (“white clad”) believe that women are able to achieve spiritual liberation, whereas the Digambaras (“sky clad”), comprised of naked ascetics, claim that women need to be reborn as men in order to be liberated (Dundas 2002: 45–59).<sup>12</sup> Although both sects include male and female renouncers, most nuns belong to the Śvetāmbaras. Unlike other Indian renouncer traditions, Jainism has an unusual gender ratio among monastics: it seems that from

---

11 For a good overview of Jainism, see Dundas 2002.

12 For historical Jain debates on gender in which a distinction was made between biological sex and the psychological and social construct of gender (a rather unique premodern text that recognises these distinctions), see Jaini 1991.

the very beginning until the present day, nuns have largely outnumbered monks. According to the tradition, as stated in the *Kalpasūtra* (§133–135), at the time of the founder Mahāvira, there were 36,000 nuns and 14,000 monks; in addition, women also largely outnumbered men among the laity (Jaini 1979: 37). A similar ratio was identified in the demographic overview of Jain monastics in modern times (Flügel 2006). Some scholars explain this ratio by proposing that nuns were prevalently either widows or wives of ordained monks who would have presumably had several wives before joining the order (Jaini 1979: 37). This supposition, often also claimed for Indian female renouncers of other traditions, seems problematic and ungrounded, as it divests women of any spiritual agency.<sup>13</sup> In the late 1990s, Sethi (2012) conducted research with sixty-five contemporary Jain nuns and showed that they were not widows but almost entirely young unmarried women who had freely chosen to ordain, often despite family objections. They were highly inspired by their Jain tradition, especially the rich narrative literature, which provides strong positive images of female ascetics and elevates asceticism as the most ideal possible life. Renunciation was perceived by these women as a life of great independence, freedom, and opportunity to focus on the cultivation of detachment in the pursuit of spiritual goals (Sethi 2012: 123–128).

As in all other Indic religious traditions, textual representations of Jain femininity also feature contradictions and ambiguities, ranging from the valorisation of chaste wives and pious nuns to misogynistic images of dangerous, lustful temptresses. On the one hand, renunciation is presented as a mainly male pursuit, while women are often portrayed as detrimental to male ascetics (*ibid.*: 62–66). On the other, female renunciation is considered to be a legitimate and respected choice for women, and the monastic institution regarded as protective of nuns' chastity and hence a safe environment for girls and women (Fohr 2006: 161).

Jain nuns lead itinerant lives, collect alms, and follow the same rules as monks based on the five vows of total non-violence, truthfulness, non-stealing, celibacy, and detachment (Dundas 2002: 157–160). They are highly respected and generously supported by the lay community, especially within their kin networks from which many nuns are recruited. Although normatively subordinate to monks, they would often (indirectly) supersede the norms and consider themselves to be equal to monks in their social position and spiritual potential (Fohr 2006: 167). Occasionally, they even challenge the rules, as exemplified by a group of nuns from the *Sthānakavāsī* sect who attempted to abolish male hegemony in the ascetic ranks in the 1980s (Sethi 2012: 212–214). Although in the last few decades some groups of nuns have been increasingly engaged in social work, particularly in the health services and education (*ibid.*: 177–180), thus reflecting changes in twentieth-century India, their main concern remains religious practice, encompassing the cultivation of detachment in the

<sup>13</sup> According to Jain customary law, Jain widows would inherit their dead husband's property and would not be destitute (Sethi 2012: 90–93); hence, they would have no economic incentive to ordain.

pursuit of liberation. Their understanding of being female in the monastic context is primarily shown in their choice of the path of renunciation.

## Hindu Female Ascetics

Apart from Jain nuns, there have been many other groups of female renouncers in India, usually designated under the umbrella term “Hindu ascetics” (Denton 2004; Clémentin Ojha 2012). The resources and research on Hindu female ascetics of the past and present are very sparse, and only in the last few decades have they received some scholarly attention (e.g., Denton 2004; Khandelwal 2009; Bevilacqua 2017). One of the reasons for this paucity of information is that their communities have been dispersed among numerous sects and groups, and there is no known record of any exclusively female Hindu renouncer tradition before the twentieth century. As discussed above, according to the textual records, the Brahmanical path of renunciation was only accessible to men; nevertheless, this model was continuously challenged, particularly with the emergence and expansion of theistic and Tantric movements in India, which were open to all classes and genders. From the mediaeval period onwards, several literary accounts inform about female ascetics, mystics, and saints. Moreover, female renouncers also speak by themselves: for example, the famous *yoginī* Lāl Ded from fourteenth-century Kashmir (Hoskote 2013) or the saint and poet *Mirābāī* from the sixteenth century (Hawley, Juergensmeyer 2004) spoke in their own voices of their spiritual path, ecstasy, and the joy of liberation, and thus contributed to the vast depository of Indian devotional and mystical literature. They embodied spiritual liberation for women; however, because their status was considered divine and thus outside the human domain, they were exceptional individuals and, though inspiring, not role models for women at large (Clémentin Ojha 2012).

Within the abundant and long-standing Indian renouncer tradition, Hindu female renouncers were always marginal; women would join various male monastic groups or orders (*saṃpradāya*), provided that they were open to them. Various Śākta and Tantric ascetic groups were perhaps most welcoming: they honour the female body as sacred and consider all women to share in the Goddess nature. Consequently, they grant women reverence, authority, and independence, and frequently reject or even reverse the Brahmanical ideas of purity and asceticism (Khanna 2000). Though not mainstream, Tantrism has for centuries provided a domain where women have been respected despite the overarching constraints of patriarchy.

Generally, Hindu female renouncers share the same aims, practices, and institutions as their male counterparts within the particular group or tradition to which they belong. They undergo a form of initiation and bear specific visual signs of their affiliation such as bodily marks, shaven, loose, or matted hair, and white, red, or saffron clothes; these signs are vital for signifying the renouncer’s identity, affiliation, and related spiritual practices. In their pursuit of liberation, they mostly observe



celibacy, cultivate austerities, have various dietary restrictions, and perform a range of rituals, prayers, or meditations. There has been a remarkable plurality of Hindu female renouncers, and in contrast to their male counterparts, becoming an initiated female renouncer would involve a major shift – from the religious practices expected of laywomen, which are almost entirely dedicated to the welfare of others (primarily the husband and sons), to the life of a renouncer whose main religious focus is on themselves in the pursuit of self-liberation (Denton 2004: 34). Their links to society vary widely, hence the dichotomy of worldly/non-worldly applies to female renouncers to a significantly lesser extent than it does to their male counterparts: women can take celibacy vows and follow ascetic practices while staying in the domestic environment, or join a renouncer group and live a relatively stationary life, or become itinerant ascetics without retaining any family ties.

It was only in the twentieth century that predominantly or exclusively female monastic orders within Hinduism were established in India, reflecting the significant changes of the time such as colonial subjugation, encounters with Christianity, and the Hindu reformist movement (Sinclair Brull 1997: 7–22; Bachetta 2002: 157–176; Singh 200: 171–201). Perhaps the most well-known modern monastic group, with numerous centres worldwide, is that of the Brahma Kumaris, established in 1937. Despite being established by a man, it is largely comprised of female renouncers and run by women. This movement could be viewed, on the one hand, as a kind of feminist movement within “a distinctively Hindu idiom” (Babb 1986: 107) or, on the other, as a patriarchal attempt to control female sexuality (Chowdhry 1996: 2312). Their spiritual practice specially emphasises celibacy, since sexuality is viewed as the source of oppression for women in Hindu society. The movement represents a critique of traditional social structures that subordinate women in marriage, stating that husbands are not worthy of veneration and that female primeval divine status, autonomy, and freedom are gained through celibacy (Babb 1986: 141).

Often no clear boundaries are perceived between widows and female renouncers in modern India; one of the reasons may be in the similar appearance of certain groups of female renouncers who, like widows, dress in white, shave their head, and practice asceticism (Denton 2004: 19–21). This assumption is not only made for modern Hindu female renouncers but, interestingly, even projected onto early Buddhist and Jain nuns. Sweeping statements that deny female renouncers any agency are very problematic, and as shown in more recent research (Denton 2004: 41–55; Sethi 2012: 221–225), most female renouncers in India are not “victims” who are pushed to the margins of society, but on the contrary, it is their choice to dedicate their lives to asceticism and spiritual goals.

From what was said above, it may be proposed that the path of female renunciation constitutes the domain where Indian women have been able to articulate their agency the most. It is expressed mainly as the freedom to choose a way of life that is conducive to the pursuit of liberation, culminating in the transcendence of any construct of self or social agency, and is considered, in line with the overarching Indian

renouncer tradition, to be ultimately beyond all opposites. Thus, the classic dichotomies of public/private, lay/monastic, and worldly/non-worldly cannot easily be imposed on female renouncers, and modern attempts to construct a narrative about them can be contested (Salgado 2013: 30). The issues and perspectives explored by researchers may not at all be relevant for the renouncers who are the subject of research, since the cultural translation in theorising religion is prevalently conducted from the perspective of secular Western liberalism, as argued by Salgado (*ibid.*: 21–76) in her study of modern Buddhist nuns. To illustrate, from the Buddhist perspective, female renunciation is not so much about the liberation of self (from the constraints of patriarchal society) but rather the liberation *from* self, i.e., freedom from any construct of an “I,” ideally to be achieved through the cultivation of detachment and the relinquishment of the social self (Ditrich 2017: 158–160). In this light, terms such as “power,” “freedom,” and “equality” that have inevitably informed discussions about female renouncers and are linked to subjectivity and identity may need to be re-examined and used in a different sense (Salgado 2013: 197). Consequently, the issue of the un-translatability between different discourses (i.e., liberal universalistic Western and Buddhist) should be revisited, but primarily, female renouncers should be allowed not only to speak for themselves but also to be listened to more carefully.

In debating the various frameworks and discourses, it is proposed here that all the approaches that draw from textual and oral sources and investigate within various paradigms may be considered to be both necessary and valid: in studying female renouncer tradition(s), multiple facets need to be uncovered, as each one constructs its own standpoint and contributes to a more holistic representation.<sup>14</sup> Through diverse frameworks, the interplay of a range of conditions, causes, and parameters that contribute to the female renouncers’ lives could emerge, and coexisting multiple frameworks could perhaps even serve as an incentive for creating new methodological premises outside the extant scholarly research of female renunciation.

By way of recapitulation, it is evident that the ever-evolving Indian female renouncer tradition is by far too complex and multivalent, embracing numerous ambivalences and contradictions, to allow for generalisations; for every statement made, a counterexample can also be found. Nevertheless, some parameters or themes that seem to be frequently shared by most female renouncer groups in India deserve to be highlighted. Firstly, their diversity is significant: throughout history, the Indian female renouncer tradition has been dynamic and ever-changing, giving way to innovation as well as new doctrines and practices. In spite of their heterogeneity, they share the overarching common goal of the Indian renouncer tradition, i.e., the pursuit of liberation through various forms of asceticism, particularly celibacy and the cultivation of detachment. Their organisation varies: some live in large institutions (particularly the Jain monastics) and others in smaller, decentralised groups,

14 In such an approach, inspiration may be drawn from the ancient Jain doctrine of *anekāntavāda* (“doctrine on many-sidedness”), which embraces all standpoints as incomplete yet valid, as they are partial expressions of the totality (Dundas 1992: 229).

but nearly all of them are affiliated to organisations led by male renouncers who are normatively positioned as their superiors (though female renouncers would frequently consider this irrelevant). Female renouncers seem to have been more integrated into society than their male counterparts: they would commonly have closer links with their particular community and especially with their kin networks. Central to female (and male) renunciation is their lifestyle, encompassing ascetic practices, celibacy, and particular dress codes, whereas their beliefs and doctrinal premises are rather secondary.

## **INDIAN FEMALE RENOUNCERS AND CATHOLIC NUNS: REFLECTIONS AND SUGGESTIONS FOR FUTURE RESEARCH**

As mentioned in the beginning of this paper, this research forms part of a larger project investigating female Catholic missionaries in twentieth-century India. It aims to present a panoramic historical outline of female renouncers in India, which would serve as a backdrop for the investigation of the encounters between Catholic nuns and indigenous Indian female renouncers.

As underlined by Singh (2000: 8), a considerable body of textual accounts on India by Christian missionaries is available, but surprisingly little is known about the perspective of the receiving culture regarding the perceptions of, interactions with, and responses to Catholic female missionaries among the recipients, i.e., Indians of various religious backgrounds and social classes, and especially women and female renouncers who may have perceived Catholic nuns differently from their male counterparts. Hence, by way of conclusion, this paper enquires whether one of the multiple parameters contributing to the reception of Christianity in India (and Catholic nuns in particular) could have been the millennia-long Indian renouncer tradition, with its inherent respect for any individual opting for the spiritual path. To explore this question, some of the main commonalities between the Christian and Indian female renouncer traditions will be briefly noted, and a few directions proposed for further research.

Firstly, both female renouncer traditions have a long history and share the similar aim of spiritual liberation or salvation, though understood within very different frameworks and founded on distinct doctrinal assumptions. A commonality could be found in the monotheistic Christian faith in one God, which may have resonated with the Hindu devotion to a god or goddess, considered to be one of the many paths to spiritual liberation. Particularly within the theistic movements, Indian female renouncers would often perceive their life of chastity and devotion as a sort of marriage to the deity they worship (Hawley, Juergensmeyer 2004); hence, the question can be posed whether and to what extent this Indian devotional attitude could be comparable to the representation of Catholic nuns as “brides of Christ.”

Another overlap between the two traditions lies in the area of social action, perceived as a spiritual path. Although the Indian renouncer tradition is founded on the premise that worldly life is intrinsically problematic and cannot be fundamentally “improved,” but should instead be transcended by leaving behind the cycle of re-births, social engagement as a spiritual path was not completely absent (e.g., from the idea of renunciation in action in the *Bhagavadgītā* to revalorisation of asceticism linked to social action by Gandhi). However, explicit social work was not taken as a central religious practice until the changes brought about by the colonial experience in the late nineteenth and early twentieth centuries (e.g., the Ramakrishna Mission; see Sinclair-Brull 1997). In comparison, the focus on the social engagement of Catholic nuns, though more pronounced among certain orders than others, received a major stimulus in the twentieth century, with the primary aim to engage with the oppressed, poor, and sick. Conversely, in the Indian religious discourse, difficult life circumstances are commonly perceived to result from one’s *karma*, and thus renunciation is commonly understood as a path to a better future life or complete spiritual liberation. Still, social action as a spiritual practice, albeit not the main path for renouncers, has a long history in India and is therefore not considered to be entirely alien to spiritual practice; thus, we may ask whether the Indian tradition of social action may have played a role in allowing Catholic nuns to engage in social missionary activities, understood by the receiving culture as legitimate spiritual practice.

A further important commonality between the two traditions is monasticism: despite a great variety of decentralised groups and affiliations among Indian female renouncers, some are organised in larger monastic institutions such as Jain nuns, and thus they bear comparison with Catholic monasticism. Both Jainism and Catholicism uphold the ideal of the renunciation of worldly life, including celibacy and ethical living. For Catholic monastics, this would involve vows of poverty, chastity, and obedience across all denominations, whereas the vows and practices are more diverse among Indian renouncers. For Indian ascetics, their external appearance, including particular dress codes, hairstyles, and other signs, is a vital corollary, signifying the renouncer’s identity and social recognition, whereas their doctrinal views and beliefs, which are of an exceptional variety and fluidity among the various traditions, would be less important. Traditionally, the dress code also defined Catholic nuns, but it was never a central component, since their faith was considered of preeminent significance. Hence, in contrast to Indian renouncers, many female Catholic orders in the twentieth century, after the Second Vatican Council in 1965, replaced their traditional habit for lay clothes; it may be worth investigating how indigenous Indian Catholic nuns perceived and adjusted to this innovation.

Yet another significant commonality between the two traditions is female empowerment through renunciation, which may serve, within the constraints of patriarchy, as a platform for expressing female agency, though understood within rather different contexts. The focus of Indian laywomen on serving others (mainly their husband and family) would shift through renunciation to their own pursuit of spiritual

liberation (Denton 2004: 34), whereas for modern Catholic female missionaries, the path to salvation is primarily envisaged by serving others (mainly the poor, sick, and destitute). Hence, in their serving roles, female Christian missionaries were often perceived as maternal figures (Singh 2000: 25), and consequently, it can be asked whether, with their maternal image, they may have been regarded within the prevalent Indian patriarchy as more acceptable (and less threatening) to the religious and political structures than their male counterparts.

As indicated in these preliminary reflections and questions, the religious context of India, which Catholic nuns entered in the twentieth century, may have had a sufficient intersecting space between the two discourses, which could be viewed as one of many historical conditions that would have provided the grounds for Christian nuns to be accepted and understood, however differently. This paper suggests that the commonalities between the Catholic and indigenous Indian renouncers may have been one of the parameters that contributed to the recognition, respect, and support of Christian nuns in India during the colonial era and allowed them to engage in communal activities, which may have been perceived by the recipient culture as one of many legitimate spiritual practices. Undoubtedly, these contentions, questions, and suggestions require further exploration and scholarly attention.

## REFERENCES

- Anālayo (2016). *The Foundation History of the Nun's Order*. Bochum: Projektverlag.
- Babb, Lawrence A. (1986). *Redemptive Encounters: Three Modern Styles in the Hindu Traditions*. Berkeley: University of California.
- Bachetta, Paola (2002). Hindu Nationalist Women: On the Use of Feminine Symbolic to (Temporarily) Displace Male Authority. *Jewels of Authority: Women and Textual Tradition in Hindu India* (ed. Laurie L. Paton). Oxford: Oxford University Press, 157–176.
- Banthia, Hazarimull, Luitgard, Soni (eds.) (1999). *German Jaina Śrāvikā Dr Charlotte Krause: Her Life and Literature*. Vol. 1. Varanasi: Pārśvanātha Vidyāpiṭha.
- Barnes, Nancy J. (2000). The Nuns at the Stūpa: Inscriptional Evidence for the Lives and Activities of Early Buddhist Nuns in India. *Women's Buddhism, Buddhism's Women: Tradition, Revision, Renewal* (ed. Ellison Banks Findly). Boston: Wisdom Publications, 17–36.
- Bevilacqua, Daniela. 2017. "Are Women Entitled to Become Ascetics? An Historical and Ethnographic Glimpse on Female Asceticism in Hindu Religions." *Kervan International Journal of Afro-Asiatic Studies* 21: 51–79.
- Black, Brian (2007). *The Character of the Self in Ancient India: Priest, Kings, and Women in the Early Upaniṣads*. Albany: State University of New York Press.
- Blackstone, Kathryn R. (2000). *Women in the Footsteps of the Buddha: Struggle for Liberation in the Therīgāthā*. Delhi: Motilal Banarsidass.

- Cabezón, José Ignacio (ed.) (1992). *Buddhism, Sexuality and Gender*. Albany: State University of New York Press.
- Chowdry, Prem (1996). Marriage, Sexuality and the Female Ascetic: Understanding a Hindu Sect. *Economic and Political Weekly* 31/34: 2307–2321.
- Clémentin Ojha, Catherine (2012). Female Ascetics. *Brill's Encyclopedia of Hinduism* (eds. Knut A. Jacobsen, Helene Basu, Angelika Malinar, Vasudha Narayan), [http://dx.doi.org/10.1163/2212-5019\\_beh\\_COM-9000000011](http://dx.doi.org/10.1163/2212-5019_beh_COM-9000000011) (5. 2. 2019).
- Collett, Alice (2016). *Lives of Early Buddhist Nuns: Biographies as History*. New Delhi: Oxford University Press.
- Denton, Lynn Teskey (2004). *Female Ascetics in Hinduism*. Albany: State University of New York.
- Ditrich, Tamara (2010). The Presentation of Motherhood in the Law Code of Manu. *Mother-texts: Narratives and Counter Narratives* (eds. Marie Porter, Julie Kelso). Newcastle upon Tyne: Cambridge Scholars Publishing, 143–163.
- Ditrich, Tamara (2017). Identity and Gender: A Buddhist Perspective. *Women against war system* (eds. Nadja Furlan Štante, Anja Zalta, Maja Lamberger Khatib). Wien, Zürich: Lit. Verlag, 145–164.
- Dundas, Paul (2002). *The Jains*. London, New York: Routledge.
- Flügel, Peter (2006). Demographic Trends in Jaina Monasticism. *Studies in Jaina History and Culture: Disputes and Dialogues* (ed. Peter Flügel). London: Routledge, 312–398.
- Fohr, Sherry E. (2006). Restrictions and Protection: Female Jain Renouncers. *Studies in Jaina History and Culture: Disputes and Dialogues* (ed. Peter Flügel). London: Routledge, 157–180.
- Gross, Rita (1993). *Buddhism after Patriarchy: A Feminist History, Analysis, and Reconstruction of Buddhism*. Albany: State University of New York Press.
- Gombrich, Richard F. (1988). *Theravāda Buddhism: A Social History from Ancient Benares to Modern Colombo*. London: Routledge and Kegan Paul.
- Hawley, John Stratton, Juergensmeyer, Mark (2004). *Songs of the Saints of India*. Delhi: Oxford University Press.
- Heim, Maria (2015). She Who Heard Much: Notes on Receiving, Interpreting, and Transmitting Buddhavacana. *International Journal of Hindu Studies* 19/1–2, 139–156.
- Horner, I. B. (trans.) (1963). *The Book of the Discipline (Vinaya-Piṭaka)*. Vol. 5. London: Luzac and Co.
- Jaini, Padmanabh S. (1979). *The Jaina Path of Purification*. Berkeley: University of California Press.
- Jaini, Padmanabh S. (1992). *Gender and Salvation: Jaina Debates on the Spiritual Liberation of Women*. New Delhi: Munshiram Manoharlal.
- Hoskote, Ranjit (trans.) (2013). *I Lalla: the Poems of Lal Ded*. New Delhi: Penguin Books.
- Khandelwal, Meera (2009). Research on Hindu Women's Renunciation Today: State of the Field. *Religion Compass* 3/6: 1003–1014.

- Khanna, Madhu (2000). The Goddess-Women Equation in Śākta Tantras. *Faces of the Feminine in Ancient, Medieval and Modern India* (ed. M. Bose). New York: Oxford University Press, 109–123.
- Murcott, Susan (1991). *The First Buddhist Women: Translations and Commentary on the Therīgāthā*. Berkeley: Parallax Press.
- Olivelle, Patrick (1992). *Samṇyāsa Upaniṣads: Hindu Scriptures on Asceticism and Renunciation*. New York, Oxford: Oxford University Press.
- Olivelle, Patrick (1998). *The Early Upaniṣads: Annotated Text and Translation*. New York, Oxford: Oxford University Press.
- Olivelle, Patrick (2004). Rhetoric and Reality: Women's Agency in the Dharmaśāstra. *Encounters with the Word: Essays to Honour Aloysius Pieris s.j. on his 70<sup>th</sup> Birthday* (eds. Rober Crusz, Marshal Fernando, Asanga Tilakaratne). Colombo: The Ecumenical Institute for Study and Dialogue, 489–505.
- Olivelle, Patrick (2011). *Ascetics and Brahmins: Studies in Ideologies and Institutions*. London, New York: Anthem Press.
- Paul, Diana (1985). *Women in Buddhism: Images of the Feminine in the Mahāyāna tradition*. Berkeley: University of California Press.
- Salgado, Nirmala S. (2013). *Buddhist Nuns and Gendered Practice: In Search of the Female Renunciant*. Oxford: Oxford University Press.
- Schelling, Andrew, Waldman, Anne (trans.) (1996). *Songs of the Sons and Daughters of Buddha*. Boston: Shambala.
- Schopen, Gregory (1997). *Bones, Stones, and Buddhist Monks: Collected Papers on the Archaeology, Epigraphy, and Texts of Monastic Buddhism in India*. Honolulu: University of Hawai'i Press.
- Schopen, Gregory (2014). On the Legal and Economic Activities of Buddhist Nuns: Two Examples from Early India. *Buddhism and Law: An Introduction* (eds. Rebecca Redwood French, Mark A. Nathan). New York: Cambridge University Press, 91–114.
- Sethi, Manisha (2012). *Escaping the World: Women Renouncers among Jains*. New Delhi, London: Routledge.
- Sinclair Brull, Wendy (1997). *Female Ascetics: Hierarchy and Purity in an Indian Religious Movement*. Richmond: Curzon.
- Singh, Maina Chawla (2000). *Gender, Religion, and "Heathen Lands": American Missionary Women in South Asia (1860s–1940s)*. London, New York: Routledge.
- Sponberg, Alan (1992). Attitudes Toward Women and the Feminine in Early Buddhism. *Buddhism, Sexuality and Gender* (ed. José Ignacio Cabezón). Albany: State University of New York Press, 3–36.
- Walshe, Maurice (trans.) (2012). *The Long Discourses of the Buddha: A Translation of the Dīgha Nikāya*. Boston: Wisdom Publications.

## POVZETEK

### ODPOVED INDIJSKIH ŽENSK POSVETNEMU ŽIVLJENJU: POZABLJENO POGlavJE V ZGODOVINI INDIJSKIH RELIGIJ

Tamara DITRICH

Avtorica položaj žensk v indijskih asketskih tradicijah obravnava z namenom predstavitve širšega indijskega verskega konteksta, v katerega so vstopale in v njem delovale katoliške misijonarke. Raziskava, na kateri sloni prispevek, je del širšega raziskovalnega projekta o delovanju slovenskih katoliških misijonark v kolonialni Indiji v 20. stoletju.

Prispevek najprej uvede večtisočletno tradicijo indijskega asketizma in monasticizma ter oriše njihove glavne verske predpostavke in prakse. Pri tem se osredotoča na položaj žensk v starih indijskih asketskih tradicijah – temu področju so tako tradicionalni indijski viri kot sodobni znanstveniki doslej posvečali le malo pozornosti. Odpoved posvetnemu življenju kot poti k duhovni osvoboditvi ima v Indiji starodavne korenine, o čemer pričajo že najstarejša besedila iz prvega tisočletja pr. n. št. Največja zakladnica informacij o asketskih gibanjih so tri glavne staroindijske duhovne tradicije – brahmanizem (oz. hinduizem), budizem in džainizem. V okviru omenjenih treh tradicij prispevek kritično raziskuje (z različnih perspektiv) vlogo žensk, njihovo avtonomijo in družbene omejitve. Predstavi konstruktivne normativnih postavk za ženske v brahmanizmu ter razpravlja o prvih monastičnih ženskih redovih v budizmu in džainizmu.

Avtorica ugotavlja, da je večtisočletna tradicija indijskih ženskih asketinj in nun izjemno kompleksna in mnogovrstna ter zaobjema številne ambivalentnosti in nasprotja, a je po njenem mnenju mogoče identificirati nekaj glavnih tem, ki so skupne večini asketskih in monastičnih skupin. Najbolj vseobsegajoča skupna tema vseh tradicij je njihov cilj – pot do duhovne osvoboditve, ki vključuje odpoved posvetnemu življenju, raznolike asketske prakse in celibat. Asketinje, ki so živele v okviru različnih institucij, od velikih monastičnih organizacij (npr. džainske nune) do manjših decentraliziranih skupin, so bile vedno normativno podrejene moškim, a so svojo podrejenost pogosto doživljale kot nerelevantno.

Na koncu prispevka avtorica razmišlja o srečanju katoliškega in indijskega verskega diskurza in skuša identificirati pomembna stičišča med indijskimi asketinjami in katoliškimi nunami. Pri tem se sprašuje, ali niso prav ta stičišča pripomogla k temu, da so bile katoliške misijonarke v kolonialni Indiji deležne podpore Indijcev, ki so morda njihovo družbeno angažiranost razumeli kot eno od legitimnih duhovnih praks v indijskih religijah.



# THE TONGUE IS MIGHTIER THAN THE PRINTING PRESS? REFLECTIONS ON THE PRODUCTION OF ORAL HISTORIES AND ON LANGUAGES OF LEGITIMATION

Benjamin ZACHARIAH<sup>I</sup>

COBISS 1.01

## ABSTRACT

### **The Tongue is Mightier than the Printing Press? Reflections on the Production of Oral Histories and on Languages of Legitimation**

The article is a set of reflections on the uses of oral history in a communicative endeavour that succeeds very often in effacing the role of the interviewer even as the demands of self-reflexivity insist on centring that role. The author considers cases where there is neither a clearly defined interviewer nor interviewee, nor is there an attempt to write down experiences as history. Following this, it asks what can be told in or by oral histories when the communication that produces them seeks to recover otherwise inaccessible histories and memories, but must use languages of legitimation that often cannot speak clearly about those inaccessible histories and memories.

**KEY WORDS:** legitimation, writing, history, reification, collective memory

## IZVLEČEK

### **Ali je jezik močnejši od tiskane besede? Razmišljanja o produkciji ustnih zgodovin in jezikih legitimitete**

Članek prinaša nekaj razmislekov o uporabi ustne zgodovine v komunikaciji, v kateri je vloga spraševalca pogosto podcenjena, čeprav bi potreba po samorefleksiji terjala ravno nasprotno. Avtor navaja primere brez jasno opredeljenega spraševalca in intervjuvanca, kakor tudi brez zapisa dogajanja kot zgodbe. Posledično se sprašuje, kaj vse ustna zgodovina lahko sporoča, če si komunikacija, v kateri nastajajo ustni zgodovinski viri, prizadeva oživljati sicer nedostopne pripovedi in spomine, hkrati pa mora uporabljati neki jezik legitimitete, ki pa teh pogosto ni sposoben jasno izraziti.

**KLJUČNE BESEDE:** legitimiteta, pisanje, pripoved, reifikacija, kolektivni spomin

<sup>I</sup> PhD in History, Senior Research Fellow, Forschungszentrum Europa, University of Trier, Universitätsring 15, D-54296 Trier; zachariah@uni-trier.de — The author would like to thank Anna Diem, Ana Jelnicar, Lutz Raphael, Debojit Thakur, and two anonymous referees, for engaging closely with the text of this essay.

## INTRODUCTION

The trouble with oral history has been documented at length by several of its practitioners, opponents and sceptics. It is still agreed, however, that oral histories open up areas that other histories fail to reach: the tongue is more flexible than the pen or the printing press in many respects. But how can communication happen without articulation in languages that are legitimate to both speaker and listener, to interviewer and interviewee? And what if that common language cannot be found? Historians have been uncomfortable with oral history for the recovery of event-history, but many have been persuaded of the value of oral history for the recovery of subjectivities or affect. This is congruent with the cultural or civilizational hierarchy usually implied between the oral and the written; and as there has been an implied progression from the first to the second, the latter has usually been seen as a higher form of "culture", though there have also been tendencies to reverse that hierarchy. However, the former is not replaced or effaced by the latter: as Jack Goody once put it, "it is a mistake to divide 'cultures' into the oral and the written: it is rather the oral and the oral plus the written, printed, etc. This being the case, for the individual there is always the problem of the interaction between the registers and the uses, between the so-called oral and the written traditions" (Goody 1987: xii).

It is this problem of interaction, in the field of oral history, that this essay seeks to address. Much of it is concerned with the tension between two situations: the first, in which what one says about the historical work one does, *in being written down*, ceases to be legitimate, because it is based on the consensus, *entre nous*, that we as professionals know what we are doing, and that we understand and obey the standards of a self-regulating profession to which we all hold one another; however, if we write it down, it is often subject to forms of scrutiny that make it clear that as oral history it is not worth the paper it is written on. In the second situation, this seems at first glance to be the other way around: in the production of oral histories by interviewer and interviewee, the interviewee's memories *become* history when the interviewer writes it down, and mere memory ascends the ladder of knowledge hierarchies to legitimate history.

As they went about writing down oral accounts, "oral historians" were producing a *reification* of some forms of memory *as history*, which in their own framework as much as that of their interviewees was more legitimate than mere "memory", taking us back to Maurice Halbwachs in the 1920s, who believed that "collective memory" had to be carefully taught (Halbwachs 1992 [1925]), and to Pierre Nora in the 1980s and 1990s, where he conceded that historians were themselves "sites of memory" (Nora 1989: 7). Historians, and oral historians prominently so, were democratically inventing traditions (Hobsbawm, Ranger 1983) whose claims to validity, depth, or longevity was difficult to assess, and could be used to bolster parochial narratives of "community" (a word that occurs with alarming regularity in a number

of oral histories written down), or to produce or disarm languages of legitimation (Skinner 1988; Zachariah 2005: 13–14; 2019: 129–148). It was clear that event-history is hard to find in oral accounts: people misremember events, and/or transpose them to times and spaces where they make more psychological sense (Portelli 1991; Polishuk 1998). It follows that there are situations in which the sitting together of interviewer and interviewee does not produce a narrative that deviates significantly from an established, conventionalised language of legitimation. By “languages of legitimation” we are referring to the need, according to the normative rules of a given communicative context, to tailor your argument to fit an available language; you could manoeuvre away from that language and innovate, but not without reference to that language, which as a result becomes a constraining as well as a legitimating frame (Skinner 1988).

Two examples that can be used to illustrate this are that of partition narratives from South Asia, and tales of academic plagiarism that academics recount to one another *but do not write down*, in any public sense.<sup>1</sup> In the first case, the disjuncture between the written record and oral histories is often stark; but there is an almost Stakhanovite desire to produce more oral histories, as museums, universities and hordes of researchers vie with each other in a scramble for the memories of those about to die. In the case of academic plagiarism, the proliferation of narratives among professionals in the field, to the occasional horror of non-academics who overhear these discussions, is not matched at all by a serious public debate on the matter; and indeed, no attempt to write down oral histories of plagiarism, given that it is far from rare, can proceed without a delegitimation of the profession.

I started thinking seriously about this subject after a series of discussions that began with my being invited to speak in Ljubljana on the possibilities and limitations of oral history as part of a project called “Slovene Women Missionaries in India: A Forgotten Chapter in Intercultural Relations”. This involved tracing the life stories of twelve Slovene nuns (all but one of whom are dead), who had gone to India in the course of the 20th century. The project relies heavily on doing oral history, and much of this is second-“generation” testimony, given the death of the original protagonists. The questions of how their stories are told, which are raised in other essays of the special issue of this journal, must take into account the tensions between a (theological?) language of legitimacy that befits the needs and imperatives of the Catholic Church and the orders of which they were a part; but their ability to tell their stories at all requires an ability to deviate from or manoeuvre within that language of legitimacy; and also to find a communicative register in which to speak to those who are not a part of that language community. My essay here is a response, with different material, to what I regard as analogous problems.

---

1 Traces might of course be found in traditional written sources as historians write notes or letters to one another, or increasingly in emails or posts on social media.

I should include a caveat here. As with so many “theoretical” or “(self-)reflexive” essays that claim to address disciplinary problems, this too is an essay by a non-practitioner of the craft that the author claims to assess: my attempts at oral history have been colossal failures.<sup>2</sup> And so it goes that failures turn into methodological reflections.

## ORAL HISTORY: THE (WRITTEN) STORY SO FAR

Historians like their evidence to be dead. Dead people don’t talk back. And you can fix what they say in terms of something that has already left a written trace, knowing full well that the written trace is a very small part of the theoretical set of things that “happened”. Anthropologists, on the other hand, so they say (or so I have gathered in some conversations I’ve had with anthropologists), live with live people, and write about people’s “life worlds”, with a methodology that seems to rely on “somebody told me”, tempered by “I was there for long enough to know” (which is an interesting comparison to the historians’ “it’s more complicated than that”, followed by silence as you await an explanation). Since these conversations were not written down, once can of course ask me “How do you know you actually had this conversation?” and I can say “I can’t tell you but actually I did”, or that I have a few notes and a diary saying that I had that conversation, but I could have made that up as well. Oral history is not very different from the anthropologists’ “somebody told me”, and without the tempering factor of a long presence, because it is usually in retrospect, about events that happened “in the past” (how long ago is the past?), and (more so) about latter-day processing of those events: most oral historians would not be looking for event-history in their work. All of this is of course not always borne out by the written accounts of what anthropologists say they do, or what oral historians say they do, after they have been allowed to clean up the glitches and present their work as “wissenschaftlich”. And then, of course, it takes you to the fact that any kind of encounter between two human beings being communicative is not about what actually happened in the past or present, but about how two people are trying to manoeuvre each other into a context where they get something out of each other in the present, and governed by relatively non-methodological concerns such as whether they like or dislike one another (Yow 1997).

If we look at this from our current standpoint, after what we might consider the postmodern and postcolonial diversion where we as historians were interested in subjectivities but at the same time interested in *judging* these subjectivities against

2 My favourite instance of this was when, during a project on how “development” was understood in the 1930s and ‘40s, I was disturbed that my interviewee appeared to be reproducing Ashis Nandyisms from the 1980s, which would hardly have been available to him as a young man, and which by now most people outside those in the wave so named will no longer recognise. When he started a sentence with “as my friend Ashis Nandy said ...”, I was of course able to reposition the interview as part of the 1980s post/antidevelopmental moment (Benjamin Zachariah, interview with anonymised respondent, Delhi, November 1996).

some kind of nonhistorical or superhistorical norm (the “enormous condescension of posterity”, in E. P. Thompson’s famous phrase) (E. P. Thompson 1963: 12), there was the problem of readings of history beyond and outside the context that was available to historical players in their own times. In some ways, oral historians are doing exactly that: they are dealing with people’s memories after the event, several years down the line where the framing of the material is very different, and the original “trace”, not stabilised by being written down in its own time, cannot be separated from the framing.

It was of course once assumed, and still mostly is, that oral histories were important because they were more “democratic” (Anderson et al. 1987; Perks, Thomson 1998; Abrams 2010; Perks, Thomson 2015; Yow 2015; Thompson 2017). “[T]he richest possibilities for oral history lie within the development of a more socially conscious and democratic history”, Paul Thompson wrote in *The Voice of the Past* in 1978, a text that has become, in successive editions, the standard handbook or gospel, depending on one’s preferred metaphor, for oral histories and oral historians (Thompson 1978, reprinted in Thompson 2000: viii). (It was not before the 3<sup>rd</sup> edition that Thompson’s *Voices* offered a definition of oral history, not his own, but that of the *New Shorter Oxford English Dictionary* from the 1990s: “tape-recorded historical information drawn from the speaker’s personal knowledge; the use or interpretation of this as an academic subject”: P. Thompson 2000: xi). Oral history provided interviewer and interviewee with the ability to *co-author* the histories of which they were a part; indeed, this could be the living embodiment of the meanings of “history” as both past-ness and the processing and making sense of the past in the present. Could it then be said that oral history was a communicative endeavour that succeeded very often in *effacing* the role of the interviewer even as the demands of self-reflexivity insist on *centring* that role? The co-authorship idea, of course, still implicitly assumed the primacy of interviewer over interviewee, for who would expect an ordinary person with memories to record to seek out an interviewer in order to record his or her memories as history? There was also more than a hint of social engineering implied in the selection of subject. “As oral historians, we need to develop techniques that will encourage women to say the unsaid” (Anderson et al. 1987: 104). The desire that history be relevant and “public”, and indeed accessible to its protagonists, was also to lead to an insistence that professionals had no particular insight into history that was qualitatively better by any standards than the public understanding of history. And ironically, it was a Raphael Samuel from the Communist Party of Great Britain’s renowned Historians Group rather than a right-wing populist who paved the way to “heritage” being reclaimed as public history (Samuel 1994, 1998; Scott Brown 2017).

The harmonious development of non-antagonistic and co-existing forms of oral history was usually assumed by its practitioners, though sometimes not: indeed, the 3<sup>rd</sup> edition of *Voices* notes “the potential seeds for sectarian fragmentations”, in part already reflected in a diversification of the terminology of oral history practices; but this acknowledgment appears only in the preface, which glosses over

it quickly (P. Thompson 2000: xii). (A West German tradition of oral history that did not assume a non-confrontational and shared language of legitimation between interviewer and interviewee, dealing with the Nazi past or denazification, existed, for instance, even as West German historians acknowledged the influence of American models of oral history: for a retrospective account see Niethammer 2017.) Strangely enough, the idea that conflictual situations produce oral histories that are not necessarily celebratory or “self”-making and indeed can exacerbate memories of trauma and vulnerability or generate tragedy by making interviewees vulnerable to retribution or retaliation, and that the oral historian had a responsibility to do no harm, was a long time in becoming the profession’s common sense” (Yow 1995; A. Thomson 2007). This was to some extent an “insight” intensified by the Yugoslav wars of succession and secession, and the Rwandan massacres (Jessee 2011), even as “trauma” entered a burgeoning field of “memory studies”, mostly as an offshoot of studies of the massacres of European Jewry during the Second World War, and the idea of a trauma that passed (via “collective memory”?) to the next generation and beyond (La Capra 1999, 2001).

## PARTITION NARRATIVES FROM SOUTH ASIA

Oral histories of the Partition of India fit very well into the themes of democratisation and of trauma. When these oral histories made their appearance, readers had been acclimatised to treating the event-history of Partition in terms of an archival narrative of political negotiations of a “transfer of power” on the one hand, and a “communal war of succession” on the other; and connections between even those two narratives were difficult to establish (Asim Roy 1990; Zachariah 2004: 120–138; Dwai-payan Sen 2012). A dark counterpoint to these historical narratives had always existed: eyewitness accounts published as first-person and sometimes autobiographical narratives (Khosla 1949; Moon 1962) or fictionalised studies of the horrors (Raza 1994 [1967]; Sahni 2001 [1974]; Manto 2014 [c. 1947]). The difficulties with first-person accounts are those of verifiability, of course; and the incomprehension with which contemporaries encountered the events as they happened of course made it particularly important to process the experiences and to give them some meaning in retrospect. Perhaps Manto’s relentless and brutal telling of small anecdotes drawn from the wider carnage was one way to make sense of brutality by recounting it in its utter banality, like the story of a Sikh man’s frustrated love for a Jewish woman in Karachi, her attempt to help him find and rescue the object of his current affections, and her consequent death: the story is told in a manner in which characters live amidst impending death without taking their own likely death too seriously (Manto 2014 [c. 1947]: 58–72).

If we, on the other hand, want to follow the proliferation of stories about partition that are narrated in (written) collections of interviews (which makes them different

from what is retold in memoirs, but exactly why is probably an interesting question, taking into account the different communicative contexts), framed by the expectations of affect, we might consider that they are often lies; and probably often deliberate ones as well. Told by interviewees to interviewers in different socio-political contexts, where the demands and expectations of each are shifting, this is where it is possible, and imperative, to observe that idioms of expression conform to languages of legitimation; and when that language of legitimation is uncertain, interviewer and interviewee play out a guessing game where they fluctuate among different such languages. But there are not only lies to be had of these situations: lies emerge when it becomes impossible to acknowledge a difficult transgression, for instance that the interviewee was a member of a paramilitary organisation that conducted organised killing and looting of property, and was involved in ethnic cleansing (a retrospective term but one that was already in use by the 1990s when the interviewing wave began); the presence of “abducted women” in one’s family. Equally, interviews often broke such silences, for instance in the case of the “abducted”, who were often women who were forcibly removed from their families and claimed as property by members of another “community”, but were also sometimes women who made active choices for practical or affective reasons to live with a man, but (even when they lived according to the new religions) were often considered implicit outsiders (again, this is sometimes better captured in fiction: see Sidhwa 1988). The “abducted women” were a question of the national honour of two new states and were treated as such (Menon, Bhasin 1998); what they might have wanted was less important, and “rescuing” abducted women by tearing them away from their new circumstances to “return” them to their communities and the states that claimed those communities was one way of ensuring a miserable and stigmatised life afterwards. These stories are recounted, but the overall narrative gravitates back to one of a temporary madness that afflicted everyone, which sits rather badly with another narrative that also makes its appearance: that of the impossibility of forgiving “them” for what they have done to “us”, or equally, that “they” have now been forgiven by “us”: reconciliation and forgiveness stories also make good affective material.

Given that potential to read the fluctuations in legitimating languages, it is peculiar that the difficulties with these accounts largely do not emerge as points of discussion among oral historians/ interviewers to the extent that they ought: for instance, one very well-known collection of accounts of partition experiences was published after 1992, a landmark date in the history of the legitimating vocabularies of South Asia; and the interviews were done on either side of that date. But the accounts produced take no account of this (Butalia 1998). 1992 was the date of the mobilisation of self-proclaimed “Hindu” mobs by the fascist party that as I write is in government in India, the Bharatiya Janata Party, to destroy a 16<sup>th</sup> century mosque in Ayodhya. The subsequent breakdown of an old language of legitimacy is of interest: suddenly, the presence of Hindu sectarians and the legitimacy of openly anti-Muslim sentiments was palpable (see Ludden 1996). Butalia foregrounds the anti-Sikh

pogroms in Delhi in 1984 in the aftermath of the assassination of Indira Gandhi by her Sikh bodyguards, itself a response to her ordering the army into the Golden Temple in Amritsar in pursuit of “militants”; and goes on to place the Ayodhya demolitions and accompanying and subsequent violence in the same continuum; but she comments not on the changes to ways of speaking legitimately about intercommunal relations, saying instead that Partition “could not so easily be put away” and it “lived on in so many people’s lives” (Butalia 1998: 6–7).

Many stories are nonetheless told in whispers, and never written down. A Sikh family in which an uncle’s wife, as she got older, expressed a desire to be buried: never, of course, acknowledged by the rest of the family. However loudly and publicly she said it, this was considered an eccentricity of old age. She was of course cremated when she died, but some younger members of the family had figured something out: “It was only then that we started thinking, she must have been one of the abducted women.”<sup>3</sup> Fictional accounts are often able to be more direct: Manto’s short stories are clear that the narrative about partition that one hears from “Zeitzeugen” – witnesses to the time – are not accurate. “We all went mad”, is the oral history narrative – epitomised and backed up by the (written) history of Gandhi as Lord Mountbatten’s “one-man boundary force” in 1947, and the story of his securing from communities (by which is meant their leaders) a semblance of peace at Noakhali after the riots there in October 1946. But Noakhali was when Gandhi came after the violence had subsided: the local political influencer Golam Sarwar Hosain had had his revenge on the Roy family, and remorse could now be shown, often by people who were not directly involved in the violence but took it upon themselves to be remorseful on behalf of their “community” (S. Roy 1999). In Manto’s world, armed bands of men looted property, raped women and murdered everyone they could – and the motives were not community honour, but much baser instincts were at play. And this is more in consonance with what we know from archival research: local *goondas* and organised paramilitary gangs had been operating for years under the patronage of every political party and faction, and their moment had finally come (Maclean, Zachariah 2019).

Still, it has become something of an industry to collect narratives of partition among “oral historians”. In a car park in Lucknow, the former capital of Awadh, a city of romantic legends and culinary fantasies, I once sat in on a conference call among people working on the partition of Partition narratives, which appears to be a prominent candidate for the dominant oral history project of our times; and I had an all-too-expensive coffee at Khan Market with the person widely seen as the mastermind of the project, a former physicist whose Indian (Punjabi) roots contributed to her interest in the project.<sup>4</sup> A hundred-odd people, it can be crudely estimated (or the estimate, being from among those working in the project, might be an overestimate), in three South Asian countries, had been engaged in conducting interviews

3 Zachariah and anonymised colleague, conversation on a bridge in Zürich, Switzerland, 2014.

4 <https://calhum.org/1947-partition-archive-project-director-interview/> (24. 4. 2019).



with old people who were, seventy years after the event, close to dying, or so it was thought. What ensued was described by one former interviewer as a “grab-a-granny” (in Bengali, *didima-thakumader dhoro*) model, though she clarified that the guidelines they had been given were to be found on the website of the (US-based) Oral History Association – and added that these were not always suitable to follow in Indian conditions.<sup>5</sup> The interviews were to be handed over to the organisers of the project and housed at UC Berkeley (since then, the custodian of interviews has become Stanford University, reflecting a Bay Area dispute that will one day perhaps be relevant to the story); and a parallel project at Harvard, funded by a steel dynasty and coordinated by the Business School,<sup>6</sup> and the Bay Area project<sup>7</sup> traded a few charges about each having plagiarised the other’s (reasonably obvious) idea. Meanwhile, student “assistants” in the process of completing MAs or MPhils in history or related social science subjects, and some practicing professional academics, were persuaded to take on the job of conducting interviews; students were paid, which was an improvement on conditions of unemployment and living at home supported by parents; but they were underpaid and were soon frustrated. They were told they couldn’t use their own findings, which had to be handed over to the US institutions involved. Numbers and targets were handed out, in what might have been Stakhanovism or capitalist over-production, depending on contexts and circumstances.<sup>8</sup>

Such is the case of the industrial production of oral histories: to what end? Do we know? Does anyone know? It has become customary for some years to build “alternative” or private archives, again in the interests of “decentring” or “democratising” existing narratives, or to “represent” the unrepresented (Zachariah 2019: 149–162); and that seems to be what is happening in the case of partition. Partition interviews will have their place in this archiving process, a process that now also includes the Amritsar-based Partition Museum<sup>9</sup> – and we could also compare the oral history narratives of 1971 in the Bangladesh Liberation War Museum, whose protagonists have a longer time to live, we can assume.<sup>10</sup> Do we, however, have an alternative narrative of legitimacy building up from this? And do the narratives produced in these oral histories break the existing language of legitimacy down? Probably not: “I asked him if I could write down what he had said, he said, ‘Of course, write what you like. My life cannot get any worse.’ But my own feeling is that he wasn’t really aware of the kinds of implications this could have. So I did what I thought I had to: silenced those parts that needed to be kept silent” (Butalia 1998: 29).

5 <https://www.oralhistory.org/about/principles-and-practices-revised-2009/> (24. 4. 2019).

6 <https://mittalsouthasiainstitute.harvard.edu/oral-histories-project/> (24. 4. 2019).

7 <https://in.1947partitionarchive.org/> and <https://exhibits.stanford.edu/1947-partition> (24. 4. 2019).

8 Zachariah, interviews with several former students, whose anonymity must be respected: March–April 2019.

9 <http://www.partitionmuseum.org/about-us/> and <http://www.partitionmuseum.org/oral-history/> (24. 4. 2019).

10 <http://www.liberationwarmuseumbd.org/oral-history/> (20. 5. 2019).

There is the comparable case of holocaust survivor narratives (Bernard Donals, Glejzer 2000), often invoked by historians of partition, on which, it is often claimed, partition interviews ought to be based, though in the former case the victim-perpetrator categories are also externally clearer than they are in the case of partition, where oral histories have recorded the widespread intra-“community” violence of women being murdered by men lest they fall into the hands of other “communities”, whose actions would violate the honour of the community (rather than in the first instance be acts of violence against the women) (Menon, Bhasin 1998). “Truth” in a literal sense is subordinate here to the psychological truths that are supposed to be brought into being by creating an oral history interviews archive. On the other hand, we have had a few cases now of Holocaust survivor narratives that have been widely acclaimed for their authenticity, before being “outed” as fictionalised accounts and their authors widely reviled (e.g. Wilkormiski 1995; Defonseca 1997).<sup>11</sup> “Testimony” and “witnessing” are therefore things that require the authenticity of having been in the first-person position as *Zeitzeuge*, and no matter how well a fictionalised account fills this capacity, we do not regard it as fulfilling the same function (Preusser 2004). Why this should still be the case in a poststructural world, in oral history-writing where event-history is not sought after, and when so many memoirs or interviews are known to be products of self-censorship, selective remembering, transposed memory or deliberate lies in the sense of a conscious fabrication of what one knows or can be shown to have already known in another context, can perhaps only be explained by the superior legitimating capacity of “history” as opposed to “memory”. But it is the writing down of memories as history that produces that capacity.

## PLAGIARISM NARRATIVES FROM ACADEMIA

What, then, if the narratives that everyone knows cannot be written down? Perhaps there are reasons for which – like the act of censorship performed by the oral historian on behalf of her interviewee – it is safer, or more legitimate, or at any rate less delegitimizing *not* to write down what everyone in a given in-group knows. Since much oral history-writing relies on trusting the historian and her informants, perhaps a good example of oral testimony that is not written down and is therefore not history (and for that reason not legitimate?) is the plagiarism narrative. If you write it down, and especially if you try to attribute plagiarism to someone in particular, what happens then? At its worst, it becomes considered a personal score-settling, or complaining, which is never legitimate; this is especially the case when the one trying to record the instance is the plagiarisee. The truth-value of these statements often resolves into the question of the individual guilt or innocence of named people; but since these accounts are by definition not legitimate (they are seldom, if ever, written

11 <https://www.nytimes.com/2008/12/29/books/29hoax.html> (29. 4. 2019).

down, and if they are, they are seen as exceptions, which everyone within the profession knows is not the case), plagiarism as an endemic problem in academic life is not history; it is an open secret.

Here we might linger on whether such a thing as an 'open secret' deserves a place in a historian's "regime of truth", to borrow a Foucauldian phrase (Foucault 1980). Could we perhaps come up with indicative accounts, intending to highlight the systemic problems that beset an academic discipline, or perhaps all academic disciplines? There would be no attempt then to establish individual guilt; and indeed, *unless* one could do that according to a more rigorous *legal* regime of truth, "beyond a reasonable doubt" or "on balance of probability", it would be impossible to do so. Instead, the point would be to demonstrate that the nature of a self-sustaining system in which standards are set, judged and renewed by one's peers within a profession (and it might also be remembered here that a "profession" is based on professing an oath to uphold certain standards) is fatally compromised if those standards are abandoned. As for the individual tales, here again, the standards expected of oral testimony – that one knows first-hand what one narrates – would need to be the standard. According to conventions of "narrativity", as postulated by Hayden White (White 1980), there is no reason to take truth-claims in history seriously; they belong to what makes the genre. In that case, and especially in the hands of the self-confessed subjective and affective needs of the oral tradition (whether written down or not), the value of a plagiarism narrative might mainly be for an aggrieved party to "get it off her chest"; the claim might not be anything that can plausibly be intersubjectively established. Or it could indeed be that; and that might, in effect, be worse; because the plagiarist might take revenge on the plagiarisee, who is usually (though not always) the weaker party. And what if we did indeed make the narratives up? Or produce psychologically or sociologically analogous fictions that displace the actual details in order to make the generic point that there is a systemic problem in academia, but that we are not interested in the taking down of individuals?

Following are two accounts, the first, told in the first person, the second in the third. In both cases, a modicum of caution has been followed in order to make the general point and protect the identities of the persons concerned, until such time as, in the interests of a legal regime of truth, they can be brought into the open. The narrative voices differ in the interests of illustrating the different registers that are produced by first and third person accounts; it should not be taken to mean that the 'I' here refers to the current author; nor should it be taken not to mean that it does not. In a similar vein, pronouns might not refer to the actual genders of the persons concerned, nor initials their actual names. Or they might. "Oh yes, D----- stole your MPhil, didn't he?" I was greeted at a conference by this casual statement by a colleague; and I was taken aback, because I of course had not failed to notice this theft, but I did not believe that anyone else knew. I had not told a great many people, because I didn't think I'd have been believed: D----- was at the time a senior academic who had not been discredited by the effects of drink and gambling, and had had privileged

access to an unpublished piece of work (he'd been its examiner). But the colleague worked at the same university D----- then worked at, and (I had forgotten this) pointed out to me that she had asked me for a copy of the MPhil so that she could teach it in her course. Therefore, when D---- published his article with more than a few bits from my MPhil in it, his colleagues and students at the university knew where he'd got the bits from – they said nothing, of course, because this was the “open secret” model – “everyone knows” but “we don't talk about it”.

The second account is as follows. The historian B----- texted a colleague, O-----, after an article appeared with the exact same theme and extremely similar contents to a book O----- had recently published. She responded to B quite quickly: the article had come to her for review from an important journal, she'd reviewed it and suggested that it was not original (and she had said why it wasn't). It was duly rejected, then sent to another journal in another country by the author, S----, which journal also sent it to her to review. She had responded to them that she'd already rejected it for another journal, and told them the reasons. The second journal published the article, probably after it had been duly sent for peer review to other reviewers. But O----- didn't want to follow this up and make a plagiarism charge: S----- was an important professor in his own backyard (in a third country), and she might, she said, want to work in the country where he worked one day, in which case it was better to let it pass, and to rely on a public who, like B----, might have read O----'s original work, and would know that S----- had lifted O-----'s work but would, unlike B-----, but like everyone else, show sympathy to O----- and continue to let S----- pretend in public that he was an honourable historian.

The open secret would have to work in her favour; and if it did not, the plagiarist would have done no more damage than plagiarised a piece of work that – at least in this case – had already escaped into the public domain before the plagiarist realised that his plagiarism was too late. But an open secret works by being something no one really wants to talk about or to make an issue of: it might in some circles be the source of sympathy for someone seen as hard done by, but its existence is part of a larger power game that survives because no one talks about it *in legitimating or delegitimising terms* – and a cursory glance at the uses of this term for systematic study of a socially or historically relevant issue would create a list that includes the functioning of the secret services in Britain (Rimmington 2001), illegal detention and torture in Uganda (Human Rights Watch 2009), abortion in Burkina Faso (Rossier 2007), domestic violence in Ghana (Cantalupo et al. 2006), or literary fiction in which “nothing happens”, “where the term *open secret* refers to non-emphatic revelation – revelation without insistence and without rhetorical underscoring ... a gift that does not demand response but is there for the having, as readily taken up as it is set aside” (François 2008: xv–xvi), child sexual abuse in the Californian film industry, appropriately enough presented in a documentary film (Berg 2014), and the sexual torture of men in conflict situations (Oosterhoff et al. 2004). What happens when an “open secret” is written down, systematically studied, and thereby sought to be delegitimised?

It might be noted that the “open secret” model here relates to more than the question of plagiarism. A colleague noted that the best-known bibliography in his field lists only publications of authors in or from “western” universities (their own classification), which makes little sense as a principle of selection, given that the field of history he works in is concerned with an area with a rich and voluminous tradition of history-writing, albeit in a non-European language; and writing in that language only appears in the bibliography if it is produced by a scholar working in the “west”. The corollary to this is that the area that the writing cited in the bibliography is concerned with is written about from the “west”; scholars writing in that area are not cited, in the bibliography or by scholars who can read the language well enough to use it in their research – and yet not cite scholars working in that language from the region.<sup>12</sup> This asymmetry of citation – alongside the problem of communities of collusive citation – is often part of the oral communication among a scholarly community of researchers; and the open secret functions as (de)legitimator without being written down.

## NOTES IN LIEU OF CONCLUSIONS

Since in the last decades, historical accounts have been compared to fiction, and merely an attempt at realism in a literary sense rather than at recording reality in terms of *Wissenschaft* has been attributed to them, the once-felt need to hold the line between “hard” archival sources and “soft” oral testimony has weakened. After all, what are “archival” sources but (oral?) testimony written down in the past rather than in the present? And the power/knowledge critiques of archives as repositories of the records of domination, combined with attempts to create non-“elite” archives, could be said to be doing similar work to that which oral histories, in different communicative contexts, do.

The problem in all historical reconstruction remains, however, the question of verifiability, and the standards of that verifiability. In legal testimony, the role of eye-witnesses has long been crucial, but they are held to more rigorous standards of truth than are *Zeitzeugen*, contemporary witnesses, in the field of history – and the process is far more confrontational. In theory, of course, the oral history interview situation can be one in which interviewer and interviewee confront one another as across the barriers of the witness-box; but the communicative context can vanish quite easily if this begins to happen. And so it is that in order to keep harmonious communicative contexts functioning, difficult questions that border on interrogation do not get asked; unless of course either party is willing to discontinue the communication.

What is clear in written as well as oral testimonies is that there is a grammar of legitimacy that is not broken down unless one party is willing to challenge them.

---

<sup>12</sup> Zachariah, conversations with anonymised colleague, spring, 2019.

"In the case of both written and oral testimonies, in spite of the *prima facie* differences between them, it becomes clear that the distance between what has been witnessed and what can be committed to testimony – what was seen and what can be said – is often wide, but always palpable" (Bernard Donals, Glejzer 2000: 2). Nevertheless, oral testimonies are legitimised by being written down *as history*; this is something that has long been known, and even desired by the "democratisers". But as the oral historians of earlier generations were vulnerable to the charge that they were creating "feelgood histories" by bringing to the fore the "marginalised and unspoken" experiences of groups that had been hidden from history or under-represented more generally – in oral histories, histories "from below" and/or other democratising and decentralising impulses in historiographical production – it is time to prepare the counter-charge that the expansion in productions of oral histories and subjectivities can bolster ethnic, ethnocentric, exclusionary and divisive narratives, reifying "from below" what might well not be incompatible with exclusionary practices "from above".

The subjective and affective role of many oral histories might take us in the direction of reading them like psychoanalytic case histories: they are therapeutic accounts mediated by the therapist and purporting to record, with necessary redactions, the social and psychological predicament of the interviewee-patient-client (as terminology shifts in both professions). In this context, the faking of memoirs and the misremembering of memory are not too far away from each other. The question is whether oral historians wish to hold this line or not. Writing in a contextualising piece on the phenomenon of the fake Holocaust memoir, in which an author "feels" like a Holocaust survivor, even if this can be palpably shown to be factually wrong, Frank Furedi commented:

... it is important to realise that contemporary culture provides a powerful incentive to individuals to manipulate their memory and present themselves as traumatised victims. The assertion of trauma as a result of past suffering has become a way of winning public recognition and attention, and of making a claim on resources. Increasingly, the act of remembering has been turned into a public performance ... In the current cultural climate, it is inevitable that abuse memoirs have a tendency to stretch the boundary between fact and fiction. Readers and critics usually feel awkward and inhibited about questioning the veracity of such memoirs. Scepticism is discouraged in an era built upon the therapeutic ethos. "Believe the child", "Believe the patient", "Believe the abused" – today, such invocations are used to sacralise the claims of victims. (Furedi 2008)

It is all too easy, then, for an interviewer to be manipulated, not necessarily consciously, by an interviewee into accepting stories that might make psychological sense – perhaps in the manner of the recounting of collective memory, which is of course taught and not "remembered" first-person memory – and because the language of

legitimation allows the story to make sense, whether “true” or not. These are not hard lines; and it is hard to draw them at all without countervailing sources to check.

Perhaps the counter-example of that which functions without being written down needs to be looked at in more detail: why do we not write them down? Which ones do we choose to write down? Can one historicise the open secret? And in bringing to a wider “public” the internal “open secrets” of smaller groups – for whom the open secret, for good or ill, has been a *modus vivendi* that allows them to operate despite, parallel to, or behind, existing languages of legitimacy that would otherwise obstruct them, does the (oral) historian provide a worthwhile addition to matters of public consciousness?

## REFERENCES

- Abrams, Lynn (2010). *Oral History Theory*. London: Routledge.
- Anderson, Kathryn, Armitage, Susan, Jack, Dana, Wittner, Judith (1987). Beginning Where we are: Feminist Methodology in Oral History. *The Oral History Review* 15/1, 103–127.
- Berg, Amy J. (2014). *An Open Secret* [documentary film]. New York: DOC NYC festival.
- Bernard Donals, Michael, Glejzer, Richard (2000). Between Witness and Testimony: Survivor Narratives and the Shoah. *College Literature* 27/2, 1–20.
- Butalia, Urvashi (1998). *The Other Side of Silence: Voices from the Partition of India*. Delhi: Viking.
- Cantalupo, Nancy Chi, Vollendorf, Lisa, Kay Pak, Martin, Shin, Sue (2006). Domestic Violence in Ghana: The Open Secret. *Georgetown Journal of Gender and the Law* 7, 531–597.
- Defonseca, Misha (1997). *Misha: A Memoir of the Holocaust Years*. Gloucester, MA: Mt Ivy Press.
- Foucault, Michel (1980). Truth and Power. *Power/Knowledge: Selected Interviews and Other Writings 1972–1977* (ed. Colin Gordon). New York: Harvester, 109–133.
- François, Anne-Lise (2008). *Open Secrets: The Literature of Uncounted Experience* Stanford: Stanford University Press.
- Furedi, Frank (2008). ‘History-as-Therapy’, <https://www.spiked-online.com/2008/03/05/history-as-therapy/> (1. 5. 2019).
- Goody, Jack (1987). *The Interface Between the Written and the Oral*. Cambridge: Cambridge University Press.
- Halbwachs, Maurice (1992) [1925]. *On Collective Memory* (new edition). Chicago: Chicago University Press.
- Hobsbawm, Erick John, Ranger, Terence (eds.) (1983). *The Invention of Tradition*. Cambridge: Cambridge University Press.
- Human Rights Watch (2009). *Open Secret: Illegal Detention and Torture by the Joint Anti-Terrorism Task Force in Uganda*. New York etc: Human Rights Watch.

- Jessee, Erin (2011). The Limits of Oral History: Ethics and Methodology Amid Highly Politicized Research Settings. *Oral History Review* 38/2, 287–307.
- Khosla, Gopal Das (1949). *Stern Reckoning*. Delhi: Bhawnani.
- La Capra, Dominick (1999). Trauma, Absence, Loss. *Critical Inquiry* 25/4, 696–727.
- La Capra, Dominick (2001). *Writing History, Writing Trauma*. Baltimore: Johns Hopkins University Press.
- Ludden, David (ed.) (1996). *Making India Hindu: Religion, Community and the Politics of Democracy in India*. Delhi: Oxford University Press.
- Maclean, Kama, Zachariah, Benjamin (2019). Violence, Non-Violence, the State and the Nation: India, 1858–1958. *The Cambridge World History of Violence* (ed. Philip Dwyer). Cambridge: Cambridge University Press (forthcoming).
- Manto, Saadat Hasan (2014) [c. 1947]. *Mottled Dawn*. London: Penguin.
- Menon, Ritu, Bhasin, Kamala (1998). *Borders and Boundaries: Women in India's Partition*. New Delhi: Kali for Women.
- Moon, Penderel (1962). *Divide and Quit*. Berkeley: University of California Press.
- Niethammer, Lutz (2017), im Gespräch mit Veronika Settele und Paul Nolte. Oral History in der deutschen Zeitgeschichte. *Geschichte und Gesellschaft* 43, 110–145.
- Nora, Pierre (1992). Between Memory and History. *Les Lieux de Memoire, Representations* 26, 7–24.
- Oosterhoff, Pauline, Zwanikken, Prisca, Ketting, Evert (2004). Sexual Torture of Men in Croatia and Other Conflict Situations: An Open Secret. *Reproductive Health Matters* 12/23, 68–77.
- Perks, Robert, Thomson, Alistair (2015). *The Oral History Reader* (3<sup>rd</sup> edn). London: Routledge.
- Perks, Robert, Thomson, Alistair (eds.) (1998). *The Oral History Reader*. London: Routledge.
- Polishuk, Sandy (1998). Secrets, Lies, and Misremembering: The Perils of Oral History Interviewing. *Frontiers: A Journal of Women Studies* 19/3, 14–23.
- Portelli, Alessandro (1991). *The Death of Luigi Trastulli and Other Stories: Form and Meaning in Oral History*. Albany, N.Y.: State University of New York Press.
- Preusser, Heinz-Peter (2004). Erinnerung, Fiktion und Geschichte: Über die Transformation des Erlebten ins kulturelle Gedächtnis: Walser-Wilkomirski-Grass. *German Life and Letters* 57/4, 488–503.
- Raza, Rahi Masoom (1994) [1967]. *The Feuding Families of Village Gangauli [Adha Gaon]*. Delhi: Penguin.
- Rimmington, Stella (2001). *Open Secret: The Autobiography of the Former Director-General of MI5*. London: Hutchinson.
- Rossier, Clémentine (2007). Abortion: An Open Secret? Abortion and Social Network Involvement in Burkina Faso. *Reproductive Health Matters* 15/30: 230–238.
- Roy, Asim (1990). The High Politics of India's Partition: The Revisionist Perspective. *Modern Asian Studies* 24/2, 385–415.



- Roy, Sulagna (1999). Communal Conflict in Bengal, 1930–1947 (unpublished Phd dissertation). University of Cambridge.
- Sahni, Bhashini (2001) [1974]. *Tamas*. Delhi: Penguin.
- Samuel, Raphael (1994). *Theatres of Memory: Past and Present in Contemporary Culture*. London: Verso.
- Samuel, Raphael (1998). *Theatres of Memory, vol. 2: Island Stories: Unravelling Britain*. New York: Verso.
- Scott Brown, Sophie (2017). *The Histories of Raphael Samuel: A Portrait of a People's Historian*. Canberra: Australian National University Press.
- Sen, Dwaipayan (2012). Caste Politics and Partition in South Asian History. *History Compass* 1–12.
- Sidhwa, Bapsi (1988). *Ice Candy Man*. London: Daunt Books.
- Skinner, Quentin (1988). Language and Social Change. *Meaning and Context: Quentin Skinner and his Critics* (ed. James Tully). Princeton: Princeton University Press.
- Thompson, Edward Palmer (1963). *The Making of the English Working Class*. London: Gollancz.
- Thompson, Paul (2000) [1978]. *The Voice of the Past* (3<sup>rd</sup> edn). New York: Oxford University Press.
- Thompson, Paul, Bornat, Joanna (2017). *The Voice of the Past*, (4<sup>th</sup> edn). New York: Oxford University Press.
- Thomson, Alistair (2007). Four Paradigm Transformations in Oral History. *The Oral History Review* 34/1, 49–70.
- White, Hayden (1980). The Value of Narrativity in the Representation of Reality. *Critical Inquiry* 7/1, 5–27.
- Wilkomirski, Benjamin (1995). *Bruchstücke: Aus einer Kindheit 1939–1948*. Frankfurt a.M.: Jüdischer Verlag.
- Yow, Valerie (1995). Ethics and Interpersonal Relationships in Oral History Research. *The Oral History Review* 22/1, 51–66.
- Yow, Valerie (1997). “Do I like Them Too Much?”: Effects of the Oral History Interview on the Interviewer and Vice-Versa. *The Oral History Review* 24/1: 55–79.
- Yow, Valerie (2015). *Recorded Oral History: A Guide for the Humanities and Social Sciences* (3rd edn). Lanham, Maryland: Rowman and Littlefield.
- Zachariah, Benjamin (2004). *Nehru*. London: Routledge.
- Zachariah, Benjamin (2005). *Developing India: An Intellectual and Social History, c. 1930–1950*. Delhi: Oxford University Press.
- Zachariah, Benjamin (2019). *After the Last Post: The Lives of Indian Historiography*. Berlin: De Gruyter Oldenbourg.

## POVZETEK

### ALI JE JEZIK MOČNEJŠI OD TISKANE BESEDE? RAZMIŠLJANJA O PRODUKCIJI USTNIH ZGODOVIN IN JEZIKIH LEGITIMITETE

Benjamin ZACHARIAH

Težave z ustnimi zgodovinskimi viri izčrpno opisujejo tako privrženci te prakse kot njeni nasprotniki in skeptiki. Kljub temu pa se vsi strinjajo, da ustne zgodovine odpirajo področja, kamor druge zgodovinske metode ne sežejo, jezik je namreč v mnogih pogledih fleksibilnejši od svinčnika oziroma tiska. Toda kako se pogovarjati brez artikuliranega izražanja v jeziku, ki sta ga večča tako govorec kot poslušalec, spraševalec kot intervjuvanec? Kaj pa, kadar skupnega jezika sploh ni?

Članek v prvem delu prinaša nekaj razmišljanj o zadržanosti tradicionalnih zgodovinarjev v odnosu do ustnih zgodovinskih virov kot sredstva za obujanje dogodkov oziroma njihovega subjektivnega in čustvenega doživljanja, kakor tudi o njihovi zadržanosti do uporabe ustne zgodovine v komunikaciji, v kateri je vloga spraševalca pogosto podcenjena, čeprav bi potreba po samorefleksiji zahtevala prav nasprotno. Avtor navaja primere, v katerih ni ne jasno opredeljenega spraševalca ne intervjuvanca in v katerih intervjuvančeva doživetja niso zabeležena kot zgodba. Posledično se sprašuje o dometu ustnih zgodovinskih virov, kadar si komunikacija, v kateri nastajajo, prizadeva oživljati sicer nedostopne zgodbe in spomine, hkrati pa mora potekati v nekem skupnem jeziku, v katerem teh zgodb oziroma spominov ni mogoče jasno izraziti.

Avtor se je z navedeno tematiko začel resneje ukvarjati po vrsti debat, ki so sledile njegovemu nastopu v Ljubljani, kjer je govoril o možnostih in omejitvah ustnih zgodovinskih virov kot delu projekta z naslovom »Slovenske misijonarke v Indiji: Pozabljeno poglavje v medkulturnih odnosih«. Raziskava, ki se močno naslanja na ustne zgodovinske vire in – ker so prvotne pričevalke, razen ene, že pokojne – tudi na pričevanju druge generacije, je obravnavala življenjske zgodbe 12 slovenskih nun, ki so v 20. stoletju živele v Indiji. Težave z ubeseditvijo njihovih zgodb, ki jih obravnavajo tudi drugi članki v tej posebni številki revije, morajo vsekakor upoštevati dileme, ki jih poudarja pričujoči članek.

# A LIFE IN LETTERS: AN ANTHROPOLOGICAL REFLECTION ON THE CORRESPONDENCE OF SLOVENE MISSIONARY SR. CONRADINA RESNIK

Nataša ROGELJA CAF<sup>1</sup>

COBISS 1.01

## ABSTRACT

### *A Life in Letters: An Anthropological Reflection on the Correspondence of Slovene Missionary sr. Conradina Resnik*

This article follows a circular path. Its starting point is the well-preserved family archive of more than a hundred letters written by Sr. Conradina to her family back home in Slovenia from her assigned mission in India. It then journeys through layers of historical context important for understanding the qualitative methodological approaches, reflecting on various aspects relevant to the analysis of the letters (material aspects, questions of comprehension, content issues, the ethnographic context, etc.). Finally, it reaches – or rather comes back to – the source, the missionary herself, writing letters from India to Slovenia from within the framework of different hierarchies, discourses and relationships.

**KEY WORDS:** heritage of Slovene women missionaries, life writing, letters, India, women migration

## IZVLEČEK

### *Življenje v pismih: Antropološka refleksija korespondence slovenske misijonarke, sestre Konradine Resnik*

Članek je zasnovan krožno. Pot začne s predstavitvijo v obsežnem družinskem arhivu zbranih pisem, ki jih je slovenska misijonarka sr. Konradina v prvi polovici prejšnjega stoletja pošiljala svoji družini v Slovenijo. V nadaljevanju predstavi nekatere zgodovinske okoliščine, pomembne za razumevanje kvalitativnih metodoloških pristopov, ponudi pa tudi vpogled v različne plasti, pomembne pri analizi pisem (materialni aspekt, vprašanje obsega, vsebinska analiza, etnografski kontekst itd.). V zaključku se vrne na svoje izhodišče in osvetli akterko samo, slovensko misijonarko v Indiji, ki je v okviru različnih hierarhij, diskurzov in odnosov svojim domačim pošiljala pisma.

**KLJUČNE BESEDE:** dediščina slovenskih misijonark, življenjske zgodbe, pisma, Indija, ženske migracije

<sup>1</sup> PhD in Social Anthropology, Research Fellow, Slovenian Migration Institute ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; nataša.rogelja@zrc-sazu.si — The following article is part of the ARRS project “Slovene Women Missionaries in India: A Forgotten Chapter in Intercultural Relations” (2017–2020) led by Dr Ana Jelnicar and funded by the Slovenian Research Agency, and part of the ARRS programme “Heritage on the margins: New perspectives on heritage and identity within and beyond national” (P5-0408) led by Dr Špela Ledinek Lozej.

## INTRODUCTION

You know, Ivo, the willow trees are all beautifully green and they've already reached over a meter in height. I spend time looking at them every day. And I tell them they shouldn't be homesick, that I'm from the same place as them. (16 August 1986)

On 18 January 2018 I received an e-mail from the grandnephew of Sr. Conradina, one of the early Slovene women missionaries in India, who first set foot on the subcontinent on 23 November 1933. He wrote:

... I just spoke with my uncle Marjan and briefly described your project to him. We are both very happy that you remembered our "aunt from India", as we used to call her, and we are willing to cooperate as best we can. We will also contact our aunt Ivanka, with whom I have some connections. As I said, I myself keep her letters addressed to my father and grandmother (her sister), and to my great-grandmother (her mother) and to other family members. I believe that my uncle and aunt also have some of her letters ...

A few days later, when I met Sr. Conradina's grandnephew, I was presented with a large black folder full of yellowing pieces of paper, letters carefully arranged in chronological order, from the first dated 14 November 1933 to the last written on 20 June 1997. The last one was in fact sent by St. Elizabeth's Hospital in Bombay (now Mumbai), informing the family about Conradina's passing on 24 May, and the first was written (in Croatian) by the Croatian sister Marija Benedikta Banek from Liege, informing the family about her departure to India. All the letters and postcards in between were written by Sr. Conradina herself to her family, with the exception of one or two. I remember being quite impressed seeing the concrete textual evidence of Sr. Conradina's existence in India. First of all, the black folder was there, ready to be handed over to me. This in itself was amazing, knowing that traces of women missionaries are not easy to come by, as women missionaries did not leave many written materials behind. So, hypothetically, I was looking at material that had the potential to reveal an undiscovered history. Secondly, it was tempting to understand these letters as a true account of (her) conditions. And this feeling persisted regardless of the fact that researchers are (or should be) by nature discerning, detached observers, well aware of the numerous layers under the manifest surface (Gerber 2006). When holding the thick leather folder in my hand, observing the thin yellowing paper scribbled over in different yet similar handwriting, from the strong youthful hand to a trembling line – it felt like holding a life in my hands. And that in itself produced a pattern of reverence, significant also for the critical observation of history.

Chatting with Andrej Kotnik, Sr. Conradina's grandnephew, over the course of the next two hours, I learned about the basic course of her life, eager to get as much data as possible before plunging into the letters. Andrej was a willing and generous informant, who was extremely interested in this part of his family history. Himself

also a librarian, he had a passion for writing and researching, and was very articulate. He even prepared a short entry on Sr. Conradina for the local biographical lexicon<sup>1</sup> several years ago. Let me cite it in full as a starting point:

Ivana Resnik left her home in Markovo very early. As a young woman, she was an assistant doctor in Zagreb, where she gained considerable medical knowledge through practical work. In Zagreb she met Jesuit missionaries who had gone to India, and became enthusiastic about the missions. Following the advice of the Jesuits, in 1928 she travelled to Belgium with four other women and joined the order of the Daughters of the Cross. There she took the name of Sr. Conradina. For the next two years she studied at the monastic house in Liège and later did one additional year of studies in London. She returned to Liège in 1931 and took her first vows. On 9 November 1933 she embarked on a journey from Belgium to India, where she first worked at the Catholic Girls' School in Bandra (Bombay), teaching religion in the morning and helping with embroidering missal cloths in the afternoon. Twenty years later, she was transferred to a larger hospital in Bombay, run by her community. She worked there initially as a nurse, and as the head of nursing then until retirement. She was the only Slovene among the hospital staff. She maintained close contacts with her homeland and family. She returned to Slovenia for the first time in 1965 and for the last time in 1988. She is buried in Bombay.



*Konradina Resnik 1962*

Figure 1: Sr. Conradina Resnik (source: Kokalj 1989).

1 <http://www.leksikon.si/Oseba/Osebald/48>.

In the course of our first conversation, one anecdote caught my immediate attention. Once, when Sr. Conradina was visiting her family, her sister Ana, seeing Conradina go out and about a lot, made a remark, suggesting ever so cautiously that her sister should be praying a little more. Upon which, according to Andrej, the missionary swung her head and hand in dismissal, replying: "C'mon Ana!" Over time this small incident turned into a family anecdote, evoked at family gatherings. Alongside this nugget of family history, after our conversation, I was left with a distinct feeling of Conradina's almost painful attachment to her family and homeland, as well as her love of elephants, numerous wooden sculptures of which she would often send or bring to her family. I wanted to make sense of these. In this quest we will journey through layers of historical context important for understanding the qualitative methodological approaches, reflecting on various layers relevant to the analysis of correspondence.

## A FEW HISTORICAL, METHODOLOGICAL AND EPISTEMOLOGICAL CONSIDERATIONS

Before reflecting on the letters as a specific type of research material, let us briefly consider some of the historical contexts important for understanding the qualitative methodological approaches. Apart from the various labels attached to the so-called biographical approach and all heading in more or less the same post-modern direction – oral history, life history and life writing – what we are dealing here are also different scientific disciplines and their methodological, epistemological and theoretical developments over time.

Historian Alistair Thomson proposed four paradigmatic phases through which oral history evolved: the first is the post-WW II renaissance of memory as a source for history; the second phase relates to post-positivist approaches after 1970, the third dates to around 1980, and involves reflection on the role of the researcher, and the fourth is the digital revolution after 1990. Margaretta Jolly further reflected on these phases through three different fields related to researching "people's voices" (oral history, life history and life writing). These three categories are sometimes linked with specific disciplines (e.g. oral history with history) and/or with different theoretical traditions (e.g. life writings with postcolonial and postmodern theorists, recognising the heterogeneity of voices). They can also be seen in names of journals, conferences and institutes around which researchers with similar understandings and/or interests gathered. The boundaries between these fields, however, are not so clear as the descriptors themselves might suggest, and Jolly talks about them as family members, as siblings, cousins and aunts (2012: 47).

Although Thomson as a historian situated the beginning of contemporary oral history in the post-WW II period – in the period when (professional) historians recognised the validity of oral sources and when mobile tape-recorders began to be available – pinpointing the exact time of "the beginnings" is always negotiable. Jolly

writes about the “documentary movement” (2012: 48) which predated this period, going back to the early 20<sup>th</sup> century when British and American anthropologists, the Chicago School of Sociology and the British Mass Observation project (the latter recorded workers’ everyday life in Britain through diaries<sup>2</sup>) had already drawn on personal testimonies and acknowledged the importance of this material for academic knowledge. From its methodological beginnings with Bronislaw Malinowski, anthropology was also close to people’s (hi)stories, using conversation and participant observation as the main methodological approach, while studying culture from the perspective of a member of that culture.

In 1926 the American anthropologist Paul Radin published a book entitled *Crashing Thunder: The Autobiography of an American Indian*, a pioneering attempt of professional biographical study or a life history approach, which opened the door to numerous (auto)biographical studies in the following decades. The Chicago School represents another important beginning of the life history approach, focusing on migrant narratives through biographies written by migrants, building sympathy for the voices from below, for those who were marginalised. This trend clearly echoed the values of many of the first wave of oral historians (e.g. Thompson 1988), as observed by Jolly (2012: 49). Experiments from literature, especially by the modernists and the “new biography” approaches (e.g. Virginia Woolf, for more see Saunders 2010) that were strongly influenced by psychoanalysis, should also have their place in the “beginnings section”. As Jolly observed, all these experiments were part of the rebellion against nineteenth-century hagiography as well as psychological investigations fascinated with the nature of memory (ibid.).

According to Thompson, the approaches interested in subjectivity emerging in the second phase are also more similar to each other due to the fact that they have to enter into dialogue with various critics. These post-positivist approaches were articulated through various theoretical discussions, such as “symbolic interactionism” in sociology and “thick descriptions” in anthropology, leading towards numerous focused discussions on qualitative methodology (Denzin 1970). The third period coming after 1980 can be described as the most fruitful in terms of publications related to (auto)biography and qualitative methodology (Rogelja 2014) and is characterised by feminist political philosophy and preoccupations with the location and identity of both “biographer” and “biographee” (Jolly 2012: 50). In the late 1980s, various political testimonies (e.g. Holocaust testimonies) converged with the life story approaches and, from the context of trauma, challenged the limits of textual representations. Silences, unspoken words and gestures became equally important as the words spoken and heard in the qualitative approaches of the post-1980s.

The last period, as described by Thomson, is linked with the “digital revolution” where new information communication technologies transform the meaning of

---

2 In August 1939 the Mass Observation project invited members of the public to record and send in a day-to-day account of their lives in the form of a diary (see more Hall 2015).

proximity and intimacy across borders and distance (Madianou, Miller 2012), enable new transnational practices and connections (Bofulin 2018) and re-address (old) methodological and epistemological questions in a new light. Forms of self-representation such as Facebook posts, YouTube and blog posts gave hope of a return to orality, but instead, new oral-literate and visual-verbal-virtual forms were born (Smith, Watson 2009 in Jolly 2012: 56). Some authors, such as Michael Frisch (2006), stressed how new digital tools can restore some of the original impulses in oral history, by allowing for the inclusive sharing of memory and the heterogeneity of self-referential practices. This links with the postmodern and postcolonial theorists (Smith, Watson 2001) who have criticized the previous terms (e.g. life history and oral history) in favour of more inclusive ones, namely life writings or life narratives (Lambert Hurley 2013; Karlekar 1993).

Where do letters sit in this debate? Recently, I became a Facebook friend with Sr. Conradina's grandnephew, who occasionally posts photos, stories and other materials from his family archive online. One such "online family project" was his Facebook album "Famous relatives", a collection of photos and texts that elicited numerous comments. This specific material (also featuring Sr. Conradina's letters), opened new dimensions of (family) engagement and understanding through digital tools. Sr. Conradina's words had a special resonance in the context of Facebook as they spoke directly to the group members, linking them in a dialogue over obedience. Sr. Conradina writes: "Do not forget, Tone, if you are honest and obedient, you will you'll never be sorry". One of Andrej's friends commented: "Is obedience really a good thing?"

Letters speak directly and they are a specific kind of "raw material" rather than "synthesized memory" (Lambert Hurley 2013), both similar and different to diaries and journals. They differ from diaries in their diverse motivation (family letters, formal administrative letters, love letters, correspondence between writers and scientists, etc.), in their broader range of authorship (including invisible, common people) and in the distance involved with letters (time and space gaps between writing and reading, and between writer and reader). As such, collecting letters presents challenges for the researcher, as letters become scattered over the globe and the researcher rarely has access to both sides of the correspondence. Although this "one-way conversation" gives an impression of isolation, letters do not exist, and are not created, in a vacuum. Letters are not only expressions of the writer but are also part of the mutual dialogue (specifically, between the writer and the reader), depending on the circumstances and individuals involved. The style and the content of the writing is further influenced by education, gender, the political circumstances in which the letters were written, social class, and we could go on. As historian Steven Stowe wrote, personal writing reveals how people both embraced and resisted the time and place in which they lived (2002). The historical richness of texts such as letters can be found precisely in the friction between the general forms available to writers and the individuals' use of them for their own purpose (*ibid*).



Women missionaries' letters from the previous century can be put in the category of migrants' letters, the most widespread instrument of migrant communication during the 19<sup>th</sup> and most of the 20<sup>th</sup> centuries. Significantly more than newspapers and books, letters were a source of wisdom about life in a new location. They were the largest body of ordinary peoples' writings that researchers possess, and have become a recognised research resource in recent decades (Elliott, Gerber, Sinke 2006: 3; Kalc 2004: 153; Milharčič Hladnik 2009: 30–33). Following the fieldwork examples gathered for the project "Slovene Women Missionaries in India: A Forgotten Chapter in Intercultural Relations", letters can be considered as one of the main forms of self-expression for Slovene women missionaries and maybe one of the best sources to reflect on their agency (Jelnikar 2017). Similarly to what Lambert Hurley wrote about Muslim women writings (2013: 78), these missionary letters may be the key to reflect on questions such as: How do women's missionary writings differ from that of their missionary brothers in similar contexts? (see Motoh this volume) How do missionary women reflect on broader political and historical trends while also developing themes unique to their own experience? What was the core of the friction between the general forms available to Slovene women missionaries and the individuals' use of them for their own purpose? Let us first try and tackle the minutiae of missionary letters by trying to answer a simple question: How can letters be approached?

## LETTERS THROUGH LAYERS

### The Materiality of Letters

Steven Stowe wrote that personal texts from the past make an impression even before we see what they have to say (2002). The first layer of our analysis is thus the materiality of letters; assessing the various characteristics of letters as material objects and understanding information related to those characteristics. In other words, we have to take into account the information that exists beyond the epistolary narrative: the condition and texture of paper, the style of handwriting, the envelopes, the proportion of images, the way these "papers" were stored and by whom. All of this is information that can help with further analysis of the content. In the case of Sr. Conradina's letters, I first noticed the tidiness of the folder, the care that was invested in collecting and storing these letters, but also the family's willingness to share these fragile materials with researchers.

From the anthropological point of view, the present circumstances, the people who stored letters and talked about them, are very important for the analysis. Sr. Conradina's letters were collected by two of her nephews. I wondered – what if these letters had been written by some other family member, not by a missionary, would they have also been collected and stored in such a way? These letters, as suggested by Sr. Conradina's grandnephew in his Facebook album, are letters from

a famous relative. This also suggests the hope invested in the folder, that perhaps someday this object might even enter the public domain, hence the readiness to share what might otherwise have been seen as strictly personal letters. There was indeed a measure of pride in having a missionary in the family. This fact might attest to a more general phenomenon, following Ingie Hovland’s article on the Norwegian Mission Society (NMS), who noted that the image of the missionary as hero has deep roots (2009: 138). In the case of Sr. Conradina, this general positive image of a missionary can also be seen to be linked with more intimate, family affairs, and was used as a balm to soothe certain previous family wounds. These were mostly connected with the selling of family property back in 1903 due to the debt created by Sr. Conradina’s father.<sup>3</sup>

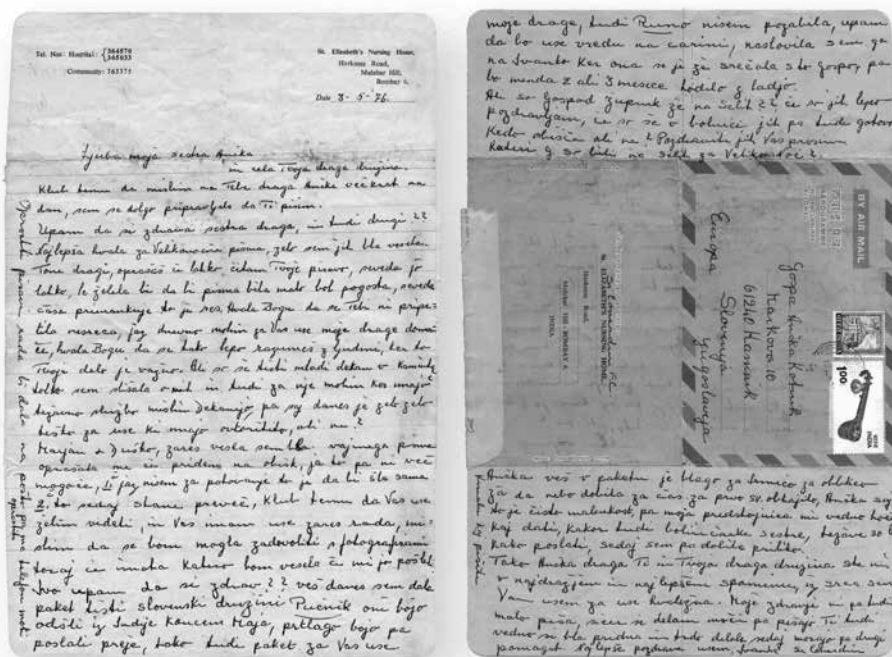


Figure 2: A letter (source: Resnik family archive).

There are several additional peculiarities regarding the material conditions of Sr. Conradina’s letters. Up till 1979, the letters were mostly written on the institution’s official stationery. Was she obliged to use the official stationery? Does this suggest that the pre-1979 letters were subjected to stricter control? Apart from the letters, the folder also contains one photo, one Christmas image and six postcards, mostly

3 From the author’s ethnographic documentation.

from around Christmas time. The postage stamps constitute another material detail. Apart from the images that they bear (airplanes, animals, workers, important men, moon with a man's face etc.), the stamps are also important objects. In several letters, the postage-stamps were removed and the handwriting is blurred due to the water used to remove the stamp. Were they removed for someone's stamp collection? The light blue envelopes with white, blue and red lines at the edges should also be taken into consideration. The grandnephew mentioned them several times in our conversation, as a specific object from his childhood. These special envelopes and postage stamps, different from the ones that circulated in Europe or Slovenia, found their way to the family post-box in the small village of Markovo, outside of Kamnik, and might have triggered curiosity or raised new questions about faraway places and the people who inhabited them. For anthropologists they also raised questions about the family who received and stored them.

### **The Question of Comprehension: Numbers and Gaps**

Numbers and gaps have to be taken into consideration before moving to the content. One way to approach the immense quantity of data is to create a list of facts in columns along the following lines: 1. Chronological perspective; 2. Persons involved (identification and quantification); 3. Gaps and silences. This structured picture allows for different connections and relations and raises new questions that might be asked in future ethnographic studies.

Chronologically it was important to see that this specific collection of letters started with a time gap. The first letter from 1933 came from Zagreb and was written by sister Maria Benedicta, who informed the Resnik family about Sr. Conradina's departure. The next letter in the folder came 14 years later and was written by Sr. Conradina to her mother in 1947, followed by another gap of 13 years. But from 1960 on, more letters were written, or at least more letters survived in the family archives and these became even more regular before and after her visits to Slovenia and around Christmas time. Most of the letters in the folder were sent in the early 1970s, peaking in 1973 (12 letters). It should be noted that this chronological framework corresponds to the changes implemented by the Second Vatican Council (SVC), which also included a loosening of the prescribed roles for missionaries and missions (see Avsenik Nabergoj in this volume). Furthermore, letters were written in relation to specific events in both the home country and India (e.g. the 1963 earthquake in Skopje; the 1971 visit of Yugoslav President Tito to Delhi) or in relation to important family events (e.g. the death of Sr. Conradina's mother and her brother-in-law; her nephew's graduation). Several kinds of time can therefore be said to have affected this correspondence: societal time (related to secular as well as religious political developments and specific events), environmental time (earthquakes, droughts, floods, seasons) and family time (illness, harvests, death, graduations).

Figure 3: Facts in columns

LETTER nu. & nu. of L. per Y	DATE/ PLACE (send from)	SENDER + letter details	RECEIVER	FIRST LINE	CONTENT	OTHER MENTIONED PERSONS
1. 1933 (1)	14/11 1933, Liege	S. Maria Benedikta Bažak (sister from Zagreb)	Франчишка Безик (mother)	Dearest Mad.	Encouraging words regarding C. departure to India. Details on departure.	
2. 1947 (1)	28/12 1947, St. J. Home, Бенголдс, Road Бучула, Bombay T: 41791	S. Con. (written on orig. paper St. Joseph, Home)	Франчишка Безик (mother)	My very dear mother!	Asking about illness of her mother. She feels guilty not being with her.	sister Bežka
3. 1960 (1)	14/2 1960, Bombay	S. Con.	Ana Kotnik (sister) address: Ivan &/or Ana Kotnik Markovo, 10, Kotnik, SL, SFRJ	My dearest sister Ančka!	Asking about nephews, worries about them, counts year in India, wishes more letters from family, mentions her visit home.	nephew Ivanka, Cardinal Stepinc, parish priest
4. 1961 (1)	12/11 1961, Bombay	S. Con.	Ana Kotnik (sister)	Dear sister!	Gives thanks for photos and letters. Wishes more letters. Worries about nephews (concrete Q regarding nephews)	Nephews: Ivanka, Tonček, Ivancik, Marian
5. 1962 (2)	8/9 1962 Daughter s of the Cross St. Jos. Con. Bandra- Bombay 50	S. Con.	Nephew Anton	Dear Tonček!	Congrats for school finish, advises about job, preaches on happiness. Mentions feast in Bandra.	
6.	2/9 1962, Bombay	S. Con	Ana Kotnik (sister)	My dear sister!	Counts y. in India, advises patience with Mimi, asks about Ivo school, advises contacts with priest and more prayers.	nephews Marian, Mimi, Ivo, Stanka + his family, parish priest

Regarding the persons involved, we can distinguish between addressees and those mentioned in letters. In our case most of the letters (46 of the total of 126) were addressed to Sr. Conradina's sister Ana. 27 letters were addressed to her nephew Tone and his family members. Her nephew Ivo received 24 letters, 17 letters were addressed to the family as a whole, and other members received 1 to 4 letters. Also interesting is the frequency of writing to certain family members. Tone received most of her letters in the period when he lived in the family house in Markovo.

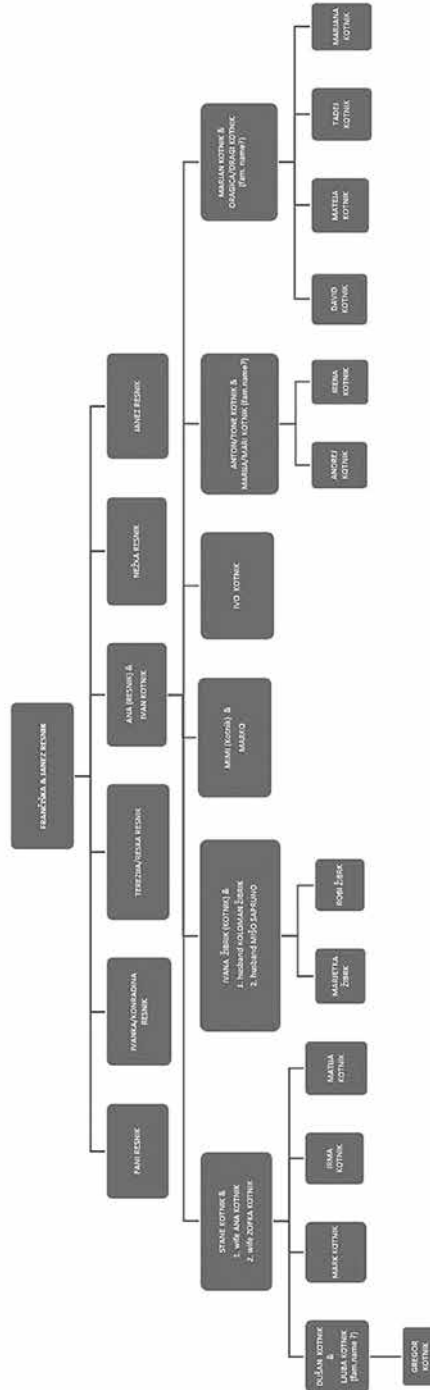
Afterwards, in the period between 1976 and 1988, it was her nephew Ivo who received most of her letters. These were letters addressed to her family house. Apart from the family members there were numerous other people who were mentioned in her letters. Some of these were: the local parish priests, a theologian from Ljubljana, Ursuline sisters, Bosnian workers (whom she calls “southern brothers”), neighbours and family friends from Slovenia. We also hear about her patients in India, other missionaries, Yugoslav politicians visiting India (there’s a mention of Tito), migrants from Bangladesh, a student from Maribor (whom she calls a communist), and so on. All these different people that found their way into her letters speak of the connections that were established between places, people and ideas. They testify to the fact that migrants’ letters were a source of wisdom about life in new locations and a means of connection across various boundaries.

The other day we went for a picnic and spent the whole day by the sea. It was nice, there was singing and joking for the entire journey. There were 4 sisters, 26 patients and 3 cooks. Everything here in India would be so much better if they hadn’t the wretched caste problem, with everyone going by their caste, and especially amongst the workers this is a big obstacle. And so the cook won’t clean the dishes, let alone scrub the kitchen. (19 March 1972)

Sr. Conradina emerges as a person with broad communication skills, not only regarding her linguistic abilities (she spoke English, French and Croatian, and maybe also some Hindi and Marathi) but also regarding her communication with people from different cultural and social milieus. Although her sister would not have had the chance to talk with the Yugoslav ambassador in India, or with Conradina’s Indian patients and their families, she was able to indirectly get to know all of them.

The gaps and silences call for further reflection; sometimes they simply speak for themselves. Is it possible that Sr. Conradina’s first letter to her family was sent 14 years after her departure? Wouldn’t she also have written home from Zagreb, where she worked as a medical assistant and where she first heard about missionary work in India? Were the letters from India deemed more precious and therefore worthy of keeping? What about her first 10 years in India? Is the absence of these letters simply the consequence of the restrictions that demanded strict separation between the missionary and her family? We can also never be sure how many letters were destroyed for various reasons, i.e. inadvertently or simply because they may have contained embarrassing content. Sr. Conradina’s experiences in Zagreb and her first years in India, the experiences that could reveal her aspirations and expectations regarding missionary life, remain a mystery. Another rather unexpected silence in her letters is a lack of information regarding India. Does it simply reveal her lack of interest in the local culture or did she assume that this kind of information would be uninteresting to her relatives, as her grandnephew has suggested?

Figure 4: Sr. Conradina's family tree



Author: Nataša Rogelja Caf

Finally, it is also important to acknowledge repetitive patterns. Repetition might serve as an entry point for content analysis or/and further ethnographic research. Although we did not use electronic coding approaches that might also be useful for letter analysis (such as ATLAS.ti and NVivo), certain themes appear, as odd as the frequent mentioning of home-grown pears and other fruits (mostly apples). In more than half the letters, Sr. Conradina implored her relatives to correspond with her using the exact same phrase: "Why don't you write to me more often?" Her constant longing for home found expression in different, often repeated, formulations: missing home, missing the family, loneliness, longing for the home country, homesickness, the joy of speaking and reading in Slovene.

### **Declaration of Contents: People, Events and the Plot**

We can now move to the next level, namely to the declaration of contents, including the characters, events, topics and the whole "plot of the story". In addition to the classical content analysis of data, genealogy research also proved useful for our purposes. Especially for understanding "characters", genealogy research, interlinked with ethnography, offers great potential for researchers seeking to understand the cultural and historical circumstances in which letters were written. A simple sketch of the family tree can be a solid entry point for clarifying the connections between the characters and the events mentioned in the letters. Sr. Conradina's family tree covers four generations and was created in two steps. First I created a simple graphic image with names. I then added different data and stories connected with specific people, linking the family tree with the stories gathered through ethnography and content analysis of the letters. Finally, I sketched some conclusions that were further tested within the research group. The three main clusters around which the letters are condensed can be described as: family, home country and (care) work.

The letter archive in question is primarily a family correspondence, and not so much a person-to-person correspondence, even though most of the letters were specifically addressed to one person. Often there were several letters inside one envelope. Apart from the economic aspect, this practice also underlines the notion of family correspondence; the letters were most probably written for everyone to read or to be shared. The most accentuated topic in her letters was the attachment to her home country and family. Often this gave rise to the expression of a tension between a longing for family on the one hand and a fondness for her profession on the other. Notwithstanding her attachment to her family, which lasted throughout her life, Sr. Conradina was very much devoted to her role as a nurse, especially after she started working at St. Elisabeth's Hospital in Bombay.

I wish my family was closer. I do not regret my decision but still I love my family so much... (21 February 1963) [...] By nature people are weak. My weakness is my

constant longing for family back home (27 July 1965). I have a lot of work but it is not too hard and I am really doing well. I get along very well with the other sisters, the nurses and doctors and of course with the patients. I help them to the best of my abilities and almost all my patients say they feel like they are at “home” and not in the hospital. Every day I speak with them, I ask them how they feel, if they like the food ... (25 April 1967)

Sr. Conradina constantly prays for her family, she thinks about her relatives in times of harvest, difficult situations (sickness, death, etc.), graduations and other important events. In other words, she remained deeply involved in family affairs, even though she lived thousands of miles away. She writes: “Mimi, did they start building the street? Does it pass by your house?” (31 December 1968) [...] “Is Stane’s room already finished? Where is it located? You know, I want to know everything, I remember all of you in my prayers every single day, especially you (sister Ana) and Stane (the oldest nephew)” (1963). “Are the apples already ripe?” (17 September 1974). Time is another important topic in her writings. In several letters she counts years spent away from her home, she often uses the phrase “how time flies”, and several times she brings up the idea of eternal time, the time when she will be re-joined with her family. “It’s been 38 years in India and 41 since I left home. Home and family are always first, after God (5 December 1971) [...] ... when we come to eternity, there will be no separation any longer and no tears” (3 March 1972).

In the letters we can also sense her constant struggling to remain part of the family, despite her having left it, and to maintain her position in it. She often gives advice to her nephews and nieces as well as to her sister. Most of the time, her advice is not a general sermon on life, though she can also be preachy, but more often than not it is mother-like concern directed at very concrete issues related to her nephews and nieces. Often she worries that she might be bombarding her family with letters and frequently she longs for their answers. “What happened? Why don’t you write to me? I find it very hard if you don’t write!” (22 May 1965).

Moving from family to broader issues of home country and language, one notices that food, books, trees and encounters with other Slovene or Yugoslav people hold a special place in her letters. Food is mentioned in relation to holidays, but specific items are also referred to, including, most frequently, dried pears and apples. Again this can be linked with her family history, as the pear tree near the family house was her mother’s favourite tree.<sup>4</sup> She also longs for pine trees, especially around Christmas time, and several times she mentioned willow trees that she brought from Slovenia and planted in India.

We can also learn from her writings that she regularly received Slovene books and journals (e.g. the Slovenian Catholic weekly *Družina* [Family] from Slovene priests and colleagues from Ljubljana. She often described encounters with Slovenes or

---

4 From the author’s ethnographic documentation.



other Yugoslavs abroad (Croatian sisters, Slovene students, Yugoslav ministers and consuls, Slovene immigrant societies and occasional guests) and she always wrote how good it was to speak in her own language (this also included Croatian, from where she was standing). Several times she tried to connect Slovenes abroad with her family back home (e.g. by suggesting letter exchanges with her nephews).

Even though family and home country are the focus of her writings, she does occasionally write about events in India, putting English or Indian words in her letters, and encouraging her nephews to learn foreign languages. On one occasion she explains about Buddhism and Hinduism and, especially from 1970 on, she sometimes describes people and broader societal problems in India. She often comments on politicians visiting India, especially Yugoslav ones, and though she is critical towards communism, she writes very positively about President Tito, stressing several times that he is someone striving for peace. Once she informed her family of she and a Croatian sister had sent a Christmas card to Tito. "You know Mimi, a Croatian sister and I wrote a Christmas card to Tito. I will tell you if we get a reply" (31 December 1968).

The "plot of her story" follows the development of the family events in Slovenia. Through her letters we learn more about her family and Slovenia than we do about India, although from the 1970s on we get more information about India, mostly regarding her professional work in the hospital as well as descriptions of encounters with other people in India. Still, these are bits and pieces, scattered across the story of her family. A short walk through her thoughts nicely outlines the plot of her story:

19 February 1960: Beloved mother, hearing about your illness I find it very hard not to be by your side. But this is impossible now ...

2 September 1962: How time flies! I can hardly believe it; it's been 32 years since I left home ...

1 June 1964: Did Ivanka find an apartment?

22 May 1965: What happened? Nobody writes to me!

8 June 1966: I hope your dad's arm is getting better ...

12 August 1971: I was thinking about you, how you dried and baled the hay, and I miss you all ...

10 March 1979: Just yesterday, I learned that Kardelj died. I hope Tito is healthy. God help him! ...

2 December 1979: You know Ančka, home and family as well as your homeland you can never forget ...

27 February 1983: When the primroses bloom, send me one in a letter from the home garden. Do you still have any snowdrops? I used to plant them a lot [...] Here in the hospital there is a lady. She is very weak and I feed her every day ...

13 March 1984: Dear Ivo! I would like to express my sincere sympathy on the occasion of your father's death ...

17 August 1986: I asked Ivo for willow branches, I planted them and they are growing ...

15 March 1987: Is it true that the Serbo-Croatian language will take over, I hope not [...] God save Slovenia ...

8 December 1988: (Ivo) take a bold step, find a woman and marry her ...

24 May 1989: You know Irena, a few days ago I saw a huge elephant kneeled down so people could descend ...

2 July 1993: I wrote you a long letter but maybe you will not be able to read it. I have poor eyesight and my hand is shaking ...

### Connecting Small Places with Large Issues:<sup>5</sup> Longing for Family, the “C’mon Ana!” Anecdote and ... Lots of Elephants

The combination of ethnography, family letters and memories all testify to what Shannon Perry (2012) has noted regarding personal or family stories and how they always complicate cultural stereotypes. They encourage the re-examination of taken-for-granted “truths” and they bring one face to face with stories and experiences that simultaneously do and do not belong to us. The “C’mon Ana!” anecdote tell us about Sr. Conradina herself, and it also speaks about her sister Ana’s expectations regarding missionaries and their way of life. Finally, it also speaks of us, who most probably find this anecdote amusing. We are asked to confront our own stereotypes regarding women missionaries and nuns, which can easily overshadow some important questions. The moment of reflection that includes the reader and the present context is exactly the contribution that anthropology can make in the analysis of letters.

“What was she like, honestly?” we found ourselves asking her grandnephew after reading and analysing the letters? “She was fond of life and cheerful,” he replies instantly, “in fact, she was an oddball, different to any of us.”<sup>6</sup> That is how he remembers her, that was her image in the family even before she left for India. He adds a story that triggered his memory in relation to our question. “Together with my granduncle Janez – from another family, so to say, and an outcast, who could not find himself in Markovo and sadly ended up as an alcoholic in the hospital for incurables in Mengeš – they once escaped to the local dance. It was a time of fasting and our family was very religious. But they still did it.”<sup>7</sup>

A lot can be said about agency on the basis of Sr. Conradina’s material. I don’t want to suggest that (Slovene) women missionaries were by definition “outcasts” or “activists” but, as stressed by Jelnikar (in this volume) it seems important to think

5 Borrowing the expression from anthropologist Thomas Hyland Eriksen (2001).

6 From the author’s ethnographic documentation.

7 See footnote 6.

about these women as active agents on the trajectory of change in the societies where they worked as missionaries as well as in their home societies, rather than as merely passive recipients of 'God's will' as dictated to them by their superiors. It is hardly surprising that the woman who embarked on a long journey to India one Tuesday night on 9 November 1933 is also the woman who escaped to the local dance and is remembered as jovial.

There is a notable tension between her religious and patriotic sentiments in her correspondence, leading towards the conclusion that missionary work, as Sr. Conradina lived it, was a specific personal juggling between a religious calling, patriotic sentiments and her personal aspirations. It is important to note that she came from a rural, religious environment of what later became communist Yugoslavia. On several occasions she wrote how she hated to travel, how difficult it was for her to travel alone, but also that she refused to join the Croatian sisters who in 1971 invited her to join them in Zagreb. She refused this offer despite the fact that this might have brought her closer to her family again. It was important for her to stay on in India. Could it then be that her missionary work provided an active resolution of a personal position in a specific local environment, where women were expected to be married and faith was in constant tension with state ideologies?

Finally, we have to give some space to the idea of the missionary as an agent of change in their home environment. Despite the fact that there are few words about India and other countries in her letters, Sr. Conradina did establish new connections, for example, through her English friend Peace who came to visit Markovo, by meeting Slovene and Croatian immigrants and other people whom she introduced to her family in letters or in person. Furthermore, she answered her nephews' questions about Buddhism, she encouraged them to learn new languages, she spoke about floods and migrations in India, she introduced them to her patients and their families. Finally, she also advised her family on various issues from her own unique position and was at the same time well aware of the stereotypes people held. She wrote once: "Ivan, you might say she knows nothing because of all these years she lived behind the cloister walls. But believe me, I have a lot of experience, working all these years with very different people, people with different problems" (29 July 1965).

Although one might draw the conclusion from her letters that she did not evince any great curiosity for the foreign country in which she lived for many decades (from 1933 till 1997), her input to the home environment was obvious. We once visited her niece Ivanka, a kind lady in her late seventies, the only relative to have once visited her in India. We felt like we should have come and talked to her a decade ago, when her memory would have been much more vivid. But looking around her house there were numerous colourful blankets and sculptures of elephants staring at us without any special explanations while we were having our conversation. They were like silent witnesses of the fact that Sr. Conradina, as well as the wooden Indian elephants, were an important part of this family.

After she passed away on 24 May 1997, the family received one final letter from India, written by Sr. Zita from St. Elisabeth's Hospital in Mumbai. Let us finish with her thoughts:

Her great love for her country and her language was evident in the keen interest she took in all the literature she received from Yugoslavia. In her not so lucid moments she often spoke in her language and it was a great pity that none of us were able to understand. Once in a while sister received visits from friends from Yugoslavia. Brother Ludwig, a Salesian brother, now living in Goa, was one of them. Sr. Conradina's face radiated with rare joy when she chatted away with brother in her own language. (25 May 1997)

## REFERENCES

- Bofulin, Martina (2018). O mlečni formuli in plenica: Prepletene mobilnosti predmetov in ljudi v kitajskih transnacionalnih družbenih prostorih. *Dve domovini / Two Homelands* 47, 147–162.
- Denzin, Norman (1960) (ed). *Sociological Methods: A Sourcebook*. Chicago, London: Aldine.
- Elliott, Bruce S., Gerber, David A., Sinke, Suzanne M. (2006). Introduction. *Letters Across Borders: The Epistolary Practices of International Migrants* (eds. Bruce S. Elliott, David A. Gerber, Suzanne M. Sinke). New York, Hampshire: Palgrave Macmillan, 1–25.
- Eriksen, Thomas Hylland (2001). *Small Places, Large Issues: An Introduction to Social and Cultural Anthropology*. London, Sterling Virginia: Pluto Press.
- Frisch, Michael (2006). Oral History and the Digital Revolution: Towards a Post-documentary Sensibility. *The Oral History Reader* (eds. Robert Peaks, Alistair Thomson). London: Routledge, 102–114.
- Gerber, David A. (2006). Epistolary Masquerades: Acts of Deceiving and Withholding in Immigrant Letters. *Letters across Borders: The Epistolary Practices of International Migrants* (eds. Bruce S. Elliott, David A. Gerber, Suzanne M. Sinke). New York, Hampshire: Palgrave Macmillan, 141–157.
- Hall, David (2015). *Worktown: The Astonishing Story of the Birth of Mass-Observation*. London: Weidenfeld & Nicolson.
- Hovland, Ingje (2009). Follow the Missionary: Connected and Disconnected Flows of Meaning in the Norwegian Mission Society. *Multi-sited Ethnography: Theory, Praxis, and Locality in Contemporary Social Research* (ed. Mark-Anthony Falzon). Farnham: Ashgate, 135–147.
- Jolly, Margaretta (2012). Memory, Narrative and History: Critical Debate, New Trajectories. *Working papers on Memory, Narrative and Histories* (ed. Graham Dawson). Brighton: Centre for Research in Memory, Narratives and Histories, 47.

- Kalc, Aleksej (2004). Pisma in magnetofonski trakovi kot komunikacijska sredstva in viri za preučevanje izseljenstva: Primer tržaške družine v Avstraliji. *Dve domovini / Two Homelands* 20, 153–174.
- Karlekar, Malavika (1993). *Voices from Within: Early Personal Narratives of Bengali Women*. Delhi: Oxford University Press.
- Kokalj, Jože (1989). *Pogovori ob Gangesu*. Knjižnica misijonskih obzorij 3. Ljubljana: Župnijski urad Dravlje.
- Lambert Hurley, Siobhan (2013). Life/History/Archive: Identifying Autobiographical Writing by Muslim Women in South Asia. *Journal of Women's History* 25/2, 61–84.
- Madianou, Mirca, Miller, Daniel (2012). *Migration and New Media: Transnational Families and Polymedia*. London: Routledge.
- 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). Založba ZRC: Ljubljana, 30–33.
- Perry, Shannon (2012). *The Other in Us: Anthropology, Genealogy and Kinship in the 21st Century*, <http://www.anthropologiesproject.org/2012/04/other-in-us-anthropology-genealogy-and.html> (20. 2. 2019).
- Radin, Paul (1926). *Crushing Thunder: The Autobiography of an American Indian*. New York: Appleton.
- Rogelja, Nataša (2014). »Vse po resnici«: Uporaba biografske metode ob raziskovanju Šavrink. *Dve domovini / Two Homelands* 40, 35–46.
- Saunders, Max (2010). *Self Impression: Life-Writing, Autobiografiction, and the Forms of Modern Literature*. Oxford: Oxford UP.
- Smith, Sidonie, Watson, Julie (2001). *Reading Autobiography: A Guide for Interpreting Life Narratives*. Minneapolis: University of Minnesota.
- Smith, Sidonie, Watson, Julie (2009). Subject Formations beyond the Book: Visual-Verbal-Virtual Contexts of Life Narrative. Keynote Lecture at the Work of Life-Writing International Conference, King's College London, May 26, 2009.
- Stowe, Steven (2002). Making Sense of Letters and Diaries. *History Matters: The U.S. Survey Course*, <http://historymatters.gmu.edu/mse/letters/> (22. 2. 2019).
- Thompson, Paul (1988). *The Voice of the Past: Oral History*. Oxford, New York: Oxford University Press.
- Thomson, Alistair (2007). Four Paradigm Transformations in Oral History. *Oral History Review* 34/1, 49–70.

## POVZETEK

### ŽIVLJENJE V PISMIH: ANTROPOLOŠKA REFLEKSIJA KORESPONDENCE SLOVENSKE MISIJONARKE, SESTRE KONRADINE RESNIK

Nataša ROGELJA CAF

Članek predstavi družinski arhiv pisem, ki jih je slovenska misijonarka, sestra Konradina Resnik, v prvi polovici prejšnjega stoletja pošiljala svoji družini v Slovenijo. Prvi del članka je namenjen orisu nekaterih zgodovinskih okoliščin, pomembnih za razumevanje kvalitativnih metodoloških pristopov, kamor se umešča tudi analiza pisem. Osrednji del članka na primeru pisemskega arhiva družine Resnik ponuja vpogled v različne, za analizo pisem pomembne plasti (materialni aspekt, vprašanje obsega, vsebinska analiza, etnografski kontekst itd.). Pisma so namreč med pomembnejšimi dokumenti za preučevanje dediščine ženskega misijonarskega dela, članek pa se s tem pridružuje redkim naporom konkretnih opisov metodoloških pristopov, ki v analizi pisemskega gradiva upoštevata tudi etnografijo. Čeprav je osrednji fokus članka metodološki, besedilo prinaša tudi veliko vsebinskih podatkov o sestri Konradini Resnik, njeni družini ter širši problematiki slovenskih misijonark v Indiji. Na temelju predstavljenih vsebinskih drobcov besedilo odpira številna za preučevanje slovenskih misijonark v Indiji pomembna vprašanja, kot npr.: kako se pri slovenskih misijonarkah odražajo širši političnozgodovinski konteksti, v katerih so se znašle (ali iz katerih so izšle), kako so se umeščale v različne hierarhije in razmerja moči in kako so v danih situacijah delovale same oz. kako so vplivale nanje. V zaključku se članek vrne na svoje izhodišče in osvetli akterko samo, slovensko misijonarko v Indiji, ki je v okviru različnih hierarhij, diskurzov in odnosov svojim domačim pošiljala pisma.

R A Z P R A V E I N Č L A N K I

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





# TRANSNATIONAL FAMILIES AND MIGRANT MASCULINITIES: THE SOCIAL INSTITUTION OF MALE ADULTHOOD AND FAMILY REUNIFICATION IN THE BANGLADESHI DIASPORA IN ITALY

Francesco DELLA PUPPA<sup>1</sup>

COBISS 1.01

## ABSTRACT

**Transnational Families and Migrant Masculinities: The Social Institution of Male Adulthood and Family Reunification in the Bangladeshi Diaspora in Italy**

This article is the result of a broader research project aimed at analysing the social construction of masculinity of Bangladeshi migrants to Italy. Specifically, the article focuses on the family reunification experience of Bangladeshi migrant men with their wives. Firstly, using some Bourdieusian perspectives, the article analyses the meanings of family reunification for migrants, how it constitutes a fundamental act of the institution of adult masculinity. Secondly, it investigates the meaning of this experience for the migrants' fathers and fathers-in-law in Bangladesh and how it can shape their masculinity according to their embedded *habitus* and social class position.

**KEY WORDS:** migrant masculinities, family reunification, Bangladeshi diaspora, Italy, transnationalism

## IZVLEČEK

**Transnacionalne družine in moškost migrantov: Socialni institut moške odraslosti in združevanje družin v bangladeški diaspori v Italiji**

Članek je rezultat obsežnejšega raziskovalnega projekta, katerega cilj je bila analiza družbenega konstrukta možatosti bangladeških migrantov v Italijo. Konkretno gre za izkušnjo združevanja družine na primeru migrantov iz Bangladeša in njihovih žena. Avtor v začetnem delu s pomočjo nekaterih bourdieujevskih konceptov analizira pomen združitve družine, ki je za migrante temeljni akt inštituta odrasle moškosti. V nadaljevanju proučuje pomen te izkušnje za očete in tiste migrantov, ki živijo v Bangladešu, kakor tudi njen vpliv na pojmovanje moškosti v skladu z njihovim privzgojenim *habitusom* in družbenim položajem.

**KLJUČNE BESEDE:** moškost migrantov, združitev družine, bangladeška diaspora, Italija, transnacionalnost

---

<sup>1</sup> PhD in Social Sciences, Assistant Professor, Department of Philosophy and Cultural Heritage, International Centre for Humanities and Social Change, Ca' Foscari University in Venice, Malcanton Marcorà, Dorsoduro 3484/D – 30123 Venice; francesco.dellapuppa@unive.it

## INTRODUCTION

The social construction of gender and the reconstruction of gender experiences of migrant men, especially when viewed in the context of intimate and family life, are research topics poorly studied in the sociological literature.

In the sociology of migration, the male migrant has been the primary subject of investigation for many years, but their gender identity has rarely been analysed. However, studies that have addressed migration from a gender point of view have mainly studied female migration (Anthias, Lazardis 2000; Morokvasic 1984).

At the same time, the growing number of contributions on men's studies that have helped launch new research areas and create a "new intellectual program" (Carrigan et al. 1985; Connell 1996; Hearn 2015; Kimmel et al. 2005) only rarely focus on migrants and, if they do, focus primarily on the working dimension (Batnitzky et al. 2009; Shereen et al., 2014; Donaldson et al. 2009), only superficially addressing other aspects of male experience such as family and private life (Bustamante, Alemàn 2007; Parreñas 2008). At the same time, research that focuses on family reunification (Bertolani et al. 2014; Kofman 2014) is quite rarely examined from a male point of view – even if recent works have also addressed male migration through a different epistemological approach as well as a gendered perspective (Batnitzky et al. 2009; Broughton 2008; Bustamante, Alemàn 2007; Della Puppa 2014; 2019b; Gallo and Scrinzi 2016; McKay 2007; Näre 2010; Parreñas 2008; Sarti 2010; Saucedo, Morales 2010; Scrinzi 2010).

Furthermore, studies that focus on the parental dimension of migration tend to give more space to the female perspective (Ambrosini 2014; Boccagni, Bonizzoni 2013; Milharčič Hladnik 2015). As Parreñas (2001) argues, the "pain of transnational parenthood" is a constituent element of migrant women's identities. Therefore, within the analysis of transnational families, migrant women have been observed as mothers, transnational carers and, at the same time, breadwinners for their family members. However, migrant fathers, despite the distance from their family contexts, have only rarely been identified for their transnational family experience and their role as distance carers. In this regard, some important contributions, framing male migration as an experience that redefines the identities of men and their relations with the families left behind, should be mentioned. Parreñas (2008), for example, by observing the family through an "emotional lens" and the intersections between genders and generations, analyses the suffering and embarrassment associated with the loss of confidence between fathers and children. She also analyses the "emotional gap" arising between generations divided by migration and how fathers and mothers manage distance care through various types of "frontering" (Bryceson, Vuorela 2002). In contrast, Bustamante and Alemàn (2007) point out that fathers succeed in preserving their intimacy with their children and overcoming their physical distance to an extent through transnational caring practices similar to those of migrant mothers.

Family life, in its intertwining with work life, is comprised of many experiences that contribute to the construction and redefinition of adult identity. These moments help to redefine the relations of subjects with themselves, with others and with the set of their life experiences, leading them to redefine their self-image and to activate new reflection processes.

The events that accompany and determine the path of the construction of the adult masculine life have been observed as *acts of institution* (Bourdieu 1982): social constructs that do not involve a mere passage of time (from childhood to adulthood, for example), where the one who undergoes the act of institution is separated from the one who still has to undergo it. These events represent a deeper *separation* between those who are or will be in a position to undergo them and the ones who will never and in no way undergo these events. Such acts of institution can also effectively intervene in reality, acting on its representations. Their symbolic consecration concretely transforms the consecrated persons: it transforms their image in the eyes of the others and, consequently, the way people act towards them; it transforms the self-perception of the “instituted person” and, therefore, the attitudes and behaviours that this person will feel and that they must have to adapt and modify themselves to this representation and in order to meet the new expectations of them (ibid.). In addition to this Bourdieusian framework, during the research I uncharacteristically used the dramaturgical metaphor (Goffman 1959) as an analytical tool. Italian and Bangladeshi societies, in fact, have been seen as the front stage and backstage of the same representation, depending in their mutual alternation on the placement of the speakers.

The research focused on the case of the Bangladeshi community living in Alte Ceccato, a suburb in the province of Vicenza (Italy). In this village, migrants represent a third of its 6,804 inhabitants and more than half of these were born in Bangladesh (Della Puppa 2015).

## METHODOLOGY

This paper is the result of a broader research project aimed at analysing the transformations of masculinity that take place in the institution of the adult lives of Bangladeshi migrants to Italy (Della Puppa 2014, 2015; Morad, Gombač 2015, 2018). The analysis focuses on a fundamental event in the migration experience: family reunification. This research is based on prolonged periods of participant observation in Italy (almost two years) and Bangladesh (three months) and the collection of 45 in-depth interviews at both poles of migration (Bangladesh and Italy). In Italy I interviewed 25 men who had been reunited with their wives and in Bangladesh 20 male family members of migrants previously interviewed in Italy. The migrants interviewed in Italy belong to the first generation of Bangladeshi migrants in Italy, and are almost entirely composed of urban middle- and upper-middle class men

or members of quite wealthy rural families, who arrived in Italy in the '90s (ibid.). The decision to interview only men was a specific methodological and theoretical choice. In other words, I tried to gather the experiences and representations of men and to read the gender dynamics as told by men, and to discuss how they represent themselves, their relationships with women and the gender relations within their family. I recognise that adopting this perspective could have limitations; however, this constitutes one of the many different angles from which to observe gender and gender dynamics, and it does not imply gender-blindness – no more than focusing only on women or only on migrant couples or, once again, only on the migrants' relatives would – and I remain sensitive to gender and generational dynamics in my ensuing analysis.

## THE FRONT STAGE OF A TRANSNATIONAL BACKSTAGE

The normative gender constructions that govern the relations between men and women in Bangladeshi society and the practice of arranged marriages force migrants and their wives to meet each other only after their marriage. However, it often happens that because of the job in Italy the newlyweds will meet and share their residence only after reunification. In fact, it should be underlined that, under Italian law (Law 189 of 2002), sufficient income and suitable housing must be available before families can be reunited. Pursuant to this law, the achievement of these is made possible by the labour and the income of the first-migrant applicant<sup>1</sup> (Della Puppa 2019a). So, from the perspective of Italian society, after having achieved the parameters established by law, the first-migrant applicant applies for reunification with what is identified as his family: having got married – often through an arranged marriage with a woman he met on his return to Bangladesh during his holidays – he and his wife formally constitute a family admitted for reunification. Therefore, what Italian society defines as “family reunification”, read through Goffman’s dramatic metaphor, represents the proscenium in Italy of a backstage determined in Bangladesh. That is, it is the result of a transnational process that allows the creation from the beginning of a nuclear family and its settlement in Italy. The administrative process that establishes the reunification conceals from Italy the matrimonial dynamics and the family planning of *probashi*<sup>2</sup> in Bangladesh (Della Puppa 2014).

- 
- 1 I use the term “applicant” (e.g. “applicant husband”) to identify the family member who brought his family members to Italy through family reunification, the term “reunited family member” (e.g. “reunited wife”) to identify those arrived in Italy, and the term “first migrant” to identify the family member who first migrated, opening the family “migration chain” (often coinciding with the applicant family member).
  - 2 Bangladesh expats are called *probashi*, which means “external inhabitants” or “the ones who went out”.

For many people, the reunification can almost be compared to the marriage. The reunifications implemented by the Bangladeshi migrants residing in Alte Ceccato are almost all reunifications completed by men who are beginning their married life and starting to construct intimacy with their wives within the context of immigration: "After the wedding, I stayed with her just thirteen days, too little to get to know each other, you know? Then, after nine months she came in Italy and slowly we got to know each other here" (Zoir).

## REUNIFICATION WITH THE WIFE, INSTITUTION AS A MAN

### In the Realignment of the Community

As family reunification is closely connected with socio-material parameters and, therefore, linked to the work and the efforts of the first-migrant applicant, it constitutes a tangible proof of the migratory, biographical and nuptial success, the proof of becoming an adult and a "moral" man, a thing that allows the migrant to separate himself from the family of origin. Conversely, those who do not carry out a reunification are subject to the censure of their countrymen and to the stigma of the "amoral deviant":

People told me: "It is good if you bring your family here." I was too late: all my old friends had already brought their families before me. I was married for eleven years, they arrived only six months ago. The other people married, and soon after, within two or three years, they brought [their wives]. [There was] nobody like me. [...] All the wives arrived, only my wife didn't. [...] Everyone brought his family, their family, I have to bring my family too. (Samad)

The reunification with the wife establishes a dividing line between a "before" and an "after" in the biography of the migrant man who completes it, and a line of demarcation between those who can perform their role as husband only in Bangladesh and those who can also do so in the *bidesh*.<sup>3</sup> In this act of institution, however, there is an even deeper and more invisible distinction between those who may have access to the *bidesh* as a "first migrant" and those who can have access to it only after the reunification, between those who have carried out a reunification and those who have been subjected to it. The institution, therefore, confers on individuals the typical social dynamics of the diaspora (Farahani 2012) and its reproduction through migratory

3 In Bangla it means "foreign land", foreign countries, as opposed to the Bangla-desh, "The country, the land where Bangla is spoken".

chains started by men; it separates men from women, according to the gender norms that characterize the migration from Bangladesh to Southern Europe.<sup>4</sup>

### Compared to the Society of Origin: the Father and the Father-in-Law

In Bangladesh, after having supported the marriage of a daughter with a *probashi*, the bride's parents – especially if they belong to the middle class – expect that the son-in-law will perform the family reunification, in order to free his wife from her subordinate relationships of patrilocality,<sup>5</sup> to share with her the living standards and the better opportunities provided by migration in Europe, and to show his (and their) male honour by protecting and controlling his wife.

Everyone asked my wife: "Why doesn't your husband take you to Italy?" They said that it was not right that we were separated. Because in her family other people went to *bidesh* and everyone brought their wife. Her sister-in-law, the wife of her brother, for example, said to her: "Your husband will bring you in Italy when the sun rises in the West." Get it? She said that I would only bring her when the sun goes the wrong direction. She meant: "He'll never bring you, don't believe your husband." (Sharif)

Sometimes, the institution of adult life through reunification symbolically takes place against the father's will. In fact, the transfer of the bride from the extended family in Bangladesh to the nuclear one in Italy may lead to a break with the father's influence on a symbolic and on a material level: on a symbolic level because the migrant becomes directly responsible for his family and his reunited wife, subtracting this power from the father; on a material level because the reunification may necessitate a reduction in remittances sent to the family of origin. But despite this symbolic conflict, sometimes it is the parents of *probashi* that hope for reunification. In fact this event, which makes it possible for the son who emigrated to become a man, also allows his father in Bangladesh to fulfil his family duties and complete a further life step.

The discussion about the patrilocal norm – that is present in Bangladesh, among educated middle-class girls – can push the father-in-law's family to oppose the reunification of the daughter in Italy, in order not to lose the power over her and in order not to have to give up the remittances it takes possession of through the daughter. Therefore, in this case the entrance into adulthood of *probashi* happens against the father-in-law's will.

4 In which the "first migrant", in almost all cases, is a man.

5 We must not forget that in Bangladesh, especially in rural areas, there is a relatively rigid patrilocal law that dictates that the new couple – or only the bride, if the groom is a *probashi* – go to live in the house of her husband's family, where the families of his brothers-in-law also live, and where the young bride will have to support all of the family members.

## REUNIFY THE WIFE, AND REUNIFY THE HUSBAND. MEANINGS OF AND MOTIVATIONS FOR REUNIFICATION

### “To Start Your Life”

Life before family reunification is represented as a preparatory phase, a “run-up to the jump into life”, or simply as a “non-life”. Therefore, the reunification effectively marks the beginning of a life that is worth living, a life surrounded by family: “Two parts, two separate people: this is not life. I’m married, I need to be with my wife, not always my wife in Bangladesh and I here. Now, when I’m with my wife, with my son, I hug him, I kiss him ... this is life! A life without love is nothing, zero. Before it wasn’t life, now it’s fine” (Samad).

Family reunification is represented as a goal that must be reached in the shortest possible time, without “wasting time”: in fact, any other approach would render the marriage meaningless, part of the efforts and sufferings of migration would become useless and, above all, the “beginning of life” as an adult man would be delayed.

### The Suffering of the Lonely “Probashi”

One of the main motivations for reunification is the migrants’ need to create and cultivate an emotional sphere in the immigration context, in order to break the loneliness of the diaspora. In fact, the first inclusion in the immigration context remains restricted to the working sphere. Reduced to mere workforce for the factories of the district, migrants miss the family routine, and feel the burden of their emotional loneliness and of the boredom that characterizes their “free” time:

My life before was different: I was alone. When your family is far from you, in another country and you’re here ... you can’t see them, you cannot speak with your wife ... it is not good for a human being. I was always lonely and unhappy, I had mental frustration. I was always wondering: “When she will come here? When she will come here?” [...] So many tensions in my mind. (Shantu)

In addition to filling the emotional void, reunification allows for a break in the sexual loneliness of “first migrants”,<sup>6</sup> the regaining of possession of the body and of the emotional sphere, and allows them to distance themselves from the reduction to mere workforce and the condition of “temporary guest worker”: “This is not life, the husband here, always working, sending money and doing so [mimes the act of male masturbation], and your wife is alone in Bangladesh! (Samad).

6 A dimension that sociology has scarcely studied with regard to “female migration”.

The desire to be reunited with the wife is also born from the needs of daily organization and the balance between work and family, from the push from adaptation to the experienced daily routine to an ideal model of family, economic and work organization: "For me, a family is a great thing. You come home from work and my wife has done everything at home. When I was alone, I had to clean the house and cook for myself, do everything. But now when I come home I see my son, my daughter, my wife has done everything at home. For me it is a new surprise every day" (Tariq).

With reunification the domestic sphere finally becomes a space in which relaxation and leisure time becomes a time of "unedited" normality in which migrants can enjoy recreation and relax, and they begin to feel "at home", even in Alte Ceccato.

### Between Enfranchisement and Precept

As noted above, since the patrilocal norm imposes the "migration" of the bride from her family to her husband's family after marriage, this norm puts the woman in a subordinate position with her in-laws. The risk that the wife of a *probashi* must submit to the other family members is greater because the husband, her only protection bond in a foreign environment, is absent. "In Bangladesh, my mother wanted to command my wife because the tradition says so. If my wife is there she has to cook, clean, work at home ... so many things. But here, my wife, who controls it? Nobody! She is happy here, not there. No one likes to be controlled." (Rana)

For the wives who remained in Bangladesh, in addition to the obligation of obedience to the father-in-law's family, there are also limitations on women's movement in public that strongly characterize the Bangladeshi reality. Especially in rural areas, women cannot freely move in public places unless they are accompanied by their husband or a male family member. In contexts where such a degree of autonomy may be more negotiated, for example in urban educated families, the freedom of the women may be blocked by a sense of insecurity that, especially in some late hours of the day, imposes a kind of informal curfew. "In Bangladesh, they have many obligations, their life is a bit 'blocked'. [...] Another problem is that in my country it is not safe for women to go out after eight in the evening. But here in Italy, if a woman goes out even at ten it's not a problem." (Zaeed)

The limitations on women's mobility can be reflected onto the children whose movements are tied to the mothers: if the left-behind wives have fewer opportunities to go out because their husbands are absent, their children will also suffer, and as a result, they face similar restrictions:

In Bangladesh, a father can easily go out with his son, the wife cannot. Here women can go out alone everywhere, it is normal, there not. Your wife cannot go out without you. [...] And also [for] your son there are problems because he always has to be at



home. [...] A son in Bangladesh can go out with his mother, but how often can his mother go out? Rarely. (Samad)

Family reunification, then, is perceived by the respondents as a duty towards their wife and children who remained at home: towards the wife because in this way she is no longer controlled and subordinated to the patrilocal norm; towards their children, because the husband's absence imposes on them a partial state of orphanhood and a limited ability to socialize.

I was talking with my son only always on the phone: "Hello, how are you? How are you Dad?" This is not normal, he did not know who was his dad. [...] My wife said to me: "Your son should grow up near you, with his daddy." For a son, it's not good to grow up without dad, he doesn't grow up normally. [...] A child needs two parents, a father and a mother; a single parent is not good! The child looks at the other dads, but his dad is not there, why? His mother, my wife, works at home, cooks, brings the child to school, reads books, teaches him to write a, b, c ... and I lose everything. She can't always do everything by herself! (Kobir)

Kobir's words reveal remorse for the time spent away from the family, for the separation from his wife to which whom the child's upbringing is entirely delegated, for the suffering inflicted on the child without the paternal reference, and for his own suffering as an immigrant father deprived of the moments that accompany the growth of the child (Abbatecola 2010; Bustamante, Alemàn 2007; Parreñas 2008).

Family reunification, however, can also be seen as an attempt at reassertion of male authority, if the husband comes from a poorer family than that of the wife. The husband's condition of *probashi* is an element of strength in the process of marriage arrangement and negotiation in order to fill the possible economic gap between the families of the aspiring couple. A definitive return to Bangladesh by the migrant would re-establish the initial gap and would force the husband to accept the symbolic and material subordination to the family of the in-laws. From the point of view of the husbands, then, the married life of the couple must unfold in a context in which the economic and power balance can remain unchanged for the benefit of the male component.

If my wife and I were in Bangladesh now everything would be different. Or she or me. In my country if the husband's family is economically weak and the wife's family is rich, the husband is always under the wife's family, and he is always a bit "weak". The man does not always decide everything. If the family of the woman is richer, the woman dominates. (Zaeed)

Thus, with family reunification Zaeed tries to preserve the patriarchy threatened by the economic domination of the father-in-law's family. In this representation, the

wife does not represent herself but her family, a presence from which the *probashi* himself has tried to break free.

The reunited wife, after living through the abrupt transition of the migration from her familial context to the father-in-law's family, has to deal with the trauma of migration to Italy. For women, the arrival in Alte Ceccato, may in fact lead to a profound destabilization: the migration involves multiple status changes and also sudden changes in social and family environment and life, causing pain and disorientation, loneliness and suffering: "When she came here, first two years she didn't want to stay here, she used to tell me: 'Send me to Bangladesh, send me back!' I was trying to let her understand: 'If I need money to live, I have to work here. So, if I work here and I live here, you will stay here.' So, little by little, she starts to understand" (Tanvir).

If upon reunification the house becomes the centre of the emotions for men, a privileged space where the migrant husband can enjoy and regain his family after work, for the reunited wives the boundaries of the house could become a golden cage and a place of suffocation and loneliness.

In contrast, in the country of origin, the wives spend their days in the relational context of the extended family of the absent husband. On the one hand, this may lead to subordination to the power of the mother-in-law, of other sisters-in-law and, more generally, of the other family members; on the other hand, however, the husband's family may provide the new bride with a dense network of relationships that is not segregated: in fact, there can be bonds of confidence and complicity between the women of the house. The strict hierarchy among members of her husband's family, the control and oppression to which the young daughter-in-law would be subject, can coexist and be reconciled with ties of solidarity, domestic warmth and family protection.

As a result of the broad extension that characterizes the family structure in Bangladesh (Gardner 1995), especially in rural areas, the wives left behind in Bangladesh, while respecting the precepts of *purdah*,<sup>7</sup> also have a chance to enjoy some close interpersonal and family ties. At the moment they are reunited, however, the desire to maintain the embedded rules governing their movements can make their social space coincide with the home space or limited portions of it. The vivacity of family ties and the family environment of origin gives way to the solitude of a yellowed room or a dilapidated apartment where the young brides find themselves living with an unknown husband or with one with whom there is no way and time to construct any intimacy. The same interviewees describe the suffering imposed on the wives

---

7 Literally "veil" or "curtain", it refers to a set of built-in practices that contribute to the construction of "modesty", "honour" and "shame", and preserves the separation, symbolic or material, of gender and spheres of gender activities through clothing, daily practices, the structuring of domestic environments, and physical segregation. To observe the requirements of *purdah* means to maintain the separation (more or less rigid) of domestic spaces along gender lines and observe the ban on access to public spaces in the absence of a male family member.

who, after being all alone during the day, can only have a few moments of the spouse's company when he comes back home exhausted after a long work shift:

In Bangladesh, she lives one type of life, but in Italy she has to live another type of life: the husband works all day, and when he comes back home at night or in the evening he's too tired, after dinner he goes to bed and the woman feels a little frustrated. Frustrated because her time is just passing: her husband works all day, in the evening he takes his food and goes to bed, while the woman is home all day; it is hard for her to pass the time until night when her husband comes home, perhaps they meet each other for one hour, then the husband goes to bed and the woman has nothing to do. (Zoir)

The realization of such an imposition on his wife makes Kazi doubt his wife's love, a love that might be maternal, but not conjugal. His dream of a nuclear family, a "modern" and happy family, pursued through reunification, crumbles under the blows of the compulsion that he acted out through the reunification. His strategy to put an end to his "personal tragedy" is to increase his patriarchal and male domination, that in this way becomes the cause of and (illusory) solution to his dissatisfaction as a man.

I like it here, I do not want to leave my children and my wife there. My heart does not feel good without them. I cannot live without them. Without the sun I cannot live like I cannot live without them. My wife yes. Because I have two things: children and wife. But she does not think of me, she just thinks about them. She has only them. She wants to go to Bangladesh and be there with them. But I do not. I want them here. [...] I want children and her with me. She does not want [this]. [...] But I decide. Because I'm in charge and when I'm in charge she says she's fine. She does not command me! I command her. (Kazi)

A huge hive-condo residential area marked by time does not in fact correspond to the ideal of modern and cosmopolitan Europe as described by the stories of migrants who return to Bangladesh, or as represented on the satellite TV channels that show the famous Brick Lane in London: the central artery and the heart of Tower Hamlets, the home of the largest *probashi* community in Europe. So the reunited wives must suffer the collective misconception of the migration truth (Sayad 1999) and, moreover, being originally educated daughters and daughters-in-laws of the Bangladeshi upper-middle class, they find themselves as wives of unskilled workers, placed at the lowest level of civic and social stratification.

## REUNIFICATION AS SEEN FROM BACKSTAGE

### Shame and Humiliation for some Men ...

Some relatives of the migrants interviewed in Bangladesh report that the *probashi* condition can cause greater difficulties in finding a bride in the country of origin:

When someone comes from abroad and wants to marry someone here it becomes problematic, because the perceptions of *probashi* are not always favourable. Take for example the “guardian” of a daughter: he might think that his would-be son-in-law is doing a not respectable job: cleaning the streets, working in a hotel, working in a factory, as a carpenter, hard jobs, laborious, not so well-paid, and considered socially humiliating. Because socially it could be humiliating for someone for his daughter to marry someone who does these kinds of jobs. (Shafiq, brother)<sup>8</sup>

For Bangladeshi upper-middle class families, and especially for their male members, to allow a daughter to marry a worker or a labourer would be a humiliation and a disgrace. To be an unskilled wage worker, even in a factory in Europe, can in fact be considered a degrading condition in the eyes of high-status Bangladeshi families of the candidate brides. At the same time, *probashi* do not always manage to soften (or hide) from their country their real status in the *bidesh*.

Ali, the owner of a prestigious restaurant chain and a famous cafe in Dhaka, declined to face what is probably perceived as a humiliation to him: in spite of initially agreeing, he did not want to be interviewed about the reunification in Italy of his sister, who married Zaeed, a metalworker in Alte Ceccato, repeatedly refusing to answer the phone on subsequent occasions.

It is conceivable that the *probashi* has managed to create an idealized representation of his situation in Italy at the time of the marriage negotiation, and managed to marry a woman of superior status. Ali did not want to be interviewed about these issues, trying to avoid an event he considered as humiliating with the researcher. The researcher, having crossed the border between the front stage and the backstage of migration and reunification, would have been aware of Zaeed’s situation in Italy, and also of the status in Bangladesh of the family of origin of the woman married to the *probashi*.

Khan, the father-in-law of a man who emigrated to Italy, considers the marriage of his daughter humiliating and says that he reluctantly agreed to it in order to please his daughter, but he opposed reunification, trying in this way to limit the dishonour. Also the remittances sent to his daughter – living in her father’s house – are perceived as a continuous recurrence of such humiliation:

<sup>8</sup> In the interviews, kinship relationships relate to the migrant residing in Italy.

My son-in-law is living in Italy, but I was reluctant about my daughter's marriage. There was a large number of candidates: a government employee, a doctor, and someone else with a similar status, but my daughter didn't choose them, so I had to get her married to that person that has been working in Italy. [...] I let my daughter go abroad only for her studies, not for any other reason! [...] Of course my son-in-law used to take care of my daughter and so far I know he used to send money to my daughter, but I don't want to intervene in their family life, they're living their life and I am not in need of their money and I don't even want to know how much money is coming from Italy: I don't exactly know and I don't want to know. It is one of my irritations. (Khan, father-in-law)

Khan, who opposes the reunification of his daughter and his son-in-law, reiterates the role of the guardian authority of the family and depicts a clash between patriarchates from which he emerges as the winner. Despite the fact that he defines the division of his daughter's family as a cause of suffering, the possibility of reunification in the *bidesh* is no way contemplated:

I love my grandchild very much and nothing in the world right now is more dear to me than my grandchild. I love him very much, very, very much; he's now an inseparable part of my life. But I simply don't like that my son-in-law is staying in Italy: I want my daughter and my son-in-law to be united, but practically now it is not possible, it's a matter of grievance for me. (Khan, father-in-law)

### ... Honour, Success and Prestige for Others

For other men, however, the condition of successful migrants (and, therefore, of potential reunification of candidate husbands) has been the key element of the marriage. Rahaman, for example, had always proposed the marriage of his daughter to a *probashi*. The interviewee does not see possibilities for the future of the new generations belonging to lower-middle class families – like his – in Bangladesh, and believes that only emigration can guarantee them better opportunities. For his daughter, however, the only socially legitimate way to implement this project is to marry a migrant and be reunited.

I have always wanted to let my daughter marry someone who lives abroad, because the prevailing conditions in our country are bad and – I think – will be worse within a short period, so for the future of my offspring, I decided to give my daughter to a *probashi*. [...] The fact that he was in Italy was – of course – a positive point, a plus. It prompted us to push our daughter to marry him. (Rahaman, father-in-law)

The realization of what is perceived as a particularly advantageous marriage (and makes the emigration to Europe possible) confers honour and prestige on the representative – “the guardian” – of the bride’s family. Through his daughter’s marriage and her stabilization in Europe, Rahaman feels that he has completed his parental obligations, and that he has completely fulfilled his patriarchal duties and therefore has actualized himself as a father and a man.

The sacrifice of two generations (his own and his daughter’s), consisting of the wound of emigration and the suffering of family separation, would be justified by the realization of future generations that through their successes in the *bidesh* the prestige of the family and its representatives will be immortalized, along the chosen male line.

In Europe or in America you could find some sort of assurance of living conditions. When someone is living in Italy or somewhere in Europe, the next generation will get some more opportunities to get a good education and to be a citizen of that country, so these were the things on my mind when I thought to marry my daughter to someone living there. (Rahaman, father-in-law)

For those that an interviewee defines as “middle-class educated families”, the mere presence of the son-in-law abroad and the economic benefits of the remittances do not constitute sufficient conditions to justify a marriage of this kind. To marry a migrant, in fact, is not a “convenient” union by virtue of its immediate economic benefits (remittances), but because of the most optimistic possibilities of life that it would offer to the reunited wife and the future generations.

The separation of husband and wife would prevent their living as a whole family and the individual realization of the bride, who would remain at home despite being married to a man abroad, and who would go to stay in the house of her husband’s family where she would risk being placed in a position of subordination, vulnerability and loneliness. The remittances, aimed partly at supporting his wife and children, could be managed in their entirety by her husband’s family. If not followed by family reunification, therefore, marriage to a migrant can be transformed from a symbol of success and prestige to a stigma of failure for the whole family and, above all, for the head of the family that represents it and is responsible for it. “It was only when I realized that my son-in-law intended to bring my daughter along with him that I didn’t object to the marriage” (Rahaman, father-in-law).

Because – in Bangladesh, but also in other nations – the position of each member of the family in the marriage market depends on the marriages of all the others, the favourable marriage of the eldest daughter could result in an improved position in the marriage market of the second daughter, who will then have more possibilities for a favourable marriage, thereby maximizing Rahaman’s realization as a man.

While for upper-middle class men who come from prestigious families the marriage of a daughter or a sister to a migrant can be a form of social devaluation,

for middle-class men who, even though they have sufficient capital, cannot boast membership in a clan of noble origins, a marriage of this kind can be an opportunity for upward social mobility (Gardner 1995) and, therefore, for an increase of male honour. For Rahaman, however, when this objective finally appeared to have been achieved, his hopes of a bright future for his daughter were frustrated by the effects of the economic crisis:

But immediately after the marriage of my daughter I found that in Italy the situation is not going so well. My son-in-law has been staying in Italy for more than ten years and just in 2008 things began change rapidly, and now they find that is tough to stay in Italy with the family. Socially our condition is very ridiculous, because our relatives, friends, neighbours and everyone think that since my son-in-law lives in Italy he must be of great help to my family, all of them think that he sends remittances on regular basis and when I talk to them then I also recognize this [as a] fact; I say that and I act as if my son-in-law is a great help for us. I used to confirm this, because socially it would be a problem if I said things in another way. So I used to tell another truth, I used to tell the opposite from what the reality is. So socially I should say I need to say the opposite from what is actually happening. (Rahaman, father-in-law)

Therefore, the decrease in real job opportunities in Italy and the impossibility of a real improvement in the lives of emigrated relatives caused by the recession aggravated the suffering of migration. For Rahaman, the staging in Bangladesh of different representations compared to the stories provided by the daughter in Italy becomes an extreme form of resistance to the loss of meaning of a life spent away from the family, but, above all, a strategy to avoid compromising the male honour and the family respectability gained through a marriage that was still favourable in the eyes of the community, and not to lose the social currency that is useful to the marriage prospects of his still-marriageable younger daughter.

## CONCLUSIONS

The experience of building a nuclear family in the diaspora through the process of family reunification is configured as a real act of the institution of adulthood (Bourdieu 1982) through which *probashi* become men in the eyes of communities of their compatriots in Italy and in the comparison – even if conflicting – with the father and the father-in-law (the status of male relatives is also increased by the experience of the migrant) in Bangladesh.

By intertwining the representations – constructed “with male voices” – about the dynamics and hierarchies that characterize the organization of the family in Bangladesh with those relating to the condition of reunified wives in Alte Ceccato, it has been possible to elicit the ambivalence of reunification and the often contradictory

experiences that accompany it. This event represents an opportunity through which the *probashi* can realize his emotional and family dimension in migration, but also a duty that he feels he must fulfil towards his wife in order to free her from the patriarchal power of the extended family, and finally also a form of symbolic violence by him on the reunited wife – a component of masculine domination from which he is unable to free himself (Bourdieu 1998). At the same time, if observed from the perspective of the migrants' country of origin, the reunification through the migration of their wives can be a family wound full of suffering – the result of a patriarchal strategy aimed at increasing the honour of the women's families, and especially, of their representatives, and on the contrary, a potential source of humiliation and dishonour for them due to the class position and the *habitus* of the social actors. So the class position, transnational strategies and social constructions of masculinity intersect each other (Christensen, Sune Qvotrup 2014; Farahani 2012; Hearn et al. 2013), leading to the creation of profiles of men who are sometimes locked into the dominant representation that forces them into the differentiation of the social forms of gender construction; they are *dominated by their own dominion*, rather than by the desire to dominate. The construction of representations within rigid gender boundaries, in fact, does not structure only the dominated, but also the dominators, and is also subject to a control device that regulates their expression. Honour – warns Bourdieu (1998) – *governs* the honourable man: he cannot obey this imperative without denying himself.

## REFERENCES

- Ambrosini, Maurizio (2014). Parenting from a Distance and Processes of Family Reunification: A Research on the Italian Case. *Ethnicities* 8, 1–20. DOI: 10.1177/1468796814547059.
- Anthias, Floya, Lazardis, Gabriella (2009). *Gender and Migration in Southern Europe*. Oxford: Berg.
- Batnitzky, Adina, McDowell, Lybda, Dyer, Sarah (2009). Flexible and Strategic Masculinities: The Working Lives and Gendered Identities of Male Migrants in London. *Journal of Ethnic and Migration Studies* 8/35, 1275–1293. DOI: 10.1080/13691830903123088.
- Bertolani, Barbara, Rinaldini, Matteo, Tognetti Bordogna, Mara (2014). Combining Civic Stratification and Transnational Approaches for Reunited Families: The Case of Moroccans, Indians and Pakistanis in Reggio Emilia. *Journal of Ethnic and Migration Studies* 9/40, 1470–1487. DOI: 10.1080/1369183X.2013.868302.
- Boccagni, Paolo, Bonizzoni, Paola (2013). Care and Circulation Revisited: A Conceptual Map of Diversity in Transnational Parenting. *Transnational Families, Migration and the Circulation of Care* (eds. Loretta Baldassar, Laura Merla), 78–94. Adergate: Routledge.



- Bonizzoni, Paola (2012). Civic Stratification, Stratified Reproduction and Family Solidarity: Strategies of Latino Families in Milan. *Gender, Generations and the Family in International Migration* (eds. Albert Kraller, Martin Kohli, Camille Schmolli), 311–335. Amsterdam: Amsterdam University Press.
- Bourdieu, Pierre (1982). Les rites comme actes d'institution. *Actes de la recherche en sciences sociales* 43, 58–63.
- Bourdieu, Pierre (1998). *La domination masculine*. Paris: Le Seuil.
- Broughton, Chad (2008). Migration as Engendered Practice: Mexican Men, Masculinity, and Northward Migration. *Gender and Society* 22/5, 568–589. DOI: 10.1177/0891243208321275.
- Bryceson, Deborah, Vuorela, Ulla (2002). *The Transnational Family: New European Frontiers and Global Networks*. Oxford: Berg.
- Bustamante, Juan José, Alemàn, Carlos (2007). Perpetuating Split-household Families: The Case of Mexican Sojourners in Mid-Michigan and their Transnational Fatherhood Practices. *Migraciones Internacionales* 1/4, 65–86. DOI:10.1068/a44128.
- Carrigan, Tim, Connell, Bob, Lee, John (1985). Toward a New Sociology of Masculinity. *Theory and Society* 14, 551–604. DOI: 10.1007/BF00160017.
- Christensen, Ann-Dorte, Sune Qvotrup, Jensen (2014). Combining Hegemonic Masculinity and Intersectionality. *Norma: Nordic Journal for Masculinity Studies* 9/1, 60–75. DOI: 10.1080/18902138.2014.892289.
- Connell, Raewyn (1995). *Masculinities*. Cambridge: Polity Press.
- Della Puppa, Francesco (2014). *Uomini in movimento: Il lavoro della maschilità fra Bangladesh e Italia*. Torino: Rosenberg and Sellier.
- Della Puppa, Francesco (2015). *Home Between bidesh and shodesh: Domestication of Living Spaces, Identity and Gender Experiences in the Bangladeshi Diaspora. Dve Domovini / Two Homelands* 42/2, 97–111.
- Della Puppa, Francesco (2019a). *Bodies at Work, Work on Bodies: Migrant Bodies, Wage Labour, and Family Reunification in Italy*. *Journal of International Migration and Integration*. DOI: <https://doi.org/10.1007/s12134-018-00644-x>
- Della Puppa, Francesco (2019b). *A Redeemed Biography? Migration as an Intra-family Redemption Device*. *Rassegna Italiana di Sociologia* 1 (forthcoming).
- Donaldson, Mike, Hibbins, Raymond, Howson, Richard, Pease, Bob (2009). *Migrant Men: Critical Studies of Masculinities and the Migration Experience*. Aldergate: Routledge.
- Farahani, Fataneh (2012). Diasporic Masculinities: Reflections on Gendered, Raced and Classed Displacements. *Nordic Journal of Migration research* 2/2, 159–166. DOI: 10.2478/v10202-011-0038-5.
- Gallo, Ester, Scrinzi, Francesca (2016). *Migrant Men, Masculinities and Reproductive Labour: Men of the Home*. Basingstoke: Palgrave.
- Gardner, Katy (1995). *Global Migrants, Local Lives: Migration and Transformation in Rural Bangladesh*. Oxford: Oxford University Press.

- Goffman, Ervin (1959). *The Presentation of Self in Everyday Life*. New York: Anchor Books.
- Hearn, Jeff (2015). *Men of the World: Genders, Globalizations, Transnational Times*. London: Sage.
- Hearn, Jeff, Blagojevic, Marina, Harrison, Katherine (2013). *Rethinking Transnational Men: Beyond, Between and Within Nations*. Aldergate: Routledge.
- Kimmel, Michael, Hearn, Jeff, Connell, Raewyn (2005). *Handbook of Studies on Men and Masculinities*. Oaks: Sage.
- Kofman, Eleonore (2004). Family-Related Migration: A Critical Review of European Studies. *Journal of Ethnic and Migration Studies* 30/2, 243–262. DOI: 10.1080/1369183042000200687.
- McKay, Strven C. (2007). Filipino Sea Men: Constructing Masculinities in an Ethnic Labour Niche. *Journal of Ethnic and Migration Studies* 33/4, 617–633.
- Milharčič Hladnik, Mirjam (2015). *From Slovenia to Egypt: Aleksandrinke's Trans-Mediterranean Domestic Workers' Migration and National Imagination*. Göttingen: V&R.
- Morad, Mohammad, Gombač, Jure (2015). Transmigrants, Transnational Linkages and Ways of Belonging: The Case of Bangladeshi Migrants in Italy. *Dve Domovini / Two Homelands* 41, 61–76.
- Morad, Mohammad, Gombač, Jure (2018). "Probashi" in Italy. *New Destinations: Trends, Origins and Profiles of Bangladeshi Migrants in Padova and Cadoneghe*. *Dve Domovini / Two Homelands* 47, 37–52.
- Morokvasic, Mirjana (1984). Birds of Passage are also Women .... *International Migration Review* 4, 886–907. DOI: 10.2307/2546066.
- Näre, Lena (2010). Sri Lankan Men Working as Cleaners and Carers: Negotiating Masculinity in Naples. *Men and Masculinities* 13/1, 65–86.
- Parreñas, Rhacel Salazar (2001). *Servants of Globalization: Women, Migration, and Domestic Work*. Stanford: Stanford University Press.
- Parreñas, Rhacel Salazar (2008). Transnational Fathering: Gendered Conflict, Distant Disciplining and Emotional Gaps. *Journal of Ethnic and Migration Studies* 7/34, 1057–1072. DOI: 10.1080/13691830802230356.
- Sarti, Raffaella (2010). Fighting for Masculinity: Male Domestic Workers, Gender, and Migration in Italy from the Late Nineteenth Century to the Present. *Men and Masculinities* 13/1, 116–143.
- Saucedo, Leticia M., Morales, Cristina (2010). Masculinities Narratives and Latino Immigrant Workers: A Case Study of the Las Vegas Residential Construction Trades. *Harvard Journal of Law and Gender* 33/2, 625–660.
- Sayad, Abdelmalek (1999). *La double absence: Des illusions aux souffrances de l'immigré*. Paris: Seuil.
- Scrinzi, Francesca (2010). Masculinities and the International Division of Care: Migrant Male Domestic Workers in Italy and France. *Men and Masculinities* 13/1, 44–64.
- Shereen, Hussein, Mohamed Ismail, Manthorpe, Jill (2014). Male Workers in the Female-dominated Long-term Care Sector: Evidence from England. *Journal of Gender Studies* 25/1, 35–49.

## POVZETEK

### TRANSNACIONALNE DRUŽINE IN MOŠKOST MIGRANTOV: SOCIALNI INSTITUT MOŠKE ODRASLOSTI IN ZDRUŽEVANJE DRUŽIN V BANGLADEŠKI DIASPORI V ITALIJI

Francesco DELLA PUPPA

Članek analizira družbeni konstrukt moškosti bangladeških migrantov v Italijo. Konkretno gre za izkušnjo združevanja družine na primeru migrantov iz Bangladeša in njihovih žena. Avtor v začetnem delu s pomočjo nekaterih bourdieuevskih konceptov analizira pomen združitve družine, ki je za migrante temeljni akt inštituta odrasle moškosti. V nadaljevanju proučuje pomen te izkušnje za očete in tiste migrantov, ki živijo v Bangladešu, kakor tudi njen vpliv na njihovo pojmovanje moškosti v skladu z njihovim privzgojenim *habitusom* in družbenim položajem. Poleg bourdieuevskega okvira je avtor v raziskovalni študiji kot analitsko orodje na poseben in neznačilen način uporabil dramaturško metaforo. Italijansko in bangladeško družbo je predstavil kot oder in zakulisje iste zgodbe, ki se medsebojno izmenjujeta glede na položaj govorcev. Empirično gradivo za pričujoči članek sestavljajo daljša obdobja spremljanja udeležencev tako v Italiji kot v Bangladešu ter 45 poglobljenih intervjujev, izvedenih v obeh državah.

Izkušnja ustvarjanja nuklearne družine, selitev in združitev družine so predstavljene kot dejanski akt inštituta odraslosti, s pomočjo katerega migranti postanejo možje v očeh rojakov v Italiji, kakor tudi v primerjavi – čeprav konfliktni – z očetom in s tastom (moških sorodnikov, ki jih je prav tako zaznamovala izkušnja migranstva) v Bangladešu. Združitev družine je za migranta priložnost, da zaživi svoje čustveno in družinsko življenje, hkrati pa tudi dolžnost do žene, ki jo mora izpolniti, da bi jo osvobodil patriarhalne moči razširjene družine. Navsezadnje je združitev družine tudi nekakšna oblika simboličnega nasilja nad pridruženo ženo – komponenta moške dominacije, ki se je migrant ne more osvoboditi. Združitev družine je, če jo opazujemo iz migrantove domovine oziroma dežele izvora, lahko tudi zelo boleča družinska rana, posledica patriarhalne strategije, ki naj bi prispevala k časti ženine družine in njenih moških predstavnikov, po drugi strani pa je lahko tudi vir ponižanja in sramote, kar je odvisno od razrednega položaja in *habitusa* družbenih akterjev. Razredni položaj, transnacionalne strategije in družbeni konstrukti moškosti tako tvorijo nekakšen presek, ki generira osebni profil moških, včasih tako vklenjenih v svojo potrebo po dominaciji, da jih ta sili v diferenciacijo družbenih oblik ustvarjanja spola; bolj jih vodi lastna predstava o nadrejenosti kot želja po obvladovanju. Konstrukcija predstav znotraj togih spolnih meja, ki ne strukturira le podrejenih, ampak tudi nadrejene, je prav tako podvržena vzvodom nadzora, ki vplivajo na njeno izražanje.



# CONTESTABLE DEMOGRAPHIC REASONING REGARDING LABOUR MOBILITY AND MIGRATION

Duška KNEŽEVIĆ HOČEVAR<sup>I</sup>, Sanja CUKUT KRILIĆ<sup>II</sup>

COBISS 1.02

## ABSTRACT

### Contestable Demographic Reasoning Regarding Labour Mobility and Migration

The essay provides a review of contestable demographic reasoning applied in relation to migration and mobility, in which the notion of the national population as a closed and bounded system still persists. Although free movement of people has been enshrined as one of the fundamental principles of the European Union, their mobility within it remains selective and curtailed in various ways. Drawing on selected studies of labour mobility and migration within the European Union, the authors argue that labour mobility and migration policies continue to categorise people as either more or less entitled to move across the European Union's internal borders.

**KEY WORDS:** labour mobility, labour migration, demographic reasoning, national population, European Union

## IZVLEČEK

### Delovna mobilnost in migracije v vprašljivem demografskem umovanju

Besedilo ponuja pregled vprašljivega demografskega umovanja migracij in mobilnosti, ki še vedno vztraja pri ideji nacionalnega prebivalstva kot zaprtega in zamejenega sistema. Čeprav je svobodno gibanje ljudi med temeljnimi načeli Evropske unije, je njihova mobilnost selektivna in na različne načine omejena. Na podlagi izbranih raziskav delovne mobilnosti in delovnih migracij v Evropski uniji avtorici potrjujeta, da delovne mobilnosti in migracije politike še vedno razporejajo kot bolj ali manj upravičene do gibanja čez meje nacionalnih držav Evropske unije.

**KLJUČNE BESEDE:** delovna mobilnost, delovne migracije, demografsko umovanje, nacionalno prebivalstvo, Evropska unija

---

<sup>I</sup> PhD in Anthropology, Senior Research Fellow, Sociomedical Institute ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; duska@zrc-sazu.si

<sup>II</sup> PhD in Sociology, Research Fellow, Sociomedical Institute ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; sanja.cukut@zrc-sazu.si

## INTRODUCTION

The recent concerned and disharmonious responses of European governments to the “refugee crisis” and the extensive migration and mobility in ageing Europe have reinvigorated the persistent appeal of political demographers that it is no longer possible to separate population policies from much wider considerations of the political implications of national identities, nationalisms and international affairs (Teitelbaum, Winter 1998). It seems that political messages are time and again grounded in reiterated demographic dystopias about reproductively more vital foreigners or foreign-born people who are supposedly responsible for the vanishing of the values, way of life, social position and even the culture of the less-reproductive domestic population. Such dystopias address and entrap mobile individuals and labour migrants as well, who as a rule are recognised by official statistics as foreign-born newcomers or as short-term transients, and are not registered in the population count at all.

This article discusses labour mobility and migration within socio-political discourses that address the persistent fear of the “proper composition” of national populations. The article refers to discussions about the perceived threatening compositional change to the “more familiar faces of Europe’s nations” (Kligman 2005: 253) brought by the increasing mobility and migration of certain populations within the European Union (EU).

Drawing on a secondary analysis of selected studies on labour mobility within the EU, the authors argue that migration and mobility within the EU borders are still being controlled and managed in ways that categorise mobile people and migrants as either more or less legitimate and desirable in their crossing of the EU’s internal borders.

In the first part, the article explores the demographic reasoning which refers to “empirically proven” demographic change moving in the direction of a radical transformation of the ethnic composition of Western Europe by below-replacement fertility and the emigration of the domestic population on the one hand, and the increasing immigration of people of various ethnic and racial backgrounds on the other. This issue is further discussed by presenting attempts to study the political consequences of such population dynamics in order to (dis)prove such concerns. To better understand such demographic dystopias, the authors look at the central concept of demography – the (national) population, and the history of its imagining.

In the second part, the practices and explanations of demographic processes are discussed through selected examples of labour mobility within the EU. Confronting the ideology of free movement across the EU’s internal borders, the authors discuss the legitimacy of different categories of mobile individuals, and how it is understood by policymakers and the public. In the final part of the article, the reader will learn whether mobile individuals are valued through the notions of an open or closed system of national population.

## CONTESTABLE DEMOGRAPHIC REASONING

### Fear of a “Transformed Composition” of the Population

In 2013, a workshop entitled “Population: The Long View” was held at St. John’s College in Oxford in order to discuss current, large-scale and long-term interdisciplinary population issues. The editors of the 2015 special issue of the journal *Population Studies*, David Coleman, Stuart Basten and Francesco C. Billari (Coleman et al. 2015), all well-recognized demographers, believed that recent demographic research had mostly focused on micro-level population analyses despite the impression that media and politics were dedicating more attention to macro-level population changes. These include unfavourable ratios between population and resources, rapid population growth in poorer countries and population ageing in richer ones, population decline in some countries and large-scale international migration in others, and population movements due to climate change.

The editors regretted that the invited authors did not pay more attention to the issue of migration (ibid.: S7). However, the reason for this might lie in a very sensitive discussion of the long-term consequences of population processes in Western Europe commenced by one of the editors, David Coleman, a decade ago (2006). In his article *Immigration and Ethnic Change in Low-Fertility Countries: A Third Demographic Transition* (2006), Coleman argued that in the last five decades in some industrial countries,<sup>1</sup> there was evidence for and empirical proof of altered ethnic composition through persistent below-replacement fertility of domestic populations, high levels of immigrants of remote geographical origins or with different ethnic and racial ancestry, and increasing emigration of domestic populations. According to Coleman, such demographic change – a precursor of a third demographic transition towards a radically transformed ethnic composition of Western Europe – should raise anxiety about several potential political consequences which had been de-emphasized by social science until now. Critical of the prevailing asymmetrical discussions, which as a rule highlighted the human rights of immigrants only, while labelling domestic protests against them racist and xenophobic, Coleman (2006: 427) strove for a “more balanced” debate without excluding those who warned against long-term consequences of the transformed and changing ethnic composition of European populations.

Coleman’s concern about the under-communicated political and social implications of the current demographic changes can be recognised in the works of the forerunners of political demography as a research field. Myron Weiner, the founder of the concept of political demography, warned against “difficult dimensions” of migration already in the early 1970s. Conducting fieldwork in selected places in India

---

1 Coleman’s calculations and population projections were applied to the USA and seven European countries: Austria, Germany, Denmark, the Netherlands, Norway, Sweden and the UK.

on the costs and benefits of migration for the local inhabitants, he pointed out the dilemma: "How to find a way in which local people belonging to one ethnic community could obtain greater equality in the employment market without at the same time restricting the opportunities of migrants and their descendants belonging to other ethnic groups [...]" (Weiner in Weiner, Teitelbaum 2001: vi).

Until his death in the late 1990s, Weiner devoted his career to investigating the political implications of large-scale population changes, i.e. issues that should be addressed by political demography. The newly proposed field of study referred mainly to the active responses of governments, their policies and the public to population change brought by fertility, mortality and (labour) migration. Yet this subject, that addressed so explicitly the relationship between politics and demography, did not attract the interest of political scientists even three decades after Weiner had defined the research area. Weiner ascribed this neglect to their poor knowledge of demographic theory, methods, and concepts, or their general viewpoint that demography was largely an atheoretical discipline, focused on the measurement of population size, composition and territorial distribution and detailed studies on fertility, mortality and territorial movement (ibid.).

Even now, when political scientists have finally recognised political demography as a significant research field,<sup>2</sup> Jack A. Goldstone explained that political scientists were uninterested in demography probably because demography evolved as a highly specialized and technical field of knowledge, requiring advanced mathematics and the analysis of enormous amounts of data necessary for studies of demographic change. The author believed that mutual collaboration between the two disciplines was inevitable since demographers usually cannot explain how people and social institutions would react to demographic changes (Goldstone 2012).

## Ignorance of the History of Population Theory

If demographers and political scientists, in their common project, strive for a mutually informed discipline of political demography in order to avoid misunderstanding the political implications of population change, it is necessary to look into the history of demography as a science (Demeny 1988; Hodgson 1991; Kreager 1993, 1997, 2008, 2009, 2015; Szreter 1993; Kertzer, Fricke 1997; Melegh 2006) in order to make it easier to understand the current demographic dystopias which usually serve as a guide for population policymakers. For instance, Coleman's concern about the changed composition of Western Europe can be more easily understood if we draw on the history of imagining the national population – the basic concept of contemporary demography. In his article *Population Theory – A Long View* (2015), Philip Kreager

---

2 The authors refer to the recently published collection of essays entitled *Political Demography: How Population Changes Are Reshaping International Security and National Politics* (2012).



re-emphasized<sup>3</sup> that demography had been in service of the state since the eighteenth century when the notion of population was defined anew. Contrary to ancient European empires and states of diverse aristocratic elites, in which the ethnic or religious affiliation of the population was secondary to the people's loyalty and productivity, the newly defined (national) population consisted of people with a common linguistic, cultural, and historical background, with associated material conditions such as residence in a common territory and shared descent. Compared to theories of government in ancient regimes, which put forward a mechanism of maintaining a balance and peace between sub-populations, modern nation-states became gradually seen as responsible for counting "all" the people with national statistical offices. The general idea of the population in ancient and early modern states did not address all the people as full citizens, but only a minority – usually adult male property-owners who belonged to various competing clans or factions (Kreager 2015).

An important novelty of the newly-defined population was the idea that population was not only a historical and cultural phenomenon but a natural one as well. Imagined organic ties to people's territory and environment were considered as people's natural rights to such places, and such "natural wholes" had to be "home-produced" (Kreager 1997: 156). Population was viewed as a closed-bounded system: a state boundary cut a population off from other populations across a boundary, and the boundary introduced an epistemological closure as a precondition for the demographic ideal of complete enumeration and records of its membership (*ibid.*).

This type of static understanding of a national population still underlies demographic reasoning about the population composition, including Coleman's reflection on the third demographic transition. Yet drawing on human agency – the perspective that explains individuals' creative and contestable management of collective identities and their making – the line of reasoning which understands a population as a homogenous unit of passive carriers of culture, can be at least questioned. Therefore, Kreager insisted that questions of how a population was defined for demographic research, and how collective identities were defined in a classificatory and mensurational exercise, should be central in applied demography, because such questions predetermined demographic reasoning about the composition of an observed population. Or, as Kreager himself puts it:

The fact that people may report their ethnic, religious, and other identities differently from one census to the next and may tailor birth, marital, occupational, and migration histories to suit currently preferred statuses, is significant not only as a potential source of bias affecting the analysis of trends but as evidence of the active adjustment of population composition and structure to changing circumstances. (Kreager 1997: 148)

---

3 Kreager has explained the idea of the national population in detail in previously published works; see e.g. Kreager 1997.

Finally, in demography it is common to view fertility, mortality and migration as constituents of the structure and composition of the observed population. Yet collecting data on migration compared to births and deaths has proved to be more demanding, since migration movements have only recently been introduced into the historical model of explanation of the first demographic transition (Van de Kaa 1999).<sup>4</sup>

Bringing migration into both explanatory models of historical demographic transitions, from high fertility and mortality rates to low levels, Van de Kaa showed that in the period of the first demographic transition, when the European populations were increasingly settling in “new worlds”, Europe was predominantly an emigration region.<sup>5</sup> Van de Kaa (2002) also believed that migration in Europe played a significant role between and after the two world wars, and when European countries were faced with massive movements of refugees and displaced persons, returning prisoners and others, when Europe experienced a temporary “revenge of history” during the de-colonization process. Moreover, he attributed a real shift of migration, this time as more permanent immigration to Europe, to the introduction of guest-worker programmes in the 1960s, when the governments of Western and Northern Europe tried to solve shortages of unskilled labour.

Yet the considerable immigration of guest workers in the 1960s and 1970s, emigration from Central and Eastern Europe after the fall of the Berlin Wall, and political asylum seekers from all over the world in the early 1990s, coincided with the recorded below-replacement fertility levels in European countries. Based on calculations showing that during the second demographic transition between 1965 and 1999 the majority of Western and Northern European countries registered population growth due to immigration, Van de Kaa (1999) assumed that Europe would turn from an emigrant to an immigrant region. He further believed that in the case of a temporary period of below-replacement fertility and continuing immigration, Europe would as so many times in the past adapt and act as an immigration area with a carefully controlled influx, while in the case of a lengthy period of below-replacement fertility and rapid ageing of the population it was immigration that would shape the demographic future of Europe. Yet Van de Kaa did not refer to just any kind of immigration. He explicitly advocated selected immigration if the immigrants were seen as a solution to the failed European self-reproduction: “Long-term considerations lead to the conclusion that the quality of immigrants and their willingness and ability to integrate are important for the viability and continuity of European civilization” (ibid.: 40).

---

4 In demography, the “first demographic transition” is used synonymously for so-called modern demographic behaviour denoted in the historical record as voluntarily limited marital fertility.

5 If demographers identified the first demographic transition through the available statistical evidence in the period of the radical fertility drop between 1850 and 1950 in nearly 700 European provinces (Friedlander et al. 1999), Van de Kaa set the start of the second demographic transition in 1965, when the majority of European countries first registered persistent sub-replacement fertility (Van de Kaa 1987).

## LABOUR MOBILITY AND MIGRATION BETWEEN IDEAS OF OPEN AND CLOSED POPULATION SYSTEMS

### Limits to the Freedom of Movement Principle

There is a discrepancy between the actual practices of the migrant-receiving countries that are more in line with the above presented idea of the national population as a closed system, and the idea of free movement of people enshrined in founding documents of the EU, such as the Treaty on the Functioning of the European Union. For instance, freedom of movement beyond the boundaries of national populations, introduced as one of the EU's fundamental freedoms, has been recognised in the Single European Act as a necessary element for the creation of the European common market (Kmak 2015). In its 2013 Communication on Free Movement, the European Commission announced that

the free movement of workers has positive effects on economies and labour markets. The four fundamental freedoms, which are inextricably linked, create the conditions for more efficient allocation of resources within the EU. Free movement of EU citizens stimulates economic growth by enabling people to travel, study and work across borders and by allowing employers to recruit from a larger talent pool. In view of the significant imbalances in Europe's labour markets and its declining working-age population, labour mobility contributes to addressing skills and job mismatches. (European Commission 2013: 2)

The recent lifting of obstacles for citizens of the EU Member States to seek employment in another EU country notwithstanding, citizens still face numerous difficulties when moving between different EU countries. It is generally agreed that the EU needs to further develop its policies to exploit its "mobility potential" (CEPS 2014). Yet labour mobility within the EU is still a limited phenomenon. According to the European Foundation for the Improvement of Living and Working Conditions, Europeans are not very much in favour of looking for a job abroad (Eurofound 2014). Van Houtum and Van Der Welde (2004) described this trend as "immobility" of the labour force, observing an overestimation of the potential mobility of the labour force in most studies on the issue.

Particularly in the last decade, there have been extensive discussions about the limits of the freedom of movement principle. Referring to increasing controls and management of mobility/migration, Favell (2008: 705) talked about a "new European migration system". Moreover, after the most recent enlargements of the EU (in 2004, 2007 and lastly in 2013), most of the "old" Member States have striven to counteract the expected "invasion" of the cheaper labour force from the "new" European Member States by imposing several transitional restrictions to entry to the labour

market in the forms of quotas and work permits. Despite attempts to facilitate the freedom of labour and movement in the internal EU market, Pijpers (2009) assessed the labour market entry policies in the “old” member states as largely restrictive in the first years after the enlargement. Needless to say, specialised labour market intermediaries, subcontractors and legal advisory firms profited from the transitional border closing through the application of all kinds of circumvention strategies in order to recruit scarce low-skilled labour from the new Member States (Pijpers 2007).

Similar recent examples of violation of labour legislation on posted work have demonstrated that the lifting of transitional restrictions in labour market access to citizens of new EU Member States has not resulted in a cessation of such violations. To illustrate, although

the posting of workers in principle contributes to balancing the demand and supply of services in the EU and provides valuable economic opportunities for companies and workers, it also exposes the deeply rooted tensions between promoting the free movement of goods, capital, services and labour on the one hand, and maintaining the European social model and established industrial relations, including industrial action to protect collective interests, on the other. (Vah Jevšnik, Rogelja 2018: 24)

While freedom of movement remains one of the most celebrated, practical and visible rights of the EU integration, as it also decreases the gaps and mismatches between skills and needs of the labour market in ageing societies and thus reduces sectoral labour shortages, limits remain to the implementation of this principle throughout the EU and to the exercise of the associated social rights. Despite the proclaimed common ideology of economic integration at the EU level, the Member States insist on keeping their respective welfare state systems under their own control (Barslund, Busse 2016).

## **Labour Mobility and Social Rights**

The “discretionary power” of the nation-states can also be seen in the granting of social rights to mobile individuals. Ciupijus (2011) argued that the processes of European integration could provide grounds for a more denationalised notion of citizenship, the so-called European citizenship. In practice, however, the Member States still make the right to residence conditional on active employment or the citizens’ possession of medical insurance in their respective countries. Moreover, the social rights afforded to mobile EU citizens are generally lower compared those afforded to citizens (Ciupijus 2011; Lafleur, Mescoli 2018).

At the policy level, the Citizenship Directive<sup>6</sup> has explicitly limited the mobility rights of EU citizens who have resided in an EU resident state for less than five years. Lafleur and Mescoli (2018: 483) even observed that workers, former workers who actively sought employment and persons who were not economically self-sufficient could lose their right of residence if they became an “unreasonable burden on the social system” of the host country.

It seems that arguments in favour of increased mobility were to a certain extent overshadowed by a general fear among the populations of most of the “old” Member States that too many workers from Eastern Europe were moving to the West primarily in search of generous welfare benefits (Ciupijus 2011; Roberts 2015; Lafleur, Mescoli 2018). The assumption behind such fears was that some categories of immigrants/mobile citizens were abusing the welfare system of the “host” societies to a higher degree than the others. It was perceived that they were threatening the very foundations of the European welfare states. Such was the statement of the UK Home Secretary in 2004 that despite positive effects of migration from the new member states, accession nationals were welcome to the UK only to work but not to claim benefits. A further intention was to restrict benefit entitlement (Roberts 2015).

Yet a study by the European Commission on this subject found little evidence of “benefit tourism” in Europe and contradicted claims by the governments in the UK, Germany, Austria and the Netherlands that EU social security systems were under strain, especially from Romanian and Bulgarian migrants (ICF GHK 2013). The study further showed that non-active EU migrants made up a very small share of the total population in each Member State. Also, on average, EU migrants were more likely to be employed than nationals living in the same country. Finally, the study showed that the vast majority of non-active EU migrants (79%) lived in economically active households, with only a minority of them living with other household members out of work (ICF GHK 2013).

In relation to the issue of supposed “welfare tourism” in the new EU Member States, Kmak (2015) found that the European Commission puts a strong emphasis on the work-oriented mobility of EU citizens and on the improvement of their personal lives, as well as reinvigoration of the EU economy. This assumption, in her view, suggested that EU citizens were subjectivised as “economic men”, rational and mobile individuals willing to travel to other countries in order to find remuneration best reflecting their skills. It is worth mentioning that the Commission’s emphasis on the significant prevalence of work-orientated mobility was followed by the information that only a small number of mobile EU citizens were economically inactive. Kmak (2015: 400) observed that “the Commission perceives EU citizens not only as rational

6 Directive 2004/58/EC of the the European Parliament and of the Council of 29 April 2004 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States amending Regulation (EEC) No 1612/68 and repealing Directives 64/221/EEC, 68/360/EEC, 72/194/EEC, 73/148/EEC, 75/34/EEC, 75/35/EEC, 90/364/EEC, 90/365/EEC and 93/96/EEC (*Official Journal of the European Union* L 158 of 30 April 2004).

but also as moral individuals, whose mobility is guided by work rather than the wish to be idle and to benefit from social assistance of receiving states". A similar message is conveyed through the talk about lifestyle, amenity and/or retirement migrants who are welcome only conditionally – when possessing sufficient economic means for living (Dwyer, Papadimitrou 2004).

Finally, Lafleur and Mescoli (2018: 481) believe that "with the economic and financial crisis, welfare policies are increasingly being turned into instruments for limiting the mobility of EU migrants". They further argue that restrictions to the "mobility of the poor" are mirrored in debates about migration selectivity, grounded in the perceived economic contribution of both non-EU as well as EU migrants. However, in these debates, not only the economic worth of individual migrants, but also ethnicised notions about the proper composition of national populations, come to the forefront.

### **Ethnicity Matters in Labour Mobility**

The utilitarian stance that migrants are needed to fill up labour shortages in selected sectors seems problematic in several ways. Gill (2009) demonstrated that the exploitation of migrants as a labour force that would fill up sectoral deficiencies in "native" labour markets without enabling them access to an array of social, economic and political rights was one of the perils of a conservative approach to the policy of unlimited migration. In this sense, the author also saw the attitude of proponents of the policy of open borders that the economic benefits of increased migration outweighed its costs as problematic. In an effort to disprove the argument that migrants would take away citizens' jobs, decrease their wage levels and/or overburden the national welfare systems, Gill noted the danger of entering into the discussion of "worth" and "legitimate" migration (ibid.). The same applies to programmes for managing migration/mobility, limiting/enabling access to the labour markets, favourable treatment for admission, and programmes designed to match labour supply with demand (Kyrieri 2007), which are a standard element of most nation-states' migration/mobility policies. Policies and discussions that recognise the "value" of mobile/migrant workers for the respective national economies also seem to convey the message that certain "kinds" of migrants are more valuable than others. There is a discrepancy between the desirable "migrant elites" and the migrant labour force that is perceived as needed by the policymakers and the general public (Zavratnik 2011).

The utilitarian understanding of migration is usually amplified with "arguments" about cultural differences and similarities that supposedly affect the possibility and level of migrant integration into a society. The chances of foreigners being allowed to play a role in a given society are seen as higher when they are perceived as being "easy to integrate". As Fox et al. (2012) showed in their analysis of the media in the UK, when covering the migration of East Europeans (particularly Hungarians and

Romanians) into the UK, the media invoked cultural difference as the basis for exclusion, and constructed cultural traits as a basis for differentiation. The authors found that the “Roma frame” in the media was freely applied to individuals who would not necessarily define themselves as Roma, in particular Romanians. In government policy discourses, on the other hand, “assumptions about shared whiteness operate as implicit criteria for racialized inclusion: East Europeans are desirable because they conform to the racialized understandings of Europeanness” (ibid.: 691).

In this view, Favell (2008) insisted that East European migrants from “new” Member States were increasingly filling the jobs considered as 3D (dirty, dangerous and dull) due to their perceived ethnic “similarity” and cultural “proximity” in comparison to the previously preferred “non-white” and “non-European” people. Favell also argued that an internal and regional labour market was increasingly developing. On the other hand, *l’affaire des Roms*, in which almost 1,000 Romanian and Bulgarian nationals of Roma origin living in France were expelled from the country in 2010 due to their supposed inability to sustain themselves economically and their “criminality” (Carrera, Faure Atger 2010; Lafleur, Mescoli 2018) remains a pertinent example of undermining the notion of free movement within the EU and of the ethnicisation of the Roma as “illegitimate” mobile individuals.

## CONCLUDING REMARKS

The current European picture of parallel trends of large-scale international migration, below-replacement fertility and ageing population is a demographic reality which as a rule stirs up fears and concerns of a vanishing European civilisation. The neglected field of the intertwined relationship between politics and population changes is often filled with rhetoric of exaggeration and garbled interpretations by politicians and journalists, who usually misunderstand and misuse demographic calculations and long-term population projections, or manipulate them in line with their political interests (Teitelbaum 2004, 2015).

However, such fears are also embedded in the demographic reasoning of empirically-based evidence of membership of nation-state population units, which as a rule serves as a guide for population policymakers. Neglecting questions of who or what is counted how, when and in what circumstances they are counted and how collective identities are defined renders demographic reasoning in line with the anachronistic idea of a national population as a closed system with a “proper composition”, where “the prime consideration is once again not the number of people but their ‘quality’” (Melegh 2006: 72)

Such primordial notions about the proper composition of the national populations are also continuously present in the discussions about movement of people within the EU borders. Intra-European movement, as observed by Van Ostaijen (2016), was classified by the European Commission as mobility and not as migration

due to the historical construction of the EU as a single or internal market. Despite the EU's commitment to the free movement of people as a means of further European integration, various mechanisms, such as transitional restrictions of entry to the EU labour markets, sectoral quotas, programmes to match labour supply with demand, the conditioning of residence upon the principle of sufficient economic means and the limiting of welfare state assistance to economically inactive individuals, curtail the free movement of individuals across the EU. Furthermore, in these discussions, cultural traits are constructed as a basis for differentiation and social exclusion of particular social groups. Therefore, it is not surprising that Lafleur and Mescoli (2018) even prefer to use the terms "EU migrants" over "mobile EU citizens" to reflect the precariousness of their status, which many individuals from EU countries share with third country nationals.

Whether and how to reconcile the apparently contradictory ideology of free movement within the EU, the "need for" migrants in ageing and low-fertility EU societies and the still prevailing demographic reasoning about the maintenance of a "proper composition of the population" remains a challenge for scientific reasoning beyond the closed system of national populations.

## REFERENCES

- Barslund, Mikkel, Busse, Matthias (2016). *Labour Mobility in the EU Addressing challenges and ensuring 'fair mobility'*. Brussels: CEPS, <https://www.ceps.eu/system/files/SR139%20MB%20and%20MB%20LabourMobility.pdf> (15. 10. 2017).
- Carrera, Sergio, Faure Atger, Anais (2010). *L'affaire des Roms: A Challenge to the EU's Area of Freedom, Security and Justice*. Brussels: Centre for European Policy Studies, <https://www.ceps.eu/system/files/book/2010/09/Carrera%20%26%20Faure%20Atger%20on%20Roma%20Affair.pdf> (15. 7. 2018).
- CEPS (2014). *Making the Most of EU Labour Mobility*. Brussels: Centre for European Policy Studies, <https://www.ceps.eu/system/files/CEPS%20Making%20the%20Most%20of%20Labour%20Mobility%20Oct-3.pdf> (10. 5. 2018).
- Coleman, David (2006). Immigration and Ethnic Change in Low-Fertility Countries: A Third Demographic Transition. *Population and Development Review* 32/3, 401–446.
- Coleman, David, Basten, Stuart, Billari C. Francesco (2015). Population—The Long View. *Population Studies: A Journal of Demography* 69/S1, S1–S9.
- Ciupijus, Zinovijus (2011). Mobile Central Eastern Europeans in Britain: Successful European Union Citizens and Disadvantaged Labour Migrants? *Work, Employment and Society* 25/3, 540–550.
- Demeny, Paul (1988). Social Science and Population Policy. *Population and Development Review* 14/3, 451–479.
- Directive 2004/58/EC of the European Parliament and of the Council of 29 April 2004 on the Right of Citizens of the Union and their Family Members to Move and



- Reside Freely within the Territory of the Member States Amending Regulation (EEC) No 1612/68 and Repealing Directives 64/221/EEC, 68/360/EEC, 72/194/EEC, 73/148/EEC, 75/34/EEC, 75/35/EEC, 90/364/EEC, 90/365/EEC and 93/96/EEC (Official Journal of the European Union L 158 of 30 April 2004), <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2004:229:0035:0048:en:PDF> (10. 7. 2018).
- Douglass, Carrie B. (ed.) (2005). *Barren states: The Population 'Implosion' in Europe*. Oxford, New York: Berg.
- 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.
- ECF GHK (2013). *A Fact Finding Analysis on the Impact on the Member States' Social Security Systems of the Entitlements of Non-active Intra-EU Migrants to Special Non-contributory Cash Benefits and Healthcare Granted on the Basis of Residence*, [http://ec.europa.eu/employment\\_social/empl\\_portal/facebook/20131014%20GHK%20study%20web\\_EU%20migration.pdf](http://ec.europa.eu/employment_social/empl_portal/facebook/20131014%20GHK%20study%20web_EU%20migration.pdf) (10. 11. 2017).
- EUROFOUND (2014). *Labour Mobility in the EU: Recent Trends and Policies*. Luxembourg: Publications Offices of the European Union.
- European Commission (2013). *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Free Movement of EU Citizens and their Families: Five Actions to Make a Difference*. Brussels, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52013DC0837&from=EN> (15. 11. 2017)
- Favell, Adrian (2008). The New Face of the East-West Migration in Europe. *Journal of Ethnic and Migration Studies* 34/5, 701–716.
- Fox, Jon E., Moroşanu, Laura, Szilassy, Eszter (2012). Racialization of the New European Migration to the UK. *Sociology* 46/4, 680–695.
- Friedlander, Dov, Okun, Barbara S., Segal, Sharon (1999). The Demographic Transition Then and Now: Processes, Perspectives, and Analyses. *Journal of Family History* 24/4, 493–533.
- Gill, Nick (2009). Whose "No Borders" Achieving Border Liberalization for the Right Reasons. *Refuge* 26/2, 107–120.
- Goldstone, Jack A. (2012). A Theory of political Demography: Human and Institutional Reproduction, *Political Demography: How Population Changes Are Reshaping International Security and National Politics* (eds. Jack A. Goldstone, Eric P. Kaufmann, Monica Duffy Toft). Boulder, London: Paradigm Publishers, 10–28.
- Hodgson, Dennis (1991). The Ideological Origins of the Population Association of America. *Population and Development Review* 17/1, 1–34.
- Kertzer, David I., Fricke, Tom (eds.) (1997). *Anthropological Demography: Toward a New Synthesis*. Chicago, London: The University of Chicago Press.
- Kertzer, David I., Fricke, Tom (eds.) (1997). Toward an Anthropological Demography. *Anthropological Demography: Toward a New Synthesis*. Chicago, London: The University of Chicago Press, 1–35.

- Kligman, Gail (2005). A Reflection on Barren States: The Demographic Paradoxes of Consumer Capitalism. *Barren states: The Population 'Implosion' in Europe* (ed. Carrie B. Douglass). Oxford, New York: Berg, 249–259.
- Kmak, Magdalena (2015). Between Citizen and Bogus Asylum Seeker: Management of Migration in the EU through Technology of Morality. *Social Identities* 21/4, 395–409.
- Kreager, Philip (1993). Histories of Demography. *Population Studies* 47/3, 519–539.
- Kreager, Philip (1997). Population and Identity: Anthropological Demography. *Anthropological Demography: Toward a New Synthesis* (eds. David Kertzer, Tom Fricke). Chicago, London: The University of Chicago Press, 139–174.
- Kreager, Philip (2008). Aristotle and Open Population Thinking. *Population and Development Review* 34/4: 599–629.
- Kreager, Philip (2009). Darwin and Lotka: Two Concepts of Population. *Demographic Research* 21/16: 469–502.
- Kreager, Philip (2015). Population theory – A long View. *Population Studies: A Journal of Demography* 69/S1: S29–S37.
- Kyrieri, Katerina Marina (2007). Demographic Changes, Immigration Policy and Development in the European Union. *EIPASCOPE* 2, 21–26.
- Lafleur, Michel, Mescoli, Elisa (2018). Creating Undocumented EU Migrants through Welfare: A Conceptualization of Undeserving and Precarious Citizenship. *Sociology* 52/3, 480–496.
- Melegh, Attila (2006). *On the East-West Slope: Globalization, Nationalism, Racism and Discourses on Eastern Europe*. New York: Central European University Press, [http://www.pwsz.krosno.pl/gfx/pwszkrosno/pl/defaultaktualnosci/675/5/1/s06\\_ab\\_attila\\_melegh\\_eastwest.pdf](http://www.pwsz.krosno.pl/gfx/pwszkrosno/pl/defaultaktualnosci/675/5/1/s06_ab_attila_melegh_eastwest.pdf). (29. 10. 2017).
- Pijpers, Roos (2007). *Between Fear of Masses and Freedom of Movement: Migrant Flexwork in the Enlarged European Union*. PhD thesis. Nijmegen: Department of Human Geography and Spatial Planning, Radboud University.
- Pijpers, Roos (2009). International Employment Agencies and Migrant Flexiwork in an Enlarged European Union. *Journal of Ethnic and Migration Studies* 36/7, 1079–1097.
- Roberts, Simon (2015). *Benefit Tourism: A Moral Panic?* Maltese Seminar: 'Benefit Tourism: Myth or Reality' 27 May 2015, <http://ec.europa.eu/social/BlobServlet?docId=14044&langId=en> (23. 11. 2017).
- Szreter, Simon (1993). The Idea of Demographic Transition and the Study of Fertility Change: A Critical Intellectual History. *Population and Development Review* 19/4, 659–702.
- Teitelbaum, Michael S., Winter, Jay (1998). *A Question of Numbers: High Migration, Low Fertility, and the Politics of National Identity*. New York: Hill and Wang.
- Teitelbaum, Michael S. (2004). The Media Marketplace for Garbled Demography. *Population and Development Review* 30/2, 317–327.

- Teitelbaum, Michael S. (2015). Political Demography: Powerful Trends Under-Attend-ed by Demographic Science. *Population Studies: A Journal of Demography* 69/S1, S87–S95.
- Treaty on the Functioning of the European Union (2012). *Official Journal of the Euro-pean Union* 326/47.
- Van de Kaa, Dirk Jan (1987). Europe's Second Demographic Transition. *Population Bul-letin* 42/1, 3–57.
- Van de Kaa, Dirk Jan (1999). Europe and its Population: The Long View. *European Pop-ulations: Unity in Diversity* (eds. Dirk Jan van de Kaa, Henri Leridon, Giuseppe Ge-sano, Marek Okólski). Dordrecht, Boston, London: Kluwer Academic Publishers, 1–50.
- Van De Kaa, Dirk Jan (2002). *The Idea of a Second Demographic Transition in Industrial-ized Countries*. Paper presented at the sixth Welfare Policy Seminar of the Nation-al Institute of Population and Social Security, Tokyo, Japan, 29 January, [http://www.ipss.go.jp/webj-ad/WebJournal.files/population/2003\\_4/Kaa.pdf](http://www.ipss.go.jp/webj-ad/WebJournal.files/population/2003_4/Kaa.pdf) (10. 3. 2017).
- Vah Jevšnik, Mojca, Rogelja, Nataša (2018). Occupational Safety and Health in Trans-national Workplaces: The Case of Posted Workers. *Dve Domovini / Two Homelands* 48, 23–36.
- Van Houtum, Henk, Van Der Velde, Martin (2004). The Power of Cross-border La-bour Market Immobility. *Tijdschrift voor Economische en Sociale Geografie* 95/1, 100–107.
- Van Ostaijen, Mark (2016). Between Migration and Mobility Discourses: The Perform-ative Potential within 'Intra-European Movement'. *Critical Policy Studies* 11/2, 1–25.
- Weiner, Myron, Teitelbaum, Michael, S. (2001). *Political Demography, Demographic En-gineering*. New York, Oxford: Berghahn Books.
- Zavratnik, Simona (2011). Sodobne migracije v mnenjih slovenske javnosti. *Dve do-movini / Two Homelands* 33, 55–71.

## POVZETEK

### DELOVNA MOBILNOST IN MIGRACIJE V VPRAŠLJIVEM DEMOGRAFSKEM UMOVANJU

Duška KNEŽEVIĆ HOČEVAR, Sanja CUKUT KRILIĆ

Besedilo ponuja pregled vprašljivega demografskega umovanja migracij in mobilnosti, ki še vedno vztraja pri ideji nacionalnega prebivalstva kot zaprtega in zamejenega sistema s »primerno sestavo« svojega prebivalstva. Nedavni zaskrbljeni in neusklajeni odzivi evropskih vlad na »begunsko krizo« in obsežne migracije v starajočo se Evropo so ponovno oživili demografske distopične predstave o reproduktivno bolj vitalnih tujcih oziroma v tujini rojenih ljudeh, ki domnevno ogrožajo obstoječe vrednote, način življenja, družbeni položaj in celo kulturo manj reproduktivnega domačega prebivalstva. To problematiko besedilo sprva presoja s predstavitvijo poskusov preučevanja političnih posledic tovrstnih prebivalstvenih gibanj, da bi se potrdilo ali ovrglo strahove in zaskrbljenosti glede spremenjene prebivalstvene sestave. Za boljše razumevanje nastalih demografskih distopij besedilo naslavlja središčni demografski koncept (nacionalnega) prebivalstva in zgodovino njegovega oblikovanja.

V nadaljevanju besedilo presoja tovrstne demografske predstave, ki implicitno naslavlja in zajemajo tudi mobilne posameznike in posameznice ter delovne migrante in migrantke, ki jih uradne statistike praviloma označujejo kot v tujini rojene ljudi ali jih kot kratkoročno priseljene posameznike in posameznice v statističnem štetju nacionalnega prebivalstva sploh ne registrirajo. Čeprav je svobodno gibanje ljudi med temeljnimi načeli Evropske unije, avtorici zatrjujeta, da je njihova mobilnost v njej selektivna in na različne načine omejena. Na podlagi izbranih raziskav delovne mobilnosti in delovnih migracij v Evropski uniji avtorici potrjujeta, da delovne mobilnosti in migracije politike nadzirajo in upravljajo s pomočjo mehanizmov, ki ljudi še naprej razporejajo kot bolj ali manj upravičene do gibanja čez meje nacionalnih držav Evropske unije. Med mehanizmi vzdrževanja zelene družbenoekonomske sestave prebivalstva avtorici presojata prehodne omejitve vstopa na trge dela držav članic, sektorske kvote, programe za usklajevanje ponudbe na trgu dela z njegovimi potrebami, pogojevanje pravice do bivanja z zadostnimi ekonomskimi sredstvi in omejevanje pomoči države blaginje ekonomsko neaktivnim ljudem. Obenem pokažeta, da ti mehanizmi naslavlja tudi bolj ali manj podobne ali oddaljene kulturne značilnosti priseljencev in priseljenk kot podlago za razlikovanje in družbeno izključevanje določenih družbenih skupin. Ali in kako uskladiti protislovje med ideologijo prostega gibanja ljudi v Evropski uniji, »potrebo po« migrantih in migrantkah v starajočih družbah s prevladujočimi trendi nizke rodnosti ter še vedno prevladujočim demografskim umovanjem o vzdrževanju »primerne prebivalstvene sestave«, ostajata dilema in izziv za znanstveni pogled onkraj zaprtega sistema nacionalnega prebivalstva.

## »MARIBOR OB MORJU«: ZVEZA KOMUNISTOV SLOVENIJE IN VPRAŠANJE POSELITVE KOPRSKEGA OKRAJA V LETIH 1945–1965

Lev CENTRIH<sup>1</sup>

COBISS 1.01

### IZVLEČEK

**»Maribor ob morju«: Zveza komunistov Slovenije in vprašanje poselitve Koprškega okraja v letih 1945–1965**

Avtor v članku obravnava poseljevanje Koprškega okraja po drugi svetovni vojni. V prvih povojnih letih so se na Koprsko iz notranjosti Slovenije večinoma priseljevali strokovni in politični kadri, v poznejšem obdobju pa so se priseljenci zaposlovali kot industrijski delavci. Po avtorjevi hipotezi so komunistične oblasti načrtno spodbujale priseljevanje samo v prvem obdobju, pozneje pa so ti procesi potekali precej bolj spontano.

**KLJUČNE BESEDE:** priseljevanje, nacionalno vprašanje, Zveza komunistov Slovenije, Primorska, slovenska Istra, Izola, Koper

### ABSTRACT

**“Maribor by the Sea”: The League of Communists of Slovenia and the Question of the Settlement of the Koper District 1945–1965**

In the article the author deals with reflections on the settlement of the Koper District (Koprski okraj) after the Second World War. In the first post-war years, Koper was mostly settled by professionals and political functionaries, and later by other people from various social strata. According to the author's hypothesis, the communist authorities systematically encouraged settlement only during the first period, and later these processes took place more spontaneously.

**KEY WORDS:** settlements, national question, League of Communists of Slovenia, Koper, Primorska, Slovenian Istria, Izola, Koper

---

<sup>1</sup> Dr. sociologije, asistent z doktoratom za področje zgodovine; Univerza na Primorskem, Fakulteta za humanistične študije, Oddelek za zgodovino in Inštitut za medkulturne študije, Titov trg 5, SI-6000 Koper; Inštitut za civilizacijo in kulturo, ICK, Beethovnova ulica 2, SI-1000 Ljubljana; lev.centrih@fhs.upr.si — Članek je rezultat temeljnega raziskovalnega projekta »Nadzor nad migracijami na Slovenskem od Avstro-Ogrske do samostojne Slovenije« (J6-8250 (B)), ki ga financira Javna agencija za raziskovalno dejavnost Republike Slovenije. Avtor se zahvaljuje anonimnemu recenzentu/recenzentki za nadvse koristne kritične pripombe, popravke in nasvete.

## UVOD

Koprski okraj so v desetletju po drugi svetovni vojni doletele vélike populacijske spremembe. V tem času je z območja več kot polovica prebivalstva odšla v Italijo; najprej v Trst, nato pa pogosto v druge evropske države in celo na druge celine. Med njimi je bilo največ Italijanov, precej Slovencev, v manjšem deležu tudi Hrvatov. Problematika je v mednarodni in slovenski stroki doslej že zelo dobro raziskana. Vprašanja migracij s tega prostora so se lotevali raziskovalke in raziskovalci s področij geografije, demografije, zgodovine, sociologije, ekonomije in antropologije. Statistični podatki migracijskih tokov v Koprskem okraju so bili zbrani in interpretirani že v šestdesetih letih prejšnjega stoletja (Titl 1961, 1965). Zgodovinopisje je pozneje prispevalo analizo organizacije vojaško-civilne uprave in najpomembnejših političnih dogodkov, ki so dinamizirali migracijska gibanja tega območja (npr. Troha 2000a; Godeša 2000; Čelik 2013).

Ustrezno je bil ovrednoten pomen Trsta kot gravitacijskega jedra za različne migracije v tem prostoru že stoletje pred usodnimi dogodki po drugi svetovni vojni (npr. Panjek 2011; Kalc 2015). Poleg tega so za raziskovanje migracij na voljo pomembne »mikroštudije« mest, med njimi Izole in Pirana, Rudnika premoga Sečovlje (Kramar 2002; Pletikosić 2000, 2006) in spominska literatura (Perovšek 1995). Sociološki in ekonomski pristop k zgodovini migracij Koprskega okraja je v zadnjih dveh desetletjih pod vprašaj postavil negibnost nacionalnih identitet v tem prostoru in ponudil vrsto dokazov neujemanja med maternim/občevalnim jezikom in nacionalno pripadnostjo (Gombač 2005; Panjek 2011).

Tema pričujočega članka je vprašanje, kako so si slovenske politične oblasti zamišljale ponovno poselitev obalnih mest, ki so izgubila večino prebivalstva. Navedene raziskave so zelo natančno analizirale dinamiko izseljevanja iz obalnih mest in njihovega zaledja, prav tako so zabeležile priseljski tok iz notranjosti Slovenije in drugih jugoslovanskih republik, pa tudi primere negativnih odzivov na prišleke. Nedorečene so ostale pri vprašanju, kakšen odnos so imele do novih priselitev slovenske politične oblasti. Izseljevanje iz Koprskega okraja je postalo zares množično šele sredi petdesetih let. Kljub temu so politične oblasti zaskrbljenost nad pomanjkanjem delovne sile izražale že v času bolj postopnega izseljevanja. Povedano drugače: zastavlja se vprašanje, kako so povojne slovenske politične oblasti regulirale tokove priseljevanja v Koprski okraj; ali so za te potrebe izdelale kakšen konkreten načrt ali so delovale bolj stihijsko, tj. glede na okoliščine? Obstoječa literatura na ta vprašanja ponuja dva različna odgovora: Jure Gombač, ki je v svoji analizi beležil pritok novih priseljencev, ocenjuje, da so slovenske oblasti populacijsko praznino na Koprskem načrtno zapolnile z ljudmi iz notranjosti (Gombač 2005: 11); France Perovšek, v zgodnjih petdesetih letih predstavnik Vlade Ljudske republike Slovenije (LRS) v coni B Svobodnega tržaškega ozemlja (STO), pa v svojih spominskih pripoveduje, da ustrezen, celostno zastavljen naselitveni načrt za Slovenijo sploh ni obstajal (Perovšek 1995: 188). Naseljevanje ljudi iz notranjosti Slovenije je bilo po njegovem »prepočasno in premalo sistematično« (prav tam).

Namen pričujočega članka je na podlagi arhivskih virov analizirati, kako so se slovenski komunisti spoprijemali s problemom ponovne poselitve obalnih mest. Kdaj je problem novih poselitev teh mest sploh nastal? Kako je bilo spoprijemanje s problemom novih poselitev povezano s komunističnim razumevanjem reševanja nacionalnega vprašanja? Priselitve v Koprsko primorje so imele po eni strani povsem ekonomsko funkcijo, saj je bilo treba po odhodu italijanske populacije zapolniti manko delovne sile in strokovno-administrativnega kadra. Po drugi strani pa je bila več kot desetletje po osvoboditvi aktualna poprava posledic fašistične raznarodovalne politike. Ali so bile nove poselitve razumljene kot sredstvo za odpravljanje teh posledic?

Časovno raziskava zajema obdobje 1945–1965, tj. čas dveh režimov upravljanja države in narodnega gospodarstva: od centralnoplanskega režima po sovjetskem vzoru, do samoupravno-decentraliziranega. Izhodišče raziskave je hipoteza, da je bilo vprašanje ponovne poselitve Koprškega okraja za oblasti v obeh obdobjih predvsem vprašanje upravljanja z delovno silo, iz česar sledi, da imamo potencialno opravka z dvema strategijama upravljanja z migracijami: 1) režim stroge regulacije, kjer se alokacija delovne sile obravnava enako kot alokacija drugih sredstev, tj. finančnih tokov in blaga; 2) režim decentralizacije, v katerem se razvije trg delovne sile, s tem pa tudi svobodnejši in stihijski tok migracij, s katerimi imajo bolj kot centralne politične oblasti in organi opravka gospodarske organizacije, zavodi za zaposlovanje in lokalne skupnosti.

V prvem delu članka predstavljam uporabljene arhivske vire, v drugem delu politične prioritete Komunistične partije/Zveze komunistov v Koprskem okraju, v tretjem delu pa analiziram odnos komunistov do priselitev v obalna mesta, na koncu sledi sklep.

Ker se članek omejuje na dokumente organov Komunistične partije/Zveze komunistov, ne pa tudi drugih pomembnih institucij oblasti, kot na primer Socialistične zveze delovnega ljudstva, Ljudske mladine Slovenije, Izvršnega sveta/Vlade LRS, so sklepne ugotovitve predstavljene samo v obliki hipotez in ostajajo odprte za nadaljnje raziskovanje.

## ORGANIZACIJSKA STRUKTURA KPS/ZKS V KOPRSKEM OKRAJU IN ARHIVSKI VIRI

Koprski okraj je po drugi svetovni vojni najprej spadal v cono B Julijske krajine, od leta 1947 do londonskega memoranduma leta 1954 pa v cono B Svobodnega tržaškega ozemlja (STO), v obeh primerih je bil pod Vojaško upravo Jugoslovanske armade (VUJA). V civilnoupravnem pogledu je bil Koprski okraj do leta 1952 del Istrskega okrožja, katerega najvišji organ je bil Istrski okrožni ljudski odbor (Troha 2000b: 259; Kramar 2002: 91). V političnem pogledu je v Koprskem okraju ob nekaj marginalnih meščanskih strankah po dogovoru med Komunistično partijo Italije (KPI) in Komunistično partijo Slovenije (KPS) od avgusta 1945 obstajala Komunistična partija Julijske krajine (KPJK), dejavna tako v coni A kot v coni B. KPJK je bila samostojna politična

organizacija samo na papirju, saj je imela v njej odločujoči vpliv KPS, kar je botrovalo številnim konfliktom z vodstvom KPI. Prvi sekretar KPJK je bil namreč Boris Kraigher, eden vodilnih slovenskih komunistov (Troha 1993: 155). France Perovšek se je spominjal: »Partijsko smo bili z Ljubljano dejansko najmanj toliko povezani kot z vodstvom KPJK v Trstu. Osebnostno sem se kot gost udeleževal vseh pomembnejših sestankov, ki jih je imel CK KPS s slovenskimi okrožnimi in občasno tudi z ostalimi vodstvi« (Perovšek 1995: 97).

Leta 1947 se je zaradi spremenjenih političnih okoliščin KPJK preimenovala v KP STO. Branko Babič je na mestu sekretarja zamenjal Kraigherja, ki je postal slovenski minister za notranje zadeve. Po sporu z informbirojem leta 1948 je v KP STO prišlo do razkola; odslej so partijske organizacije v obeh conah delovale ločeno, ime KP STO pa se je v obeh conah ohranilo do petdesetih let (Kramar 2002: 52). Okrajni komite (OK) Koper, v katerega sta takrat spadali tudi mesti Izola in Piran, je bil tako še naprej formalno del posebne komunistične partije, dejansko pa je bil podrejen KPS in njegovemu CK v Ljubljani. Sklep Politbiroja CK KPS iz septembra 1949 je bil glede tega izrecen: »OK Koper ostane formalno vključen v Partijo STO-ja, interno pa ga je treba podrediti našemu CK-ju. Organizirati oddelke pri OK in jih vezati na naš partijski aparat. Isto velja za vse množične organizacije in oblast.«<sup>1</sup>

CK KPS je torej v celoti nadzoroval delovanje komunistične partije v Koprskem okraju. OK Koper je bil dejansko v enakem položaju kot okrajni komiteji drugod po Sloveniji. Iz tega sledi, da je arhivski fond CK ZKS pomembno izhodišče za raziskovanje političnega in družbenega življenja v povojnem Koprskem okraju tudi za obdobje pred londonskim memorandumom 1954, ko je bilo to območje uradno priključeno Sloveniji oziroma Jugoslaviji.

KPS/ZKS je bila v povojnem obdobju vodilna politična sila na Slovenskem. Sekretar OK ZKS Koper, Albert Jakopič – Kajtmir, je leta 1961 pojasnjeval: »V revolucionarni borbi za oblast in pa za njeno utrditev mora seveda Komunistična partija doseči maksimalno koncentracijo oblasti v svojih rokah.«<sup>2</sup> Koncentracija oblasti med drugim predvideva zbiranje informacij o vseh bistvenih področjih družbenega, gospodarskega in političnega življenja. Drugače kot pri meščanskih političnih strankah v Zahodni Evropi so bili organi komunističnih partij v Jugoslaviji in na »Vzhodu« država v malem. Ohranjeni dokumenti teh organov so zato za raziskovalce zgoščen povzetek vseh pomembnejših dogajanj iz kulture, gospodarstva, politike, nemalokrat pa tudi iz vsakdanjega in zasebnega življenja nekega družbenega okolja. Vsekakor gre za pristranske povzetke preteklosti – ker nepristranskih poročil pravzaprav ni, jih ne moremo pričakovati niti od organizacij in administrativnih organov v politično mnogo bolj tekmovalnih družbah, kot je bila takratna slovenska.

1 Arhiv Republike Slovenije, AS 1589/III, CK ZKS, t. e. 2, a. e. 24–167, Zapisnik seje politbiroja CK KPS, 20. 9. 1949.

2 AS 1589/IV, CK ZKS, t. e. 1604, a. e. 113, Gradivo za seminarje s člani občinskih komitejev in Okrajnega komiteja ZKS Koper, 1961, str. 2.



Za članek sem največ izčrpnih informacij pridobil iz zapisnika seje CK ZKS s člani OK ZKS Koper (julij 1953) in iz zapisnika 1. konference ZK okraja Koper z dne 22. in 23. februarja 1956 v Portorožu. Sledijo zapisniki in poročila sestankov OK ZKS Koper iz srede petdesetih let in Občinskega komiteja ZKS Koper iz šestdesetih let, med katerimi je zlasti zanimiva analiza z naslovom Kratek pregled družbenogospodarskega razvoja Slovenskega Primorja (1954). Pomembni so tudi zapisniki, poročila in drugo gradivo Tržaškega in Istrskega okrožja 1945–1950, ki so del fonda CK ZKS. Tam se nahajajo dolgi sezname oseb, ki so odšle oziroma pobegnile iz primorskih mest takoj po vojni, pa tudi informacije o gospodarskih in političnih problemih na Koprskem v obdobju do londonskega memoranduma. Nadvse povedni so tudi zapisniki, poročila in analize osnovnih organizacij ZKS v podjetjih okrajev Gorica, Kočevje, Koper (1956), kjer so podatki o fluktuaciji delovne sile pa tudi o mednacionalnih odnosih v podjetjih. Zanimiv vir so dnevne informacije organizacijsko- inštruktorske uprave pri CK KPS/ZKS, ki so beležile zelo različne podatke, od obiskovanja verskih obredov partijskega članstva do gospodarskih problemov. Za obravnavano tematiko so bili najmanj izčrpnih zapisniki sej Politbiroja in CK KPS/ZKS.

## **PRIORITETE POLITIČNEGA DELA KPS/ZKS V KOPRSKEM OKRAJU V PRVIH POVOJNIH LETIH IN VPRAŠANJE POSELJEVANJA**

Iz arhivskega gradiva fonda CK ZKS je razvidno, da so bile temeljne prioritete komunistov na Koprskem v povojnem obdobju agrarna reforma, industrializacija, volitve v ljudske odbore, informbirojevci in Katoliška cerkev. Navedene prioritete se niso razlikovale od tistih, ki so Partijo zaposlovale v notranjosti Slovenije, v splošnem pa ne tudi drugod po Jugoslaviji. Na Koprskem je bil položaj bolj zapleten zaradi negotovega statusa cone B STO, saj se do petdesetih let ni vedelo, ali bo teritorij pripadel Jugoslaviji ali Italiji. Priključitev cone B Jugoslaviji, tj. Sloveniji in Hrvaški, je oblasti zelo skrbela, zlasti intenzivno po letu 1947, ko je Gorica pripadla Italiji, dokončni status Trsta pa je ostal nerešen. Ker prisotnost Vojaške uprave Jugoslovanske armade sama na sebi ni zagotavljala, da bo teritorij dejansko ostal pod nadzorom Jugoslavije, je bilo za oblasti ključno, da večino prebivalstva pridobijo za novo jugoslovansko državo. Bistvenega pomena je bila gospodarska obnova, ki bi prebivalcem v Jugoslaviji omogočila vsaj primerljivo, če že ne boljše življenje kot ljudem v Coni A STO. Problemi, ki so ob tem nastali, so bili v določeni meri lokalna posebnost. Številna partijska poročila in analize so kot temeljni problem vse do srede petdesetih let v ospredje postavljali izgubo Trsta in Gorice, kamor je dolga desetletja gravitiralo lokalno gospodarstvo. Številni delujoči industrijski obrati so bili surovinsko in drugače povezani s Trstom, lokalno prebivalstvo pa je bilo tam ali zaposleno ali pa je tja prodajalo svoje kmetijske izdelke:

Komercialni center konzervne industrije, tj. generalne direkcije tovarn Ampelea in Arrigoni, ki so vodile vse komercialno in finančno poslovanje svojih podjetij, so ostale v Trstu, s čimer so ta izgubila ves trgovski stik s svetom in se znašla brez potrebnega obratnega kapitala, brez potrebnih surovin in z zalogami produktov vojnega izvora. Podobna usoda je zadela tudi ostalo industrijo, ki je bila navezana na uvoz surovin iz Italije in na plasman produktov v inozemstvo.<sup>3</sup>

Enake težave so takrat pestile tudi ozemlje, ki je že leta 1947 po pariški mirovni pogodbi pripadlo Jugoslaviji, kjer je zaradi sprememb po letu 1947 »znaten del prebivalstva [...] prisiljen, da se bodisi povrne nazaj v kmetijsko proizvodnjo, kar je povzročalo v nekaterih krajih agrarno prenaseljenost; ali pa da se izseli in si poišče zaposlitve drugje«. <sup>4</sup> Rešitev se je ponujala v gospodarski integraciji tega prostora z Jugoslavijo:

Normalizacijo gospodarskega stanja v Istrskem okrožju in s tem rešitev številnih vprašanj tamkajšnje industrije je v veliki meri možno izvesti le s popolno gospodarsko naslonitvijo tega teritorija na FLRJ, ki bi tako v pogledu preskrbe s surovinami kot v pogledu plasmata produktov prevzela vlogo Trsta in tako ponovno vzpostavila veliko industrijo, ki v sedanjih pogojih nima nikakih življenjskih pogojev.<sup>5</sup>

Poleg novega trga bi bile nedvomno potrebne tudi znatne investicije. Gotovo so obstajale tudi potrebe po novi delovni sili, čeprav nas statistični podatki napeljujejo k sklepu, da so bile te potrebe neprimerno večje pozneje, po letu 1953, ko je izseljevanje postalo bolj množično. Iz Okraja Koper se je v letih 1945–1950 po podatkih Vuje legalno in ilegalno odselilo več kot 5500 ljudi, do oktobra 1953 vsega skupaj 9008 (Troha 2000b: 260; Gombač 2005: 131). V letih 1953–1958 se je izselilo več kot 16.000 oseb (Troha 2000b: 260–261). V prvih povojnih letih se je sprva izseljevalo kmečko prebivalstvo, v samo treh letih se je, na primer v Kortah in Pomjanu, število prebivalcev znižalo za 25 oziroma 20 odstotkov, medtem ko so obalna mesta sprva doživela porast.

Med izseljenci je bilo največ gospodinj, ki so službovale v Trstu, z otroki, delavcev, ki so delali v ladjedelnicah, in mornarjev (Titl 1961: 17–18). Do občutnega upada števila delovne sile je prišlo, na primer, tudi v tovarni konzerv Arrigoni v Izoli, ki je leta 1946 zaposlovala 741 delavcev, dve leti pozneje pa samo 430. Pri tem je treba upoštevati, da se je ne glede na upad produktivnost celo povečala, z 802 t na 1100 t konzerv (Kramar 2002: 145–48). Kljub temu je bil upad števila industrijske delovne sile bistveno manjši kot pozneje. Pomembni obrati v Izoli, kot so zgoraj omenjeni Ampelea, Arrigoni kot tudi Mehanotehnika in Lesna galanterija, so v letih 1954–1956 izgubili do 90 odstotkov delovne sile (prav tam: 196). Izseljeval se je strokovni kader,

3 AS 1589/III, Zapisniki, poročila in drugo gradivo Tržaškega in Istrskega okrožja 1945–1950, t. e. 48, a. e. 1516, Industrija na ozemlju jugoslovanske cone STO-ja (1949), str. 1.

4 AS 1589/IV CK ZKS, t. e. 1558, Zapisniki in poročila OK ZKS Celje, Črnomelj, Gorica, Kočevje, Koper, 1954, Kratak pregled družbeno gospodarskega razvoja Slovenskega Primorja, str. 1.

5 AS 1589/III, t. e. 48, a. e. 1516, Industrija na ozemlju jugoslovanske cone STO-ja (1949), str. 2.

zlasti prosvetna inteligenca, lastniki podjetij in večji obrtniki (Titl 1961: 18). Na ta problem je že poleti 1945, ko je Lidija Šentjunc opozorila na pobege profesionalcev v takratno cono A, postal pozoren tudi CK KPS.<sup>6</sup>

Potreba po novi delovni sili je torej obstajala tudi takrat. Jugoslovanska država oziroma Slovenija takrat sicer ni imela prav veliko proste delovne sile, ki bi jo lahko administrativno napotila v Koprski okraj. Po informacijah, s katerimi je takrat razpolagal CK ZKS, je bilo v celi Sloveniji samo 3316 ljudi, t. i. »odvišne delovne sile«, ki niso bili razporejeni na delo.<sup>7</sup> Do leta 1954 je bilo investiranje v cono B zaradi nerešenega vprašanja suverenosti nezanemarljivo tveganje. Če bi ozemlje na koncu pripadlo Italiji, bi to za Jugoslavijo, ki jo je bolj kot kadarkoli pozneje pestilo pomanjkanje praktično vsega, pomenilo velikansko gospodarsko škodo. Delovne sile je takrat povsod primanjkovalo. Če bi množično naseljevali delavce iz notranjosti, bi nastopilo posebno tveganje, namreč nevarnost, da bi ti prebegnili v sosednjo Italijo. Razumljivo nam takratni dokumenti poročajo predvsem o razmislekih, kako bi bilo mogoče bolj mobilizirati oziroma izkoristiti lokalno delovno silo.

V gradivu Tržaškega okrožnega komiteja KP JK (takrat KP STO) za leto 1949 je podatek, da je bilo v Koprskem okrožju takrat zaposlenih 10.165 oseb, od katerih jih je 1250 delalo v Trstu. Po mnenju Gospodarskega odseka (najverjetneje organa KP STO) bi bilo mogoče bazen razpoložljive delovne sile razširiti tako, da bi pritegnili 400 delavcev, ki so takrat delali v Trstu, 600 oseb ženskega in 400 oseb moškega spola s podeželja, navsezadnje pa še 200 ljudi iz obalnih mest. Imenovani odsek je zlasti opozarjal, da v mestih obstaja »velika rezerva delovne sile«, ki se noče vključiti v delo, ker naj bi dobivala podporo iz Trsta.<sup>8</sup> V tem kontekstu je treba obravnavati tudi mnenje Okrajnega komiteja KP STO Koper iz leta 1950, da enoletni plan v okraju zahteva »ogromno nove delovne sile«, kot pa je razvidno iz njihovega poročila, so rešitve iskali v boljšem organiziranju delovnih (»frontnih«) brigad, ki so črpale iz lokalnega prebivalstva.<sup>9</sup>

V dokumentih iz prvih povojnih let ni sledi o zamislih, da bi dodatno delovno silo iskali v notranjosti Slovenije ali drugih delih Jugoslavije. Možna izjema je slovensko ozemlje, ki je bilo leta 1947 priključeno Jugoslaviji. Za Goriško so se takrat na najvišji politični ravni začela pojavljati razmišljanja o gospodarski integraciji v Jugoslavijo, ki so vključevala tudi mobilizacijo »prostovoljnega dela« in »mladinskih brigad«, za kar sta bila odgovorna Boris Kraigher in Ivan Maček – Matija, čeprav tudi v tem primeru ni jasno, ali so imeli v mislih predvsem lokalno populacijo ali pa morda tudi delovno silo iz notranjosti Slovenije.<sup>10</sup> Iz Slovenije so na Koprsko v tistem času poleg vojaštva

6 AS 1589/III, t. e. 1, a. e. 9–12, [Zapisnik seje CK KPS], 3. 8. 1945, str. 7.

7 AS 1589/III, CK ZKS, t. e. 43, a. e. 1454, Dnevne informacije organizacijske inštruktorske uprave CK ZKS, 25. 4. 1950, str. 4.

8 AS 1589/III, t. e. 48, a. e. 1516, Pregled delovne sile v Kopru.

9 Prav tam, Okrajni komite KP STO Koper, Poročilo, 11. 5. 1950, str. 10.

10 AS 1589/III, CK ZKS, t. e. 2, a. e. 24–167, Zapisniki sej politbiroja CK ZKS, Zapisnik seje biroja CK, 9. 7. 1947, str. 2.

prihajali skoraj izključno politični in strokovni kadri (Titl 1961: 22). »Potrebno je poslati še nove ljudi, da kontrolirajo in pomagajo pri delu,« je februarja 1946 na seji CK KPS razmišljal Ivan Maček – Matija.<sup>11</sup> Tako so denimo leta 1947 pri izvajanju agrarne reforme domačim aktivistom priskočili na pomoč geometri in administratorji iz Slovenije: 14 geometrov, sedem pravnikov, sedem zemljiškoknjižnih uradnikov in sedem administratork (Čepič 1995: 172).

Agrarna reforma in zadružništvo po sovjetskem zgledu sta bila za Partijo tudi na Koprskem politična prioriteta. Ker to ozemlje takrat še ni pripadalo Jugoslaviji, jugoslovanska zakonodaja tam ni veljala. Ustrezne predpise, ki so narekovali agrarno reformo po jugoslovanskem zgledu, so sprejeli lokalno. Problemi z neustrezno razdelitvijo zemlje, ko se je dogajalo, da družine pridobljene zemlje sploh niso mogle obdelati, ali pa z zanemarjanjem zaseženega tehničnega inventarja in s slabo založenostjo zadružnih trgovin ipd. so bili slej ko prej prisotni po vsej državi.<sup>12</sup> Velika posebnost v primerjavi s preostalo Slovenijo je bil narodnoosvobodilni ideološki element. Slovenski komunisti so namreč ugotavljali, da je fašizem v predvojnem obdobju uničil slovensko zadružništvo, tako da sta bila agrarna reforma in novo zadružništvo tedaj tudi svojevrstna poprava krivic:

Obalni pas, v katerem se nahajajo vsi veliki objekti agrarne reforme, je naseljen izključno z italijanskim življem, ker je fašizem vso dobo vladanja skrbno pazil, da slovenski človek ne bi prišel do morja. Pri dokončni ureditvi agrarnih odnosov je treba stremeti za tem, da se na večjih objektih naseli kolikor je mogoče čim več zdravega slovenskega elementa.<sup>13</sup>

Čeprav dokument iz leta 1949 eksplicitno navaja potrebo po novem poseljevanju Obale, ne pove, od kod naj bi ti novi priseljenci prišli. Pove le, kakšne naj bi bile njihove »kvalitete«. »Zdravega slovenskega elementa« v tistem času niso predstavljali kakršnikoli Slovenci, temveč samo tisti Slovenci, ki so sodelovali v protifašističnem boju ali pa so mu bili vsaj naklonjeni. Zlasti so morali biti do nove ljudske oblasti lojalni v coni B, najmanj s tem, da so hodili na volitve in niso iskali priložnosti za pobeg v Italijo, po idealnih pričakovanjih pa so se morali angažirati za priključitev cone B k Jugoslaviji.

Zastavlja se logično vprašanje, kakšen odnos je imela nova (v prvih letih po vojni še vedno začasna) oblast do italijanskega prebivalstva, ki je jeseni 1945 v Koprskem okraju predstavljajo približno polovico prebivalstva (Troha 2002: 62) in se je v petdesetih letih začelo množično izseljevati v Italijo? Slovenska zgodovinopisna stroka ne govori o tem, da bi oblasti izseljevanje načrtno spodbujale. Nove oblasti so si od vse osvoboditve prizadevale zagotoviti enakopravno zastopanost Slovencev in Italijanov v oblastnih organih. Kot opozarja Nevenka Troha, pa je slovenskim komunistom to

11 AS 1589/III, CK ZKS, t. e. 2, a. e. 24–167, Zapisniki sej politbiroja CK ZKS, Seja CK 21. 2. 1946, str. 1.

12 AS 1589/III, t. e. 48, a. e. 1516, Kmetijstvo Istrskega okrožja (1949).

13 Prav tam: 9.

težje uspevalo, ker so političnoupravne funkcije lahko dobili le politično primerni kandidati, italijansko prebivalstvo pa je novi oblasti nasprotovalo (prav tam). Kot pričajo dokumenti, si najvišji komunistični politiki tega nasprotovanja niso razlagali z nekakšno abstraktno identifikacijo z Italijo, temveč z razrednim interesom, nepremaganim fašizmom in s splošno reakcionarnostjo, kar je bilo povsem v skladu s komunistično ideologijo razreševanja nacionalnega vprašanja, v katerem je bil vselej bistven razredni moment. Po tej ideologiji je bilo logično, da je neprimerno bolje, da neko ozemlje, ne glede na nacionalno strukturo njegovega prebivalstva, pripada socialistični kot pa kapitalistično-imperialistični državi (cf. Troha 1993: 148). Jugoslavija je leta 1945 že naredila prvi korak k socializmu, kar za Italijo vsekakor ni bilo mogoče reči. »Naš Trst = sovjetski Trst,« je govoril Kardelj že leta 1944 (Godeša 2000: 178). Bojan Godeša je v navedeni analizi prepričljivo pokazal, da so slovenski in jugoslovanski komunisti na ideološki ravni brez vsakih težav kombinirali (slovenski) nacionalni in internacionalistični vidik. V tem pogledu je nadvse povedno naslednje stališče Borisa Kidriča iz leta 1946:

Koper in Piran so odločno proti nam in slabost je v tem, da slovenska okolica teh krajev ni kompaktno naseljena. Mi moramo čimbolj razbiti kompaktnost obale, odnosno njen italijanski izgled. V Kopru in Piranu so proti nam predvsem iz razrednih interesov in ni mogoče sedaj nič izpremeniti. Napaka je bila, ker proces diferenciacije ni do kraja izvršen. Niso nastopili dovolj energično proti šemi.<sup>14</sup> Okolica mora biti čimbolj aktivna, ne zganjati terorizma ampak z manifestativno močjo vplivati na ta mesta. Naši varnostni organi naj zastražijo vse hiše kjer se zbira in dela reakcija.<sup>15</sup>

Podmena Kidričevega razmišljanja je v protislovju med obalnimi mesti in njihovim zaledjem, ki so v ekonomskem smislu zaključena celota, v nacionalnem pogledu pa se cepijo na pretežno urbani italijanski in pretežno (čeprav niti približno v celoti, kot pomembno opozarja Kidrič!) na slovenski ruralni del. Tezo o nerazdružljivosti mest in podeželja je kljub različni nacionalni strukturi tik pred začetkom vojne razvil Jože Vilfan, slovenska Partija pa jo je zaradi »nacionalizma« sprva zavrnila (Godeša 2000: 174). Toda, kot je razvidno tudi iz tega Kidričevega razmišljanja, je šla po vojni še korak dlje, pri čemer se na idejnopolitični ravni ni izneverila marksizmu-leninizmu. Logika argumentacije je bila naslednja: če obalna mesta in podeželje vplivata drug na drugega na ekonomskem področju (družbena baza), bi lahko, in celo morata, tudi na političnem (družbena nadgradnja). Glede na nujnost odpravljanja fašistične raznarodovalne politike in krivic, ki so iz njih izšle, je povsem nesprejemljivo, da imajo

14 Kidrič ima tukaj v mislih Paola Semo, sekretarja piranske sekcije Komunistične partije Italije. Leta 1945 je v okviru KPJK nasprotoval priključitvi večinskega dela Julijske krajine s Trstom in z Gorico k Jugoslaviji in bil zato tudi izključen iz stranke, prav tako je bila v Piranu takrat razpuščena celotna partijska organizacija (Perovšek 1995: 93–94.) Za podatek se zahvaljujem anonimnemu recenzentu/recenzentki.

15 AS 1589/III, CK ZKS, t. e. 2, a. e. 24–167, Zapisniki sej politbiroja CK ZKS, Seja CK, 21. 2. 1946, str. 2.

obalna mesta izključno »italijanski izgled«. Ker pa se v duhu enakopravnega odnosa med narodi, ne glede na zločine političnih elit in reakcionarnega značaja buržoazije, italijanske narodne skupnosti ne sme diskriminirati, se ne sme »zganjati terorizma«, ampak svoj vpliv širiti samo z »manifestativno močjo«, vendar ne proti Italijanom nasploh, temveč samo proti njihovi reakciji. Priseljevanje slovenskega življa v obalna mesta in v njihovo neposredno zaledje je tedaj nujno in legitimno ter ne ogroža italijanske narodne skupnosti.

Zataknilo se je v praksi. Politbiro CK KPS se je leta 1949 pritoževal, da so seje okrožnega komiteja KP STO Koper v italijanskem jeziku, in to kljub temu, da je Italijan samo organizacijski sekretar, da se v Kopru 60 odstotkov vseh publikacij tiska v italijanskem jeziku, 34 odstotkov v hrvaškem, v slovenskem pa samo v šestih odstotkih; na koncu so okrožnemu komiteju očitali še to, da si ne upa organizirati festivala slovenske kulture.<sup>16</sup> Te opazke nam povedo dvoje: 1) da komunistična oblast ni zatirala italijanske kulture; zanimiv je tudi podatek, da v okrožnem komiteju sicer ni italijanskih članov, je pa Italijan organizacijski sekretar, kar je bila visoka funkcija; 2) Partijo je kljub temu še vedno motil »italijanski izgled« mesta.

Meja med »manifestativno« in dejansko močjo, ki je vključevala tudi nasilje, se je usodno zabrisala aprila 1950 med volitvami v Okraju Koper. Volitve v Ljudske odbore so bile po eni strani v coni B drugačne kot drugod po Sloveniji, saj sta poleg Slovensko-italijanske ljudske fronte vsaj formalno nastopili še Socialistična stranka STO (SS STO) in Krščansko-socialna skupina (KSS), enake kot drugod v Jugoslaviji pa v tem, da je bil cilj oblasti predvsem v zagotovitvi visoke volilne udeležbe. »[S]vetovna reakcija [je] spremenila oz. hotela spremeniti značaj naših administrativnih volitev v politične volitve [...]«, se je glasilo poročilo Sekretariata OK KP STO Koper.<sup>17</sup> Po takratnem razumevanju so »politične volitve« pomenile glasovanje, katerega izid bi vsaj teoretično lahko postavil na kocko pridobitve narodnoosvobodilne vojne in ljudske revolucije, v primeru Koprškega okraja potencialno vrnitev raznarodovalne politike na škodo Slovencev in izničenje agrarne reforme, odprave kolonata in nacionalizacije, takrat pa tudi že napore za uvedbo delavskega samoupravljanja.

Ker politične elite in buržoazija v zahodnih državah niso dopustile spremembe družbenega sistema (ekonomski in vsi tisti odnosi, ki iz njih izhajajo po avtomatizmu poenostavljene sheme o »bazi« in »nadgradnji«, tudi mednacionalni!) preko parlamentarnih volitev (diktatura buržoazije, ki je v korist manjšine), si kajpak nekaj podobnega ne sme dovoliti niti socialistična država (diktatura proletariata, ki je v korist velike večine). Iz tega je sledilo, da ljudska oblast v coni B na volitvah niti simbolično ni dovolila nastopa tistim političnim skupinam, ki bi nasprotovale priključitvi cone Jugoslaviji. Čeprav sta bili SS STO in KSS lojalni ljudski oblasti, Nevenka Troha celo ocenjuje, da sta bili krinka – zgolj videz demokratičnih volitev (Troha

16 AS 1589/III, CK ZKS, t. e. 2, a. e. 24–167, Zapisnik seje politbiroja CK KPS z dne 20. 9. 1949, str. 1–2.

17 AS 1589/III, t. e. 48, a. e. 1516, Okrajni komitej KP STO Koper, Poročilo, 5. 5. 1950, str. 1.

2002: 66), je njun nastop za to oblast najbrž pomenil izsiljeno koncesijo, kot pritisk »svetovne reakcije«.

Glede volilne udeležbe Nevenka Troha opozarja na dvoje različnih poročil: po mnenju oblasti je bila udeležba množična, druga poročila pa vsebujejo podatke o veliki volilni abstinenci v obalnih mestecih z večinskim italijanskim življem; oblasti in njeni aktivisti so jo v poznih popoldanskih urah volilnega dne popravili šele s hudimi pritiski, z grožnjami in celo s fizičnim nasiljem (prav tam). Čeprav so oblasti med volitvami dosledno govorile o razrednih nasprotnikih in reakcionarjih ter poskrbele, da so bili v organih ljudske oblasti ustrezno zastopani Italijani, je »diferenciacija«, o kateri je govoril Kidrič leta 1946, po volitvah leta 1950 precej bolj dosledno potekala na nacionalni kot na razredni ravni. To ni bil cilj komunističnih oblasti. Res je, da Koprškega okraja v tem času niso zapuščali samo Italijani, temveč tudi Slovenci in Hrvati, a na koncu vendarle ostaja nesporno dejstvo, da je Koprski okraj od oktobra 1953 do začetka leta 1958 zapustila skoraj celotna italijanska narodna skupnost; skupaj, ne glede na narodnost, je takrat odšlo 16.062 oseb (prav tam: 73–74).

V tem procesu je nujno treba upoštevati, da narodne skupnosti v Istri niso bile monolitne. Slednje sicer velja za vse narodne skupnosti. Narodnost ni prirojena človekova lastnost, niti negibna družbena danost – usoda, ki pač doleti posameznika enkrat za zmeraj, ampak je vpetost v različne institucije (kulture, politike, jezika itd.), ki se v zgodovinskih dogodkih in procesih spreminjajo, predvsem pa nimajo vselej enako pomembne funkcije za ljudi, ki jih zajemajo. V stabilnih obdobjih, tako v kapitalizmu kot socializmu, so si lahko ljudje celo privoščili, da so na te institucije vsaj začasno »pozabili« in se močneje identificirali z ožjimi skupnostmi, kot so bile vasi, soseske, delovni kolektivi, glasbene skupine, subkulture ipd. Kot opozarjajo novejši raziskave, so bili omenjeni procesi v Istri zaradi fašistične raznarodovalne politike, druge svetovne vojne in politične turbulence (neposredni vpliv hladne vojne) ter težkega povojnega ekonomskega položaja prebivalstva zlasti intenzivni. Izbrati je bilo treba nacijo. Ljudje so se bili večkrat prisiljeni opredeljevati o tem, kaj so. Po pariški mirovni pogodbi (1947) in londonskem memorandumu – Spomenici o soglasju (1954) so imeli ljudje možnost izselitve v Italijo na podlagi občevalnega jezika in starega italijanskega državljanstva. Mnogi so se odločili za italijansko »opcijo« iz povsem pragmatičnih razlogov (prim. Gombač 2005; Panjek 2011: 12–13).

## KONKRETNE ZAMISLI ZKS GLEDE PONOVNE POSELITVE KOPRSKEGA OKRAJA V LETIH 1953–1965

Do srede petdesetih let je po raziskavi Jureta Gombača na Koprsko iz notranjosti Slovenije prišlo okoli 15.000 ljudi (Gombač 2005: 89),<sup>18</sup> kar ni bil majhen priliv. Iz moje

18 Julij Titl navaja, naj bi se do leta 1954 na Koprsko priselilo 2594 ljudi, neposredno po letu 1954 pa 12.421 (Titl 1961: 22).

raziskave je razvidno, da dokumenti vodilnih, nadzornih in administrativnih organov ZKS temu pojavu niso posvečali posebne pozornosti. Prvi dokument na temo priseljevanja na Koprsko, ki nedvoumno, tj., ne več samo načelno, govori o potrebi pritegnitve ljudi na Obalo, je iz leta 1953, ko se je v Ljubljani OK ZKS Koper sestal s predstavniki CK ZKS. Na tem sestanku je Boris Kraigher povedal, da se bodo ljudje v Koper priselili, če bodo tja usmerili dovolj gospodarskih investicij. V mislih je imel predvsem ljudi s Krasa in iz drugih krajev Primorske, tistih, ki so prihajali iz notranjosti Slovenije pa ni omenjal. »Odnos do teh ljudi pa mora biti tak, da se ustvari čim širše možnosti za njihovo delo.«<sup>19</sup> O tem, kdo so bili najprimernejši kandidati za priselitev, je bila še bolj jasna Cvetka Vodopivec, ki je leto pozneje na sestanku OK ZKS Gorica navajala Kardelja, da je Koper »potrebno razvijati v takem obsegu, da se zaposli delovna sila teh predelov«.<sup>20</sup>

France Perovšek je na sestanku CK ZKS z OK ZKS Koper bolj ali manj ekonomsko-socialno funkcijo priseljevanja dopolnil s funkcijo poprave krivic iz preteklosti: »Naseljevanje Slovencev v ta mesta in zaledja je pravzaprav popraviljanje škode iz časa denacionalizacije.«<sup>21</sup> Kraigher pa je ob tej priložnosti povedal še nekaj pomembnega. Ker je šlo za čas uvajanja delavskega samoupravljanja, kar je takrat pomenilo predvsem postopno decentralizacijo gospodarstva, je poudaril, da je treba »konkretne naloge« reševanja gospodarske politike, ki jo sicer sprejemajo politični forumi, prepustiti »gospodarskemu aparatu oz. podjetjem«.<sup>22</sup> To je v praksi najverjetneje pomenilo, da so se morali poslovodni organi tovarne Ampelea v Izoli, v kateri se je v letih 1954–1956 zamenjal celotni kolektiv (odšli so vsi Italijani),<sup>23</sup> znajti predvsem sami. Povedano drugače, pritegnitev nove delovne sile, ki je vključevala tudi njeno priselitev, je bila v veliki meri njihova lastna skrb.

O pritoku delovne sile iz notranjosti Slovenije, pa tudi iz drugih delov Jugoslavije, so forumi ZK govorili tudi v kontekstu t. i. »kranjščine«, tj. konfliktov, predsodkov, v skrajnih primerih pa celo šovinizma do priseljencev. Jure Gombač se je dotaknil tega problema, ko je navedel poročilo komisije CK Ljudske mladine Slovenije iz leta 1954, ki se je seznanila z »istrskim šovinizmom«; avtohtone prebivalce so motili novi prišleki iz Slovenije, ki naj bi domačinom odjedali kruh (Gombač 2002: 89). Kdo so bili ti ljudje? Po eni strani so bili vir nezaupanja še vedno strokovni kadri, ki so na Koprsko prišli iz notranjosti Slovenije in jih zato ni bilo lahko obdržati. Na skupnem sestanku CK ZKS in OK ZKS Koper so v diskusiji poudarili, da je »Kranjce« težko obdržati zlasti zaradi slabih

19 AS 1589/III, CK ZKS, t. e. 4, a. e. 249, Zapisnik seje s člani Okrajnega komiteja ZKS Koper, 24. 7. 1953, str. 12.

20 AS 1589/IV, CK ZKS, t. e. 1588, Zapisniki in poročila OK ZKS Celje, Črnomelj, Gorica, Kočevje, Koper, 1954, Zapisnik IV. redne seje Okrajnega komiteja ZKS Gorica, 10. 8. 1954, str. 4.

21 AS 1589/III, CK ZKS, t. e. 4, a. e. 249, Zapisnik seje s člani Okrajnega komiteja ZKS Koper, 24. 7. 1953, str. 7.

22 Prav tam: 12.

23 AS 1589/IV, CK ZKS, t. e. 1566, fasc. 195, Zapisniki, poročila in analize osnovnih organizacij ZKS v podjetjih okraja Gorica, Kočevje, Koper, 1956, Konferenca Osnovne organizacije ZK v tovarni Ampelea, 30. 9. 1956, poročilo.



stanovanjskih razmer. Do njih naj bi imeli neprimeren odnos tako Slovenci kot tudi Italijani, »bolj [se jih] kritizira kot druge itd.« »Iredentistična linija je dobila zaveznike celo med nekaterimi Slovenci in sicer na vprašanje antikranjščine.«

Poleg tega naj bi ljudje po prihodu v Koper zapadli »raznim negativnim vplivom«, kot na primer »švercu, politični mlačnosti itd.«.<sup>24</sup> Rudi Avbelj pa je ob drugi priložnosti leta 1954 kritiziral OK ZKS Koper, češ da so se tako rekoč vsi, ki so na Koprsko prišli iz Slovenije, pritoževali zaradi očitno obojestranskega neprimernege odnosa. Prišleki naj bi lokalnim kadrom hoteli »pamet soliti in držati v svojih rokah«. Omenjeni so stari komunisti in celo španski borci. Avbelj ni bil zadovoljen z akcijo OK ZKS Koper proti »antikranjščini«. Izključitve iz Partije zanj niso bile dovolj. Na živce mu je šlo zabavljanje, češ da v Kopru obstaja društvo mariborskih direktorjev, »Maribor na morju«. »Po našem mišljenju to niso vici,« je sklenil Avbelj.<sup>25</sup> »Antikranjščina« pa z Avbeljevo intervencijo ni bila odpravljena. Na partijski konferenci okraja Koper, ki je bila leta 1956, se je tako ponovila ocena, da se še naprej »vodi borba proti novodošlim«, Izola pa naj bi uživala sloves »Maribora ob morju«. Kljub tem kritikam pa se ne zdi, da bi bil boj proti »antikranjščini« resna prioriteta komunistov. Zapisnik seje sekretariata OK ZKS Koper, ki je bila nekaj dni po portoroški konferenci in je obravnavala neposredne naloge, problema »antikranjščine« sploh ne omenja.

Kljub temu v petdesetih letih ni šlo več samo za strokovni kader, temveč tudi za običajne ljudi, ki so se zaposlili kot industrijski delavci. V izolski tovarni Arrigoni so leta 1956 poročali o ogromnem dotoku nove nekvalificirane delovne sile, ki so »v podjetje prinesli tudi miselnost zaostalega drobnega proizvajalca z vasi«. Slabih deset let pozneje so na Občinskem komiteju ZK Koper obravnavali podatek, da se je v občini zaradi zaposlitve leta 1963 prijavilo 2880, leta 1964 pa 2690 ljudi iz drugih jugoslovanskih republik. Problem te delovne sile naj bi bil v pomanjkljivi poklicni izobrazbi, nediscipliniranosti, slabi vključenosti v samoupravljanje, zlasti pa fluktuacija – leta 1964 naj bi zamenjalo delo oziroma odšlo drugam 2720 ljudi. Iz zapisnika je razvidno, da delovna sila prihaja povsem samoiniciativno. V primeru, ko dela ne dobijo, naj bi se pritoževali, da jih v Sloveniji pač nočejo zaposliti. Prav tako je iz zapisnika razvidno, da naj bi za politično integracijo teh ljudi skrbela predvsem podjetja.<sup>28</sup>

24 AS 1589/III, CK ZKS, t. e. 4, a. e. 249, Zapisnik seje s člani Okrajnega komiteja ZKS Koper, 24. 7. 1953.

25 AS 1589/IV CK ZKS, t. e. 1558, Zapisniki in poročila OK ZKS Celje, Črnomelj, Gorica, Kočevje, Koper, 1954, Zapisnik seje sekretariata OK ZK Koper, 3. julij 1954, str. 7.

26 AS 1589/IV, CK ZKS, t. e. 1571, fasc. 201, Zapisniki in poročila okrajnega komiteja ZKS Koper, 1956, Zapisnik I. konference Zveze komunistov okraja Koper, Portorož, 22.–23. februar 1956, str. 17.

27 Prav tam, Odgovori na vprašanja v zvezi z anketo v tovarni Arrigoni v Izoli, str. 4.

28 AS 1589/IV, CK ZKS, t. e. 1664, a. e. 173, fasc. 455, Občinski komiteji ZKS Kočevje in Koper, 1965, Zapisnik seje Občinskega komiteja ZKS Koper, 28. 5. 1965, str. 6.

## SKLEP

Leta 1965 je Luka Koper objavila razpis za 30 novih delovnih mest, na katerega se je prijavilo 105 interesentov, od teh naj bi bilo samo pet Slovencev. To je bil čas gospodarske reforme, ki naj bi v samoupravni socializem vgradila tržne mehanizme. V tem »duhu« je na Občinskem komiteju ZKS Koper padla ideja, naj se problem »odvišne delovne sile« ne rešuje z usklajevanjem med podjetji, ampak naj ga rešuje kar Zavod za zaposlovanje, »ki je za to tudi ustanovljen«. <sup>29</sup> Za pričujočo problematiko je to razmišljanje pomemben namig, da so priseljenci v tistem času na Koprsko prihajali precej spontano. Če bi obstajal jasen načrt za njihovo priselitev, problema s prostimi delovnimi mesti gotovo ne bi bilo. V vsakem primeru pa rešitelja ne bi iskali v Zavodu za zaposlovanje, temveč v kakšni močnejši instituciji.

Članek je začela dilema, ali so bile nove poselitve Koprskega okraja načrtovane. Kot sem zapisal, se v dosedanji literaturi v zvezi s tem problemom pojavljata dva različna odgovora, h katerima lahko na podlagi raziskanih dokumentov dodam ugotovitev, da na to vprašanje pravzaprav ni mogoče dati jasnega odgovora. Po postavljeni hipotezi je bil prihod strokovnjakov in političnih kadrov iz notranjosti Slovenije v prvih letih po drugi svetovni vojni nedvomno skrbno načrtovan, toda pri tem je treba upoštevati, da je bilo teh ljudi relativno malo in niso mogli zapolniti populacijske vrzeli, ki je tam nastala po družbenih pretresih. Kar zadeva prihod druge delovne sile iz zaledja primorskih mest in notranjosti Slovenije, Jugoslavije, deloma celo iz Italije, <sup>30</sup> lahko na tej točki raziskave potrdim, da so komunistične oblasti poskrbele za ideološko utemeljitev njihove priselitve in poskušale ustvariti ekonomske razmere za njihov prihod. Ker pa se je v tem času spremenil sam gospodarski model, ki je težil k decentralizaciji sprejemanja ekonomskih odločitev, se je temu prilagodila tudi alokacija delovne sile, ki je ni bilo več mogoče preprosto administrativno razporejati. In vprašanje poselitev je bilo v Koprskem okraju v bistvu vprašanje delovne sile. Priselitve industrijske delovne sile na to območje so bile tako vse od petdesetih let mnogo bolj spontane kot priselitve strokovnjakov iz prvega obdobja.

29 S 1589/IV, CK ZKS, t. e. 1664, a. e. 173, fasc. 455, Občinski komiteji ZKS Kočevje in Koper, 1965, Zapisnik posveta Občinskega komiteja ZKS Koper, sekretarjev osnovnih organizacij ZK ter nekaterih bolj razgledanih komunistov o predvidenih družbenoekonomskih ukrepih in nalogah komunistov v tej zvezi, Koper, 21. 6. 1965, str. 10 in 12.

30 V prvih povojnih letih je v Jugoslavijo prihajalo tudi precej italijanskih delavcev, po nekaterih ocenah okoli 10.000. Prihajali so bodisi zaradi simpatij do jugoslovanskega režima bodisi zato, ker so imeli v Italiji težave zaradi svojega političnega delovanja. Mnogi so po informbirojevskem sporu Jugoslavijo zapustili, vendar ni bilo malo niti tistih, ki so ostali. V Ljudski republiki Sloveniji je bilo leta 1949 1782 italijanskih delavcev in 545 državljanov STO (Troha 2000b: 262–263).

## VIRI IN LITERATURA

- Čelik, Pavle (2013). *Stražarji državne meje v Sloveniji (1918–2013)*. Ljubljana: Modrijan.
- Čepič, Zdenko (1995). *Agrarna reforma in kolonizacija v Sloveniji (1945–1948)*. Maribor: Založba Obzorja Maribor.
- Godeša, Bojan (2000). »Naš odnos do Italijanov naj bo miren in dostojen, toda nič več«: Nekateri vidiki razpetosti med nacionalnim in internacionalnim med slovenskimi komunisti na Primorskem. *Prispevki za novejšo zgodovino* XL/1, 171–180.
- Gombač, Jure (2005). *Esuli ali optanti? Zgodovinski primer v luči sodobne teorije*. Ljubljana: Založba ZRC, ZRC SAZU.
- Kalc, Aleksej (2015). Trst kot stičišče prekomorskega izseljevanja pred prvo svetovno vojno. *Dve domovini / Two Homelands* 41, 77–88.
- Kramar, Janez (2002). *Izola 1945–1991*. Koper: Zgodovinsko društvo za južno Primorsko in Znanstvenoraziskovalno središče Republike Slovenije.
- Panjek, Aleksander (2011). *Tržaška obnova: Ekonomske in migracijske politike na Svobodnem tržaškem ozemlju*. Koper: Univerzitetna založba Annales.
- Perovšek, France (1995). *Moja resnica: Spominski utrinki iz delovanja po letu 1945 na Primorskem in v Ljubljani*. Ljubljana: Društvo piscev zgodovine NOB Slovenije.
- Pletikosič, Ivica (2000). Migracije v Piranu med drugo svetovno vojno in neposredno po njej. *Annales, Series Historia et Sociologia* 1, 217–230.
- Pletikosič, Ivica (2006). Rudnik Sečovlje: Pregled migracijskih gibanj (1950–1970). *Acta Histriae* 2, 299–311.
- Titl, Julij (1961). *Populacijske spremembe v Koprskem Primorju*. Koper.
- Titl, Julij (1965). *Socialnogeografski problemi na koprskem podeželju*. Disertacija. Koper: Lipa.
- Troha, Nevenka (1993). Stališča Komunistične partije Slovenije (Komunistične partije Jugoslavije) in Komunistične partije Italije o Julijski krajini v letih 1941–1947. *Prispevki za novejšo zgodovino* XXXIII/1–2, 147–162.
- Troha, Nevenka (2000a). Ukrepi jugoslovanskih oblasti v conah B Julijske krajine in Svobodnega tržaškega ozemlja in Italijani na Koprskem. *Annales, Series Historia et Sociologia* 1, 203–216.
- Troha, Nevenka (2000b). Preselitve v Julijski krajini po drugi svetovni vojni. *Prispevki za novejšo zgodovino* XL/1, 255–268.
- Troha, Nevenka (2002). Volitve v Okraju Koper cone B Svobodnega tržaškega ozemlja. *Prispevki za novejšo zgodovino* XLII/3, 61–75.

## ARHIVSKI VIRI

Arhiv Republike Slovenije, AS 1589, Centralni komite Zveze komunistov Slovenije (CK ZKS).

## SUMMARY

### **“MARIBOR BY THE SEA”: THE LEAGUE OF COMMUNISTS OF SLOVENIA AND THE QUESTION OF THE SETTLEMENT OF THE KOPER DISTRICT 1945–1965**

Lev CENTRIH

The article deals with reflections on the settlement of the Koper District after the Second World War. Profound social dislocations after the war caused considerable change in the population structure in the territory in question. Virtually the entire Italian ethnic community, but also many Slovenes and Croats, abandoned their settlements and moved to Italy. Emigration was at its highest level in the years 1953–1958, when around 16,000 people left their homes. The archival materials investigated in our research suggest that the leading political force – the League of Communists of Slovenia (LCS) – never made a detailed plan on how to compensate for the loss of a substantial part of the population. On the other hand, the LCS regularly addressed the issue of a lack of technical personnel in factories and a lack of labour force in general, but it was focused on building a stimulating economic environment to attract workers from the countryside. The new settlements created by the Slovene population in the coastal towns like Koper, Piran and Izola also had a national-liberation function, since they were seen as corrections to the past Fascist injustices. In the first post-war years, the Koper District was mostly settled by professionals and political functionaries, who were later followed by other people from various social strata. According to our hypothesis, the communist authorities systematically encouraged settlement only during the first period, and later these processes took place more spontaneously.

# NADZOR NAD NENADZOROVANIMI MIGRACIJAMI: KAKO JE SLOVENSKO ČASOPISJE PISALO O PREBEGIH IZ JUGOSLAVIJE V LETIH 1945–1965

Jernej MLEKUŽ<sup>1</sup>

COBISS 1.02

## IZVLEČEK

### Nadzor nad nenadzorovanimi migracijami: Kako je slovensko časopisje pisalo o prebegih iz Jugoslavije v letih 1945–1965

Besedilo odgovarja na vprašanje, kako je o prebegih iz Jugoslavije v letih 1945–1965 pisalo slovensko časopisje. V obravnavanem obdobju je bilo izseljevanje iz SFRJ omejeno in nadzorovano, prebegi sankcionirani in mediji instrumentalizirani kot ideološki aparat oblasti. Prebegi niso bili tema, ki bi se je časopisje prav pogosto lotevalo. Kadar pa jih vendarle postavilo na časopisni papir, jih je kriminaliziralo in moralno obsojalo. Če je glas »prepustilo« tudi prebežnikom samim, je bil to glas obžalovanja in kesanja, s sporočilom, da odhod v tujino prinaša trpljenje, gorje ali celo pogubo.

KLJUČNE BESEDE: prebegi, časopisi, diskurz, oblast, socialistična Jugoslavija

## ABSTRACT

### Control of Uncontrolled Migrations: How the Slovenian Newspapers Reported on Defections From Yugoslavia 1945–1965

The paper addresses how Slovenian newspapers reported on defections from Yugoslavia in the period from 1945–1965. During the time when departures from the SFRY were restricted and regulated, defections were sanctioned and the media were instrumentalized as a state ideological apparatus. It seems that defections were not a very common topic in the newspapers. When they did appear in newsprint, they were criminalized and not infrequently subjected to a fair amount of moralizing. When the defectors themselves were given voice, they expressed remorse and contrition, with the message that going abroad meant suffering, misery or even ruin.

KEY WORDS: defections, newspapers, discourse, authorities, socialist Yugoslavia

<sup>1</sup> Dr. znanosti, znanstveni sodelavec, Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; mlekuz@zrc-sazu.si — Članek je nastal v okviru projekta »Nadzor nad migracijami na Slovenskem od Avstro-Ogrske do samostojne Slovenije« (ARRS, J6-8250) in raziskovalnega programa »Narodna in kulturna identiteta slovenskega izseljenstva v kontekstu raziskovanja migracij« (ARRS, P5-0070). Zahvaljujem se anonimnima recenzentoma za konstruktivne komentarje in pripombe.

## UVOD

Socialistična oblast je v obravnavanih letih strogo nadzorovala prehode državne meje, sankcionirala nezakonite prebege ter obvladovala, nadzorovala in usmerjala medije. To sta temeljni koordinati ob listanju socialističnega časopisja in iskanju odgovora na vprašanje, kako je časopisje pisalo o prebegih čez državno mejo v letih 1945–1965. Bolj učeno zapisano, v članku analiziram diskurze – partikularne načine reprezentacij, ki dajejo pomen prebegom in prebežnikom.<sup>1</sup> Kot pravi Michel Foucault (2001: 55), je diskurze treba razumeti ne le kot celote znakov, »temveč kot prakse, ki sistematično formirajo objekte, o katerih govorijo«. Diskurzi torej ne le odsevajo realnost, temveč jo tudi ustvarjajo. Kateri diskurzi so bili na delu pri pisanju o prebegih in kako so ti prebege konstituirali? In kako se tega vprašanja lotiti? S pomočjo nekaterih orodij (kritične)<sup>2</sup> diskurzivne analize sem pregledal in prečesal članke, v katerih se prebegi in prebežniki obravnavajo ali omenjajo. A pred listanjem po časopisju še nekaj o prebegih iz socialistične Jugoslavije in o mestu in vlogi časopisja v času, ko je bilo to pogosto oblečeno v besedno zvezo »sredstva javnega obveščanja«.

## Prebegi

Prebegi v obravnavanem obdobju niso bili minoren fenomen – tako v smislu števila prebegov kot ukvarjanja oblasti z njimi. Po podatkih slovenskega republiškega sekretariata za notranje zadeve je od leta 1945 do konca leta 1959 s teritorija Slovenije pobegnilo 34.256 oseb, na begu pa je bilo ujetih 26.710 ljudi. Od leta 1960 pa do konca junija 1965 je bilo 10.655 uspešnih in 6017 neuspešnih prebegov (Drnovšek 2010: 284; za podatke po posameznih letih glej Božič 2013).<sup>3</sup> Marjan Drnovšek, ki sicer svojih besed ne podkrepi z viri ali s študijami, zapiše, da je bilo izseljevanje v socialistični Jugoslaviji »občutljivo politično vprašanje«, nad katerim je bedela Komunistična partija Jugoslavije (KPJ, od leta 1952 Zveza komunistov Jugoslavije (ZKJ)) s centralnim in hierarhičnim odločanjem. Izseljevanje je oblast označevala »za posledico

1 Izrazom »ilegalna«, »nedokumentirana«, »neavtorizirana« migracija se (večinoma) izogibam. Več o problematičnosti teh pojmov glej Schrover idr. (2008: 10–12).

2 Zakaj »kritična« (diskurzivna) analiza in oklepaju? Analiza sloni na nekaterih predpostavkah in orodjih kritične diskurzivne analize, kot so na primer njena interpretativna in pojasnjevalna narava, dialektična povezanost družbe in kulture z diskurzom, zanimanje za odnos med tekstom in njegovimi družbenimi okoliščinami, ideologijami in odnosi moči (glej Wodak 1996; Richardson 2007; Erjavec, Poler Kovačič 2007 idr.). A vendarle moja analiza nima jasnih političnih ciljev in predvsem moj namen ni, da bi »resnico« osvobodil oblasti in jo tako postavil nasproti pomoti, odtujeni zavesti, iluziji, ideologiji, oziroma da bi začrtal mejo med resnico in tistim, kar spada v neki drugi red. Zato jo težko označim za kritično.

3 Marjan Drnovšek sicer podrobneje ne pojasni, ali so te številke vključevale le jugoslovanske državljane (ali celo samo registrirane v Republiki Sloveniji) ali tudi tuje državljane. Maja Božič (2013: 32) poudarja, da te številke zahtevajo pozornost, saj se enkrat nanašajo na vse državne meje hkrati, drugič na vsako posebej.

ekonomske in sovražne propagande iz tujine« in »kot pojav kapitalističnega sveta« (Drnovšek 2010: 284; glej tudi Rolandi 2015). Seveda prebegi niso (bili) značilni le za jugoslovanski socializem, ki je v prvih desetletjih po vojni izkazoval svoje geopolitične specifike. Nova era nadzora nad gibanji ljudi, ki se je že s prvo svetovno vojno vzpostavila po večjem delu Evrope, se v grobem ni bistveno spremenila niti pozneje (glej Bade 2005; Kalc 2016). Konec koncev pa je tudi današnji odnos oblasti do ilegalnih prebegov nadzorovan, sankcioniran in politično instrumentaliziran.

O odnosu oblasti do nezakonitega izseljevanja priča tudi zakonodaja. Zakon o državni meji iz leta 1947 je prestop državne meje z ustrežno listino dovoljeval samo na določenih mejnih prehodih. Kontrolo nad prestopi državne meje so izvajala obmejna poverjeništa, neposredno podrejena Ministrstvu za notranje zadeve. Za kršenje tega zakona je bil predviden odvzem prostosti ali poboljševalno delo do treh mesecev, oziroma denarna kazen, v kolikor dejanja ni bilo v kazenskem zakonu. Maja Božič (2013: 12), ki podaja zgoščen pregled zakonodaje s tega področja, piše, da čeprav nedovoljeni prehod državne meje »ni bil naveden v Zakonu o kaznivih dejanjih zoper narod in državo, je bil opredeljen kot politično kaznivo dejanje in kot kaznivo dejanje zoper oborožene sile«. Do uveljavitve Kazenskega zakonika leta 1951 so nedovoljeni prehodi državne meje, tihotapljenje ljudi čez mejo ali le poskusi teh dejanj veljali za kaznive. Z uveljavitvijo novega zakonika pa je ostal kazniv le ilegalni prehod državne meje v oboroženi, nasilni in organizirani skupini ter tihotapljenje oseb čez državno mejo. Drugi poskusi nedovoljenega prehoda ali poskusov prehoda so bili obravnavani kot prekrški (prav tam: 12–13).<sup>4</sup>

Nov odnos oblasti do izseljevanja in s tem tudi do prebegov je po besedah Drnovška (2010: 285–290) prinesel Zakon o amnestiji iz leta 1962, ki je brzkone prvi korak k liberalizaciji izseljevanja.<sup>5</sup> Marina Lukšič Hacin (1995: 37) postavi leto 1963 kot »uradno odprtje za izseljevanje«. To je namreč leto, ko je Jugoslavija podpisala sporazum o reguliranju zaposlovanja jugoslovanskih delavcev v Avstriji. V naslednjih letih so bili s številnimi drugimi kapitalističnimi evropskimi državami podpisani podobni meddržavni sporazumi, s čimer se je začelo obdobje t. i. organiziranih selitev, ki so reševale nezaposlenost in ekonomske težave v Jugoslaviji – edini socialistični državi, ki je legalizirala izseljevanje (Stare 1977: 2–12; Ronaldi 2015: 569; Lukšič Hacin 2018). Leta 1965, to leto je med drugim tudi v naslovu pričujočega članka, Josip Broz

4 Legalne možnosti prehoda so bile zajete v spisku dokumentov s področja prebivanja in gibanja v obmejnem pasu, ki ga je za interno uporabo pod strogo zaupno leta 1951 izdalo Ministrstvo za notranje zadeve LR Slovenije (prav tam: 12)

5 Z leti se je spreminjal tudi »tip« prebežnikov. Na podlagi poročil Direkcije za javno varnost Avstrije Maja Božič (prav tam: 66) piše, da so sprva prevladovali »nemški vojni ujetniki, vojaki in civilisti (1946), sledili so jim politični begunci in vojni ujetniki (1947/1948), nato politični begunci, graničarji dezertjerji, moški v starosti za vpoklic v vojsko (1949–1950) ter »gospodarski, politični begunci in avanturisti (1951–1955), ki so jim [...] sledili večinoma gospodarski begunci (1955–1960).«

– Tito v enem od svojih govorov izjavi, da ni potrebe, da bi silili ljudi, naj vztrajajo v Jugoslaviji, če jim ta ne nudi (dovolj) dela (v Novinščak 2009: 126).<sup>6</sup>

Študije o ilegalnem izseljevanju iz socialistične Jugoslavije sicer obravnavajo različne vidike: vzroke za prebege, načine prebega, starostno, republiško ali regionalno in drugo pripadnost prebežnikov (Božič 2013 za avstrijsko-jugoslovansko mejo; Šarič 2015 za Hrvaško; Jovanović 2019 za hrvaški del Istre), nadzor in represijo na meji (Čelik 2013; Vidmar 2015 za italijansko-jugoslovansko mejo, Božič 2013 za avstrijsko-jugoslovansko mejo), spomine oziroma ustno zgodovino (Strle 2009, 2016a, 2016b; Božič 2013; Nemeč 2012; Jovanović 2019), prehajanje meje socialističnemu režimu nasprotujočih »ilegalnih skupin« (Čoh Kladnik 2015). Toda z izjemo poglavja v članku Jerneja Vidmarja (2015) – ki prinaša pregled poročanja *Demokracije*, glasila Slovenske demokratske zveze iz Gorice v letih 1947–1950, in »režimske« *Nove Gorice*, predhodnice *Pri-morskih novic*, v letu 1948 – časopisno poročanje o prebegih ostaja prezrto.

## Sredstva javnega obveščanja

Že v prvih povojnih dneh so dotedanji strankarski časniki prenehali izhajati. Novo-ustanovljeni časopisi so delovali pod strogim političnim nadzorom. Bernard Nežmah (2013: 285, 280) to novo obdobje slovenskega časnikarstva opiše kot čas, ko »novinarstvo ni avtonomna profesija, ampak transmisija vladajoče politike«, ko je »novinarstvo degradirano na raven sredstva, s katerim ZK obvešča javnost« (kar naj bi bilo razvidno že na ravni poimenovanja, saj se je namesto časnikarstva ali množičnih medijev uporabljala besedna zveza »sredstva javnega obveščanja«), »ko so bili mediji instrumentalizirani kot ideološki aparat komunistične partije«, ko so mediji imeli nalogo vzgajati socialističnega človeka. Nežmah (prav tam: 277–280) s primeri pokaže, kako je novinarstvo v Jugoslaviji sledilo občasnim navodilom Josipa Broza – Tita (npr. Titov napotek o upodabljanju udarniških delavcev). Seveda ni samo jugoslovanski maršal določal, kaj in kako naj se piše. Kot nadaljuje Nežmah (prav tam: 282), »stalna topika v časnikih so bili nenehni napotki politikov, kako naj novinarji delujejo in pišejo«.

Delo novinarjev oziroma poslanstvo novinarstva je bilo, kot je s primeri pokazal Aleš Gabrič (1995: 53–57), vsaj občasno tudi predmet raznih sej različnih političnih organov (npr. politburoja in izvršnega komiteja CK KPS), kongresov (npr. ZKS) in konferenc. Izjave vodilnih politikov, ki jih navaja Gabrič, potrjujejo Nežmahov opis socialističnega »novinarja kot družbenopolitičnega delavca, ki s svojim pisanjem spravlja v življenje platforme in direktive zveze komunistov« (prav tam: 282). Edvard Kardelj je tako leta 1954 od novinarstva zahteval: »Tisk, radio itd. so dejansko borbeni instrumenti in je vse odvisno od tega, kdo jih uporablja. Zagotoviti moramo, da bodo ta sredstva služila graditvi socializma, torej tudi nalogam na področju ideološko-političnega dela«

6 Leto 1965, ki uokvirja pričujočo analizo, je torej relativno arbitrarno postavljeno, saj je bila, kot že rečeno, liberalizacija izseljevanja večletni proces, sestavljen iz serije zakonodajnih, izvršilnih, socialnih idr. sprememb, ukrepov in dogodkov.



(v Gabrič 1995: 55). Tudi moja analiza časopisja v omenjenem obdobju prikimava, da je Kardeljev koncept novinarstva v praksi deloval brez večjih odstopanj. Modelu, »ki mu je treba slediti«, se je sledilo. Socialistična oblast je torej svoj glas brez večjih šumov dobila v »sredstvih javnega obveščanja«.

Seveda pa se je odnos oblasti do medijev, kulture in drugih »zidakov nadstavbe« v obdobju 1945–1965 spreminjal. Do leta 1952 je komunistična partija izobraževalni sistem in kulturno dejavnost vodila prek komisij za agitacijo in propagando, t. i. agitpropov, ki so brez zakonskih pooblastil delovale kot vzporedna oblast in imele pri odločanju o tem, kaj se bo tiskalo, poročalo ali izvajalo, glavno besedo. Partija pa je delo uredništev časopisov in drugih kulturnih ustanov usmerjala tudi neposredno – preko svojih celic in članov. Prva ideološka odjuga, ki je nastala po ukinitvi agitpropa leta 1952, se je leta 1956 končala z ustanovitvijo ideološke komisije CK ZKS. Vodstvo ZKJ je po aferi Đilas namreč ocenilo, da je ideološka sprostitev prehuda in je ustanovilo zvezne in republiške ideološke komisije. Prehod v šestdeseta leta je prinesel do tedaj največjo ideološko odjugo, ki je bila v veliki meri posledica napetih mednacionalnih odnosov v Jugoslaviji (Gabrič 1991, 1995; Vodopivec 2006: 422–40; več o »cenzuri« v obdobju socializma – ta namreč formalno ni obstajala – oziroma o široki mreži formalnih in neformalnih cenzurnih mehanizmov socialističnih oblasti glej Režek 2010).

## METODOLOGIJA IN VIRI

Nabor člankov o prebegih iz Jugoslavije, ki mi ga je uspelo zbrati s pomočjo iskanja z geslom »prebeg« v Digitalni knjižnici Slovenije (DLIB) in pregledom *Slovenskega poročevalca* iz leta 1954, obsega skromnih 25 enot.<sup>7</sup> Gre torej za reven nabor, tako reven, da se bržkone marsikomu postavlja vprašanje smiselnosti pisanja članka s takšnim naslovom (seveda ne avtorju članka). Nedvomno pa skromen nabor onemogoča tako diahrono analizo fenomena (to seveda ne pomeni, da ob obravnavi posameznega članka ne bo nepomembno leto njegove objave) kot tudi uporabo empirične metodologije (npr. analizo vsebine). Na vprašanje, kako je socialistično časopisje pisalo o prebegih čez državno mejo, bi lahko hitro odgovorili: skromno. Ta kakovostni pridevnik, ki se nanaša na količino, zahteva metodološko pojasnilo. »Prebeg« seveda ni edina beseda, ki v časopisju opisuje raziskovani pojav. Je mogoče za skromno poročanje o prebegih krivo preveč ozko iskanje? Veljalo bi torej iskati tudi s pomočjo drugih gesel, kot so npr. »begunci«, »pobegi« idr. A težava je, da so ta gesla v veliki večini primerov povezana s članki oziroma z vsebinami, ki nimajo nič opraviti s prebegi (npr. »Pobegli lev napadel žensko, pustil le kosti«).

Da bil torej odgovor »skromno« (poročanje časopisja o prebegih) lahko pristal na nekoliko trdnejših tleh, sem dodatno prečesal *Slovenski poročevalec* iz leta 1954. A

7 V DLIB-u sem z geslom iskal novembra 2018.

zakaj ravno ta časopis in zakaj ravno to leto? Gre namreč za časopis, ki je, če zaupamo DLIB-u, v omenjenem letu kar najpogosteje pisal o prebegih (trikrat). Nove časopisne enote o prebegih iz *Slovenskega poročevalca* nam torej lahko sugerirajo, koliko člankov zgreši iskanje po omenjenem geslu oziroma koliko bi še lahko bilo člankov o prebegih. In kaj je pokazalo listanje *Slovenskega poročevalca*? Našel sem šest dodatnih člankov o prebegih (pet kratkih novic iz rubrike Še nekaj ... in en daljši članek), kar namiguje, da je člankov o prebegih verjetno nekajkrat več, kot mi jih je uspelo najti (tu je seveda tudi treba reči, da tudi DLIB ne pokriva oziroma novembra 2018 ni pokrival vsega časopisja iz tega obdobja). Še vedno pa se zdi, da ni to ni bila tema, ki se je pogosto znašla v časopisih. Besedo »se zdi« sem uporabil zato, ker »skopo pisanje časopisja o prebegih« še vedno ostaja le teza in ker je to izrazito subjektivna ocena.

Za kakšne članke pravzaprav gre? Začnimo z bolj ali manj kratkimi novicami pod naslovi raznih rubrik: »Izpred okrožnega sodišča. Za nameravani beg čez mejo ...« (rubrika Iz Celja ..., *Savinjski vestnik*, 13. december 1952), »Pobegnili v tujino in tam kradel« (rubrika Še nekaj ..., *Slovenski poročevalec*, 26. marec 1954), »Pomagali so pri pobegu čez mejo« (rubrika Še nekaj ..., *Slovenski poročevalec*, 19. junij 1954), »Le nepremišljeni ljudje iščejo srečo v tujini« (rubrika Iz naših krajev in podrubrika Iz življenja Maribora in okolice, *Ljudska pravica*, 26. junij 1954), »Tja in nazaj čez mejo« (rubrika Še nekaj ..., *Slovenski poročevalec*, 10. julij 1954), »Zaslužili so« (rubrika Še nekaj ..., *Slovenski poročevalec*, 7. avgust 1954), »Pot v lepše življenje se jima ni posrečila« (rubrika Še nekaj ..., *Slovenski poročevalec*, 15. avgust 1954), »Namesto tujine – smrt v prepadu« (rubrika Še nekaj ..., *Slovenski poročevalec*, 9. junij 1954), »Pobeg čez državno mejo« (rubrika Še nekaj ..., *Slovenski poročevalec*, 12. september 1954), »Čez mejo so hoteli uiti« (rubrika Še nekaj ..., *Slovenski poročevalec*, 27. oktober 1954), »Meja je nevarna stvar« (rubrika Izpred sodišča, *Ljudska pravica*, 3. september 1957).

Nadaljujmo z daljšimi članki oziroma s članki s samostojnimi naslovi: »Čemu gradnja doma v Jurjevici tako počasi napreduje« (*Ljudska pravica*, 14. september 1948), »Redovnice in samostan kongregacije sester sv. Frančiška Asiškega so bili opora protiljudskih elementov pri prehodih v inozemstvo« (*Celjski tednik*, 19. februar 1949), »Pobegi v soboškem okraju« (*Slovenski poročevalec*, 7. avgust 1954), »O delu sekretariata za notranje zadeve« (*Ljudska pravica*, 29. januar 1955), »Tov. Strbenkova ustvarja mučenike« (*Velenjski rudar*, 15. marec 1955), »Iz sodne dvorane. Obravnava o uboju v bohinjskih gorah« (*Ljudska pravica*, 29. avgust 1955), »Žalostna pota nepremišljenih avanturistov« (*Slovenski poročevalec*, 14. december 1955), »Postrizene peruti in polomljeni kremplji« (z nadnaslovom »Zgodba o organizatorjih prebegov čez mejo«) (*Slovenski Jadran*, 20. marec 1959), »Obsojeni organizatorji pobegov čez mejo« (*Delo*, 6. marec 1961). Članki »Čemu gradnja doma [...]«, »Redovnice in samostan [...]«, »Tov. Strbenkova ustvarja mučenike«, »O delu sekretariata za notranje zadeve« in »Iz sodne dvorane [...]« se prvenstveno ne ukvarjajo s prebegi, največkrat te le omenjajo ali obravnavajo povsem obrobno (članek »O delu sekretariata za notranje zadeve« npr. navaja le število »prijetih na naših mejah zaradi poskusa prebega« za leto 1964 (1109,

od tega 847 »povratnikov«), članek »Iz sodne dvorane [...]« pa v enem stavku navede nameravani prebeg obtoženih.

Prav tako sem v nabor vključil tudi dva članka iz sicer celovškega, jugoslovanskega režimu naklonjenega *Slovenskega vestnika*: »Drugo plat pa zamolčijo« (14. maj 1954) in »Kako dolgo bo naša država še zatočišče kriminalnih emigrantov?« (20. januar 1956). Zlasti izstopajo trije članki, v katerih imajo besedo ključni akterji pojava – torej prebežniki, čeprav ne brez uredniškega komentarja oziroma interpretacije novinarja. Vsi trije članki so opremljeni s sporočilnimi naslovi: »Nikdar več iz domovine« (*Ljudski glas*, 20. marec 1952), »Ko bi le mogla do tebe, da bi ti odkrila gorje mojega življenja« (*Obmurski tednik*, 8. januar 1954) in »Napišite vsem mladim, naj prenehajo sanjati ...« (*Slovenski poročevalec*, 18. april 1954).

Največ zbranih besedil je iz osrednjih dveh slovenskih dnevnikov, *Slovenskega poročevalca* in *Ljudske pravice* (leta 1959 ju je politični vrh združil v *Delo* (glej Nežmah 2013: 281). Z izjemo besedila »Nikdar več iz domovine« to niso članki z naslovnice, ampak z zadnjih strani, z izjemo člankov »Postrizene peruti in polomljeni kremplji« ter »Napišite vsem mladim, naj prenehajo sanjati ...« jim ni bila namenjena več kot tretjina strani. Večina časopisnih člankov je iz srede petdesetih let, kar 17 iz let 1954 in 1955 (šest člankov sem pridobil z dodatnim pregledom *Slovenskega poročevalca* iz leta 1954), zato je treba pričujoče besedilo v veliki meri razumeti predvsem kot analizo časopisnega pisanja o prebegih v omenjenih dveh letih. Ob tem se poraja vprašanje, ali je za to »s članki bogato obdobje« »kriva« omenjena ideološka odjuga, ki je nastala po ukinitvi agitpropa leta 1952 in se končala leta 1956 z ustanovitvijo ideološke komisije CK ZKS.

## ANALIZA BESEDIL

Pred nami so ne samo raznovrstna besedila iz različnih časopisov, ampak tudi besedila, ki različne diskurzivne strategije uporabljajo za spreminjanje prebegov v objekte vednosti. Začnimo s postopki in pomeni, ki prebege in prebežnike najbolj dominantno opredeljujejo.

### Kriminalizacija

V »najstarejšem« članku z naslovom »Čemu gradnja doma v Jurjevici tako počasi napreduje« (*Ljudska pravica*, 14. september 1948), v katerem so prebežniki omenjeni le v enem stavku, so za počasno gradnjo doma obtoženi »nekateri vaški mogotci« (»Najbolj delovni so seveda člani Partije in SKOJ-a.«), »ki so hoteli že med okupacijo prodati ljudstvo fašistom«: »Bili so že pred sodiščem zaradi sodelovanja z okupatorjem, prebega ali klevetanja ljudske oblasti.« Teun van Dijk (1991) tej pozitivni samoreprezentaciji in hkratni negativni reprezentaciji drugih pravi »ideološki kvadrat«. Na

delu je, kot pravita Martin Reisigl in Ruth Wodak (2001), »referenčna strategija« – ko posameznika ali skupino opišemo kot nekaj in ne kot nekaj drugega. Obtoženi »vaški mogotci« so torej opisani kot kolaboranti, klevetači in (neuspeli?) prebežniki. V nekem drugem režimu oziroma diskurzu bi bili lahko opisani kot odprti do drugih, kritični do oblasti in svobodnega duha. Izbira tem, imen, konotacij, asociacij, besedišča in drugega ima ideološki pomen.

Načini, kako so ljudje in dejanja poimenovani, pomembno vplivajo na to, kako so ljudje in dejanja v družbi razumljeni ter vrednoteni. Gre za »umazani posel« (*Slovenski poročevalec*, 19. junij 1954), »umazan podvig«, »izdajo domovine« (*Velenjski rudar*, 15. marec 1955), »grdo dejanje do rodne zemlje« (*Obmurski tednik*, 8. januar 1954), »ljudski oblasti sovražne elemente« (*Celjski tednik*, 19. februar 1949), »delomrzneže ali pa celo za več ali manj kriminalne pustolovce« (*Slovenski vestnik*, 14. maj 1954).

A vendarle, kriminalizacija – proces, s katerim dejanja postanejo kriminalna in posamezniki postanejo kriminalci (Michalowski 1985: 6) – ni le produkt referenčne strategije. Prebežniki in prebegi (pri)dobijo pomene, povezane z nezakonitimi dejavnimi in s kriminalom že s samo določitvijo oziroma izbiro makro teme ali osrednjih tem. O pojavu se namreč zelo pogosto piše v povezavi s sodno prakso in z organi pregona (in ne, recimo, z ekonomskimi idr. vzroki za prebege), o čemur pričajo že naslovi ali pa rubrike člankov: »Izpred okrožnega sodišča. Za nameravani beg čez mejo ...« (*Savinjski vestnik*, 13. december 1952), »Zaslužili so« (*Slovenski poročevalec*, 7. avgust 1954), »Meja je nevarna stvar« (rubrika Izpred sodišča, *Ljudska pravica*, 3. september 1957), »Redovnice in samostan kongregacije sester sv. Frančiška Asiškega so bili opora protiljudskih elementov pri prehodih v inozemstvo« (*Celjski tednik*, 19. februar 1949), »O delu sekretariata za notranje zadeve« (*Ljudska pravica*, 29. januar 1955), »Iz sodne dvorane. Obravnava o uboju v bohinjskih gorah« (*Ljudska pravica*, 29. avgust 1955), »Postrizene peruti in polomljeni kremplji« (z nadnaslovom »Zgodba o organizatorjih prebegov čez mejo«, *Slovenski Jadran*, 20. marec 1959), »Obsojeni organizatorji pobegov čez mejo« (*Delo*, 6. marec 1961). Okvir za pomen oziroma percepcijo članka je pogosto že rubrika, v katero je članek umeščen. Večina krajših poročevalskih prispevkov se tako znajde v rubriki Še nekaj ... – črni kroniki *Slovenskega poročevalca*, torej v družbi drugih nezakonitih, kriminalnih ali »zgolj nezaželenih« dejanj.

O prebegih se pogosto piše v povezavi z drugimi nezakonitimi in kriminalnimi dejanji. Lahko govorimo o dodatni ali komplementarni kontekstualizaciji pojava, ki je stvar avtorske ali uredniške izbire (»protikomunistična« *Demokracija* npr. je na drugi strani meje in političnega zidu pogosto kritično poročala o represiji jugoslovanskih oblasti na meji (Vidmar 2015: 132)). Včasih je ta povezava vidna že v naslovu: »Pobegnil v tujino in tam kradel« (*Slovenski poročevalec*, 26. marec 1954), »Iz sodne dvorane. Obravnava o uboju v bohinjskih gorah« (*Ljudska pravica*, 29. avgust 1955), »Kako dolgo bo naša država še zatočišče kriminalnih emigrantov?« (*Slovenski vestnik*, 20. januar 1956).

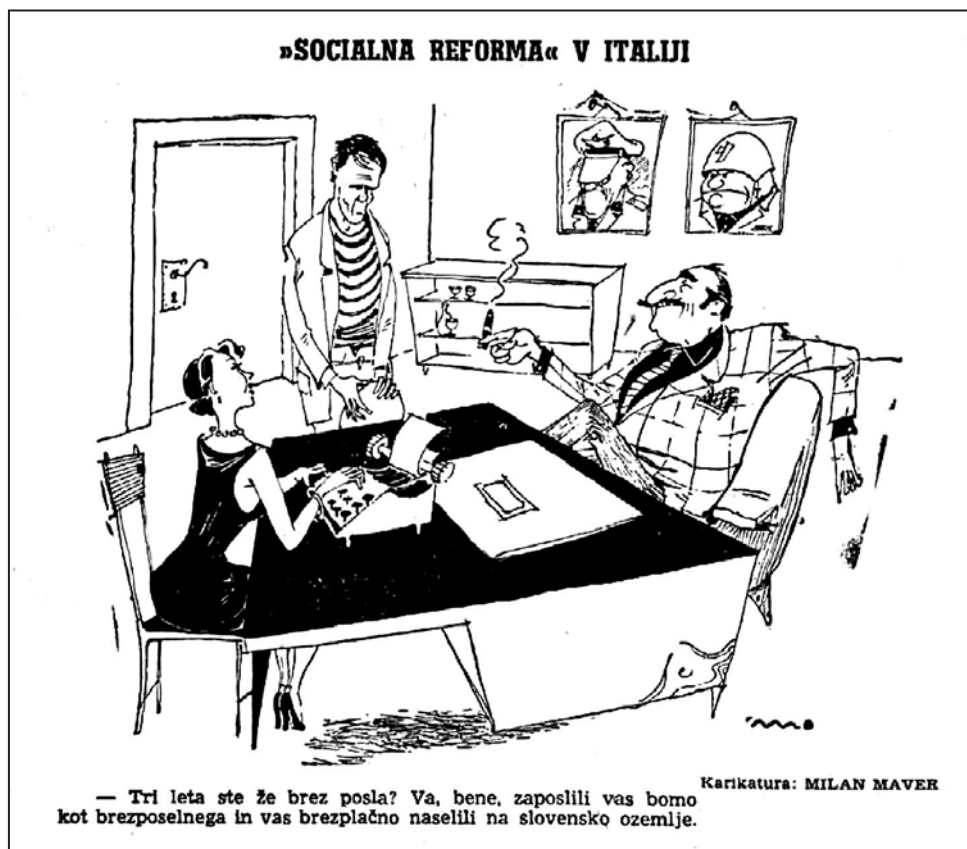
Pri pisanju o prebegih so pogosto v fokusu »organizatorji prebegov«: »Meja je nevarna stvar« (rubrika Izpred sodišča, *Ljudska pravica*, 3. september 1957), »Redovnice

in samostan kongregacije sester sv. Frančiška Asiškega so bili opora protiljudskih elementov pri prehodih v inozemstvo« (*Celjski tednik*, 19. februar 1949), »Postrizene peruti in polomljeni kremplji« (z nadnaslovom »Zgodba o organizatorjih prebegov čez mejo«, *Slovenski Jadran*, 20. marec 1959), »Obsojeni organizatorji pobegov čez mejo« (*Delo*, 6. marec 1961). V članku »Izpred okrožnega sodišča. Za nameravani beg čez mejo ...« (*Savinjski vestnik*, 13. december 1952) so prebegi povezani tudi s hujšimi kaznivimi dejanji. Vsi »obtoženci[,] skrajno sovražno razpoloženi proti sedanji ureditvi naše države«, »so se zagovarjali pred okrožnim sodiščem zaradi nameravanega pobega čez mejo v inozemstvo z namenom, da bi tam sovražno delovali proti svoji domovini«. Eden od obtoženih »je zbiral zaupne podatke, ki bi jih po prebegu priobčil pristojnim organom neke tuje države«. Prav tako se v članku »Redovnice in samostan kongregacije sester sv. Frančiška Asiškega so bili opora protiljudskih elementov pri prehodih v inozemstvo« (*Celjski tednik*, 19. februar 1949) prebegom pripisuje dodatna »politično-kriminalna« dimenzija: »Pomoč, katero so obtožene nudile prebeglim, je imela jasen cilj, da se spravi preko meje čim več ljudi, ki bodo v inozemstvu rovarili proti FLRJ.« Članek »Postrizene peruti in polomljeni kremplji« (*Slovenski Jadran*, 20. marec 1959) pa prebege – brez navajanja virov – povezuje tudi s »trgovino z belim blagom«: »Zdaj naši pustolovci izvablajo za seboj v tujino tudi dekleta, da bi na njihov račun brezskrbno živeli – kot njihovi zvodniki.«

Če se članek dotakne tudi vzrokov za prebege, so ti vedno zoženi na »nepremišljenost«, »lahkomiselnost«, »zaslepljenost« prebežnikov samih (npr. že v naslovu članka »Le nepremišljeni ljudje iščejo srečo v tujini« (*Ljudska pravica*, 26. junij 1954) ali na »lažno propagando« (npr. »nekaterih političnih emigrantov« v članku »Obsojeni organizatorji pobegov čez mejo« (*Delo*, 6. marec 1961). Nikoli se v člankih ne pojavijo vzroki za prebege, ki bi lahko tako ali drugače očrnili oziroma omajali pozitivno podobo jugoslovanskih oblasti in jugoslovanskega režima (npr. ekonomski vzroki, strah pred režimom itd.).

Partikularni načini reprezentacije fenomenov oblikujejo njihov poseben pomen. Stvari, pojavi, dejanja dobijo pomen in postanejo objekti vednosti le znotraj diskurza. S tem, ko se o prebegih piše predvsem v povezavi z nezakonitimi dejanji, se jih kriminalizira, konstruira kot problematične in s kriminalom povezane fenomene ter se jim odvzame druge pomene. Prebegi so bili še marsikaj drugega kot nezakonita, kriminalna dejanja. A ta marsikaj v časopisju ne pride do besede. Ena od temeljnih značilnosti diskurza – tudi časopisnega diskurza o prebegih – je torej izključevalnost. Kot poudarja Mladen Dolar (1991: VXI), moramo diskurze tako razumeti »kot nekaj v sebi prelomljenega«, neprestano moramo opazovati, kaj so za svojo vzpostavitev morali izbrisati ali zavreči. Razumevanje diskurzov torej zahteva tudi analizo neizjavljenega, ali kot pravi Dolar (prav tam: VXII), »ne le merjenje teže izjav, temveč teže molka«. Izločanje bržkone najbolj jasno, neposredno kaže na to, da diskurzov ne moremo razumeti brez analize oblasti. Diskurz, kot pravi Foucault (1991: 4), se »na videz izdaja za nekaj malenkostnega, a prepovedi, ki ga zadenejo, odkrijejo zelo zgodaj,

zelo hitro njegovo zvezo z željo in oblastjo«. Teža molka, ki pritiska na prebege kot mora na možgane živih, je seveda teža socialistične oblasti.



Fotografija 1: Politična propaganda, selitve in slika Mussolinija na steni  
(vir: *Ljudska pravica*, 25. julij 1953).

Izbira, kaj bo in kaj ne bo napisano, kot tudi izbira imen, konotacij, asociacij, besedišča idr., je pogosto namenjena tudi bolj eksplicitni in artikulirali politični propagandi. Piše se »o »raju« na oni strani in težkem življenju, ki čaka človeka-tujca onkraj meje, če nima dela – in tega nima, ker ga manjka še za domačine – ali če se mora plaziti tujcu pod nogami za košček trdega kruha« (*Slovenski Jadran*, 20. marec 1959). V članku »Obsojeni organizatorji pobegov čez mejo« (*Delo*, 6. marec 1961) pa se »politična propaganda« znajde tudi v besedilu samem: »Večino jih je zaslepila lažna propaganda nekaterih političnih emigrantov, ki so jim direktno ali po kom drugem tvezili o lahkem zaslužku in udobnem življenju v tujini.« V prispevku »Le nepremišljeni ljudje iščejo srečo v tujini« (*Ljudska pravica*, 26. junij 1954) pa politična propaganda sloni na »analizi prebegov« – kot v številnih člankih o prebegih brez sklicevanj na vire:

Zavednost ljudi ob meji potrjuje tudi analiza prebegov. Skoraj ni primera, da bi človek, ki je imel dovoljenje za prehod čez mejo, ostal v Avstriji. Takšni ljudje bi namreč imeli več možnosti živeti v Avstriji. Takšni ljudje bi namreč imeli več možnosti ostati v Avstriji – če bi bilo res tako dobro, kot nekateri sanjajo – ker imajo tamkaj del premoženja. Pa jih ne mika ostati tam, ker prav dobro poznajo gospodarske razmere. Skoraj vse prebežnike iz obmejnih krajev pa je lahko razvrstiti v dve skupini: v prvi skupini so mladi, lahkomišelnih ljudi, ki sanjarijo o potovanjih in avanturah. V drugi pa so ljudje, ki bežijo pred kaznijo ali družino, ki bi se je radi otresli.

V prispevku imamo opraviti s predpostavljanim – z zdravorazumskim in implicitnim postavljanjem trditev, ki je pogosto pri pisanju o prebegih. Tipizacija prebežnikov iz obmejnih krajev je zapisana kot samoumevna in nesporna (»je lahko razvrstiti«), čeprav nikjer v članku ne izvemo, na čem sloni.

## Moraliziranje

Tomo Korošec (1998: 12) poročevalska besedila deli na tista, katerih namen je predvsem prenesti sporočilo, torej informirati, in tista, ki stik z naslovnikom vzpostavlja jo z vplivanskimi, apelnimi in vrednotilnimi sredstvi (glej tudi Košir 1988: 63; Kalin Golob 1999). V katero skupino torej sodijo članki o prebegih? Seveda od članka do članka različno. A vendarle, tudi besedila, ki se »izdajajo« za »informativna«, pogosto vrednotijo in prepričujejo. Informativno funkcijo besedila tako pogosto spremlja ali celo preglasi interpretativna. Če se zadržimo še nekoliko pri prejšnjem naslovu – kratka suhoparna poročila o kaznih za prebege ali sodelovanja pri prebegu so pogosto obarvana z vrednostnimi sodbami. Kazni so tako nemalokrat opisane kot »pravične« (*Celjski tednik*, 19. februar 1949; *Ljudska pravica*, 3. september 1957 idr.).

V pisanje o prebegih je pogosto vpleteno izražanje moralnih sodb. Kot sem že omenil, je to »grdo dejanje do rodne zemlje« (*Obmurski tednik*, 8. januar 1954); »umazani posel« (*Slovenski poročevalec*, 19. junij 1954), »umazan podvig«, »izdaja domovine« (*Velenjski rudar*, 15. marec 1955). In prebežniki so »ljudski oblasti sovražni elementi« (*Celjski tednik*, 19. februar 1949), »delomrzneži ali pa celo [...] več ali manj kriminalni pustolovci« (*Slovenski vestnik*, 14. maj 1954).

Moraliziranje pa se ne izvaja samo s pomočjo »referenčne strategije« – opisovanja posameznikov ali skupin in njihovih dejanj kot negativnih, neprimernih, ogrožajočih. Časopisni članki preoblikujejo dogodke v smiselne pripovedi in oblikujejo časopisno besedilo kot zgodbo. Dogodki v teh novinarskih zgodbah dobijo vlogo moralnih dejanj. Odvija se drama med dobrim in zlim. Takšna drama med dobrim in zlim se odvija v celostranski reporterski zgodbi »Postrizene peruti in polomljeni kremplji« (*Slovenski Jadran*, 20. marec 1959) z nadnaslovom »Zgodba o organizatorjih prebegov čez mejo«. Po podrobnem opisu dejavnosti »organizatorjev prebegov« – »postopačev«, ki bi radi »na lahek način prišli do denarja s tem, da bi še druge spravili

v nesrečo« – ti končajo »na varnem« in so »deležni zasluženega plačila po Kazenskem zakonu FLRJ«: »Pravica je zamahnila z mečem in dodelila: 15 mesecev strogega zapora ...« Zgodba pa s tem še ni končana: »Zdaj je na meji spet mir. Vendar pa je črta hudo mikavna za pustolovske narave, ki kaj rade zaidejo na pot zločina. Zato so naši graničarji, varuhi naših meja, vedno budni in previdni.«

Drugi primer »moralne zgodbe« in dramatizacije s hiperbolo v naslovu je članek »Tov. Strbenkova ustvarja mučenike« (*Velenjski rudar*, 15. marec 1955). Seveda pa prekomerno pretiravanje ni omejeno le na naslov, kot tudi hiperbola ni edini uporabljene retorični trop (odklon od značilnega pomena besede ali slogovno zaznamovana raba besed v prenesenem ali zamenjanem pomenu). Pretiravanje je doseženo tudi s pomočjo emocionalnega pisanja, s katerim pri bralcih dosežejo čustven odnos do sveta oziroma obravnavanih fenomenov. V članku, ki sicer ne govori posebej o prebegih, je pa prebeg povod za zgodbo, bogato cvetijo metafore in metonimije:

Julija lansko leto se je skregal s kruhom in družino kopač iz našega rudnika X [odstranjen priimek] Alojz, izdal domovino, kjer je zaslužil povprečno po 19 do 20 tisoč dinarjev mesečno in pobegnil preko meje. Pri tem umazanem podvigu mu je nudila vso moralno (morda tudi dejansko?) podporo njegova dična soproga.

Članek nadaljujejo »dejstva«:

To so dejstva, ki bi jim bilo treba dodati le še eno in sicer, da je Korbar stanoval v komfortnem stanovanju novozgrajenega petorčka v Novem Velenju. Po Korbarjevem prebegu se je rudniška stanovanjska komisija postavila na edino pravilno in razumljivo stališče, da njegova žena z dvema otrokoma ne more ostati v velikem, novem stanovanju, ki jih naša skupnost gradi za pridne in poštene rudarje (ne dezertarje), temveč, da jo bo treba preseliti v manjše, enosobno stanovanje v baraki.

»Dična soproga« »dezertarja« se je morala izseliti iz stanovanja; članek nato s podrobnimi in z bogatimi retoričnimi tropi opisuje težave, ki sicer nimajo nič opraviti s prebegi, zato jih bom pustil na miru.

## Obžalovanje

Tudi ko v ospredju nista kriminalizacija ali moraliziranje, gre za izključno negativne zgodbe in izkušnje. Tako recimo članek »Žalostna pota nepremišljenih avanturistov« (*Slovenski poročevalec*, 14. december 1955) navaja zgolj nesrečne zgodbe prebežnikov iz Jugoslavije v Avstriji, piše o njihovih »povratkih v Jugoslavijo« in zaključí: »Taka so žalostna pota nepremišljenih avanturistov. Z velikimi utvarami in fantazijo čez mejo in nato v kratkem skesani in razočarani nazaj ali pod vsakim pogojem naprej, v tujino, v novo negotovost ...« Prebežniki so tako lahko kolektivizirani (strategija pripisovanja



eksplicitnega ali implicitnega pomena skupini, glej Richardson 2007: 50) oziroma reprezentirani tudi kot »lahkomiselni« (*Ljudska pravica*, 26. junij 1954; *Slovenski Jadran*, 20. marec 1959), »nepremišljeni ljudje, ki iščejo srečo v tujini« (*Ljudska pravica*, 26. junij 1954), »puhloglavci«, »lahkomiselni«, »prevarani« (*Slovenski Jadran*, 20. marec 1959). Prebežniki torej niso vedno kriminalizirani in moralno obsojani, temveč je za njihovo »nesrečo« kriva »lahkomiselnost«, »nepremišljenost«, »prevaranost«, čemur pogosto sledijo razočaranje, obžalovanje ali celo poguba. V članku z naslovom »Postrižene peruti in polomljeni kremplji« (*Slovenski Jadran*, 20. marec 1959) je v besedilu ob sliki »faksimila pisma, ki so ga naši obmejni organi dobili pri junaku, kateremu se je prebeg čez mejo ponesrečil«, tako med drugim tudi preberemo: »Marsikatero lahkomiselno dekle verjame lepim besedam in nasede sladkemu vabilu. Če se kateri tudi posreči priti v tujino, jo tam čaka grozno razočaranje: podrla se je hiša iz kart in življenje neusmiljeno peha prevaranega dekleta na pot pogube.«

Razočaranje in obžalovanje pa sta osrednji niti treh člankov, v katerih je dan glas tudi prebežnikom samim. Članki že z naslovi napovedujejo njihovo nepremišljenost in skesanost zaradi storjenega. Gre za poseben žanr, ki bi ga lahko poimenovali »obžalovanja« ali »obžalovanja razočarancev«.

Članek »Nikdar več iz domovine« (*Ljudski glas*, 20. marec 1952) začenja uredniški komentar: »Tako sta izjavila Jože X in Jože Y iz [...], ki sta letos v januarju pobegnili v Avstrijo, od koder sta nameravala nadaljevati pot v Ameriko.« Skesanca »sta mislila, da v tujini z odprtimi rokami čakajo na take begunce in jih brez nadaljnega pošiljajo v »obljubljeno« deželo. Ko pa sta na lastni koži občutila dobrodušnost tujine, sta bila razočarana in se vrnila že naslednji mesec [...].« V nadaljevanju besedo dobita prebežnika, ki opisujeta »gostoljubnost tujine« oziroma življenje v begunskem taborišču: zelo slabo in pičlo hrano (brez pribora), mraz, delovno izkoriščanje in nezaželenost med domačini (o odnosu avstrijskih oblasti in javnosti do prebežnikov glej Božič 2013: 6. poglavje).<sup>8</sup> Članek konča komentar:

»Najino pustolovstvo se več ne bo ponovilo!« izjavljata oba, »kajti dovolj lakote, mraza in zapostavljanja sva pretrpela v enem mesecu«. Ko poslušamo takšne doživljaje mladih ljudi, ki so s prebegom čez mejo hoteli najti boljše življenje, ugotavljamo, da za vzgojo naše mladine moramo vložiti še več truda in jih vzgajati v resnične patriote in dosledne borce za izgradnjo socializma v naši domovini. Mnogokrat so takšni prebegi mladih ljudi posledica slabe vzgoje in so v pogostih primerih prav starši krivi takih pustolovščin svojih otrok. Zato, starši, vzgajajte svoje otroke v ljubezni do svoje domovine, pa se takšni primeri ne bodo dogajali.

Članek »Ko bi le mogla do tebe, da bi ti odkrila gorje mojega življenja« (*Obmurski tednik*, 8. januar 1954) se začne z besedami pisca članka: »Še pred meseci, ko je živela

8 Po preiskavi v prehodnih avstrijskih taboriščih je prebežnike čakala različna usoda: nekatere so poslali v taborišča za izseljence, drugim so posredovali zaposlitev, tretje so zavrnil, četrte odpustili k sorodnikom v Avstriji (Božič 2013: 46).

med svojci in prijateljicami, ni rekla tega Marija X, mlado dekle, doma iz [...]. Zdaj bi rada razkrila svoje gorje prijateljici, zdaj, ko primerja svoje bedno življenje v tujem taborišču s prijetno domačnostjo, ki jo je imela v svoji rodni zemlji. Imela – toda ne cenila dovolj.« Po kopici »avtorjevih« vprašanj in odgovorov, besedilo povzame Marijino pisanje:

Avstrija jo je sprejela tako, kakor vse njej podobne. Iz taborišča v taborišče; v borbi za najtrši košček kruha, za borno skorjo s krvavimi žulji od delodajalca do delodajalca – v deželi, kjer je toliko brezdelnih domačinov. Da, trda je borba za šiling, za nekaj, kar se je zdelo prej lepo in lahko dosegljivo – a kar v resnici ne obstaja. Toda spoznanje je prišlo žal prepozno, po storjenem prepovedanem koraku. Marija X je nekaj časa pisala domov, kako ji gre dobro, kako je vse lepo v Avstriji. Pisala je tako, kot marsikdo, ki hoče prikriti sramoto, ki si jo je sam povzročil; sram ga je povedati, priznati, da je storil grdo dejanje do rodne zemlje – a sebi škodo, nesrečo. Dolgo ni hotela priznati, končno pa jo je le strlo.

Nato besedo prepusti sestri in skesani prebežnici:

Ljuba moja Marija!

Oprosti mi da Ti nisem tako dolgo pisala. Veš, kako je, če je človek tak siromak, da nima niti šilinga zase; taki siromaki smo mi tu v Avstriji.

Ljuba Marija! Vem, da mislite, kako gre nam zelo dobro. Toda jaz ne bi nikomur priporočala življenja, kakršnega imam; ničesar ne moreš zaslužiti, le trpeti moraš.

Draga moja Marija, zdaj Ti bom opisala vse, kako živimo tu v Avstriji. Ne morem več zdržati, ne morem Ti več lagati, da mi gre dobro, zato ker to ni res. Najboljše je doma, vedno boljše kot v tujini. Človek, ki je zdrav, komaj vzdrži tukaj, a kaj oni, ki so bolni. Če le malo zbolíš, si izmeček, ki ne more nikamor. A kako naj živi potem tak siromak? Prosim te, povej vsem drugim, naj nihče ne poizkuša tega, kar sem storila jaz, naj si nihče ne želi avstrijskih taborišč. Vsi, ki pišejo, da jim gre dobro, govorijo neresnico, ne verjemite tega. Jaz, draga moja, Ti pa želim povedati resnico, želim, da jo zveš in povej jo tudi moji sestri, reči ji, naj ne stori niti koraka čez mejo, naj sploh ne misli na Avstrijo. Prosim Te, povej našim doma, jaz ne morem vsem pisati, nimam denarja. Zdaj nikjer ne delam, v taborišču sem, trpeti moram kar je.

Ljuba moja Marija! Ko bi le mogla zdaj do Tebe; odkrila bi Ti vse gorje svojega življenja, ki sem ga deležna tu, v tujini.

Pozdravljam Te in prosim, oprosti ml, da Ti tako poredko pišem. V taki revščini sem, da nimam denarja niti za pisma.

Marija X lager Asten, Avstrija

Tako piše Marija X iz [...], zdaj begunka v Avstriji, svoji prijateljici Mariji X v Veliko Polano. Odkriva ji prepozno spoznanje, da je skromen dom vreden mnogo mnogo več kot ves blišč tujine.

»Skromen dom, vreden mnogo mnogo več kot ves blišč tujine« pa je tudi osrednje prizorišče (ali kar junak?) naslednjega besedila iz žanra »obžalovanja«. Enako kot v prejšnjih dveh člankih ima tudi v besedilu »Napišite vsem mladim, naj prenehajo sanjati ...« (*Slovenski poročevalec*, 18. april 1954) prebežnik ime in priimek, je torej individualiziran, s čimer se poudari njegove običajne poteze (glej Richardson 2007: 50) in bržkone utrdi tudi verodostojnost članka (ki marsikomu verjetno ostaja vprašljiva). Članek začne opis čustev, ki so Petra preplavila »doma, doma na toplem in varnem«, ko je »prestopil mejo pri Gorici«. Sledita nekakšen povzetek in sporočilo članka: »Ni se vrnil bogat, kakor je sanjal pred odhodom. Prišel je praznih rok, s skesanim, a srečnim srcem in truden na duši in na telesu. Ne, Peter ne pojde nikoli več od doma. Vse, kar je preстал od tistega dne. Ko je pobegnil, ga je ozdravilo in streznilo za vselej.« Nato v članku dobi besedo Peter:

»Da, kako je bilo ... Dneve in noči bi lahko pripovedoval, pa bi mi morda ne verjeli. Vse to je treba doživeti, poskusiti ... Nikomer ne privoščim. Na kratko vam bom povedal to svojo zgodbo. Truden sem na smrt. A če boste pisali o tem«, je v hipu vzplamtel iz utrujenosti, »potem napišite vsem mladim, ki sanjajo o tujini, naj prenehajo sanjati. Doma naj ostanejo, da ne bodo stokrat na dan prekleli tistega dne, ko so prestopili mejo. Prav kakor sem ga jaz klel. Doma naj ostanejo in delajo naj. Napišite, da sem dejal to jaz Peter X, ki sem izkusil tujino ...«

Članek nato servira »življenjsko zgodbo, polno težkih izkušenj in bridkih razočaranja«: »Kot v filmu so nam hitele pred očmi slike iz življenja ubežnika in brezdomca, ki je iskal v tujini svojo sanjsko deželo, našel pa jo je šele zdaj, ko se je vrnil.« Petra je v tujino zvabil »prijatelj«, prišla jih je italijanska policija in »odgnala v emigrantsko taborišče« in »tu se je Petru prvič porušil svet ...«: »smrdljive barake«, »lačni, strgani in boski« taboriščniki, »[k]akor živali v kletkah«, »štrajki taboriščnikov«, »lakota in mraz«, samomori »iz obupa« idr. Potem se je »vkrcał med množico belega blaga – 1300 nesrečnikov vseh narodnosti na poti v Avstralijo«, kjer so »[r]esnico kmalu spoznali, in še kako bridko«. »Prihajali so farmerji, spet kakor v na sejme s sužnji v davnih časih; razvrščene v vrstah so nas otipavali kakor živino ocenjevali naše delovne zmožnosti.« Toda večkrat so ga »izvrgli« in »zaman je hrepenel po delu, zaslužku in prostosti«. Ponovno ga je čakalo taborišče in s tem »lakota«, »štrajki zaradi lakote«, samomori taboriščnikov, ki so bili »kakor pobesnena živina«, »obup[, ki] je bil resnični gospodar taborišča«. Petra je »končno najel za delo farmer«, kjer je »bilo nevzdržno v najbolj grobem smislu«. »Kakor živina [so] garali od jutra do noči. Ljudje so umirali od žeje«, »strupenih kač in zveri«. Od tu je »ves obupan pobegnil na svojo pest iskat dela in zaslužka«. Nato je zamenjal več poklicev, kjer pogosto ni zaslužil niti za hrano, leta »stradal«, »[n]obeno prisilno delo bi ne moglo biti trše in strožje«. »Že od prvih dni je Peter hrepenel po vrnitvi« in s pomočjo konzulata, ki mu je šel »na roko«, se je vrnil domov. Svojo izpoved konča: »Še nikoli nisem tako ljubil te naše zemlje, kakor jo ljubim sedaj ...« Članek sklene avtor članka:

Tako se je Peter X vrnil domov, čez mero dozorel in postaran, a za vedno ozdravljen. Nikoli več ne pojde v tujino in nič več ne bo sanjal o čudežnem življenju v svetu. Danes ve – vse njegovo bogastvo je v odkritem in poštenem srcu in delovnih rokah, ki bodo doma z vse drugačno ljubeznijo prijele za delo. Nikogar od svojih nima, ki bi ga čakal, sprejel ob povratku. Brez očitkov, kazni in posmeha ga je sprejela – domovina.

V žanr »obžalovanja«, ki pogosto seže po melodramatičnih vzorcih (z namenom, da bralci do opisanih fenomenov vzpostavijo čustven odnos), sodi tudi članek »Grenak in pičel je kruh v tujini ...« s podnaslovom »Viktor X se je po devetih letih vrnil domov« (*Slovenski poročevalec*, 21. april 1954). Toda prispevek lahko le pogojno uvrstimo v sklop člankov o prebegih, saj je »skesanca« Viktorja v »tujino potegnil« »paničen beg domobrancev pred partizansko vojsko maja 1945«.

## ZAKLJUČEK

Sredstva javnega obveščanja (ki so brez večjih šumov širila glas socialističnih oblasti) so o prebegih, kot se zdi (»se zdi« zato, ker sem dobil vpogled le v po obsegu nedefinirani del besedil o prebegih in ker je to izrazito subjektivna ocena), najraje molčala. Ko pa so o njih vendarle pisala, so jih kriminalizirala in se jih nemalokrat lotevala z dobro mero moraliziranja. V kolikor so glas »prepustila« tudi prebežnikom samim, je bil to glas obžalovanja in kesanja, s sporočilom, da odhod v tujino pomeni trpljenje, gorje ali celo pogubo. Do takšnih zaključkov sem prišel na podlagi skopega nabora člankov in interpretativne metodologije. Razširjeni nabor besedil člankov pa bi v interpretaciji nekoga drugega najbrž prinesel drugačne ugotovitve in vpogled (npr. jasnejšo navezavo spreminjanja političnega vzdušja v 20-letnem časovnem izseku na empirične podatke oziroma posamezne članke).

Članek bi bilo smiselno oplemenititi tudi z dodatnimi uvidi oziroma preverjanji, ki sem se jim zaradi znanih prostorsko-časovnih omejitev izognil. Koliko splošnega se pri obravnavani temi na obravnavanem prostoru nakazuje skozi daljši časovni izsek, predvsem kakšne so bile kontinuitete glede na obdobje med obema vojnama? Katere odtenke političnoideološkega črnila so o beguncih prelili onstran meje, ki je bila med hladno vojno tudi jasna ideološka ločnica? Kako so bili prebežniki prikazani v medijih »končnih« destinacij in koliko politične instrumentalizacije je bilo v prikazih zaznati? Tako bi članek ob analitičnih »kajih« v zvezi s pisanjem o prebegih prikazal tudi sintetične »zakaje«, ki so pisanje jugoslovanskih (torej slovenskih) medijev pogojevali.<sup>9</sup> »Nadzor nad nenadzorovanimi migracijami« zato nikakor ni povsem izpričana zgodba.

9 Celotni odstavek je v veliki meri prepis komentarja anonimnega recenzenta, ki ga seveda ne morem citirati, se mu pa zanj iskreno zahvaljujem.

## LITERATURA

- Bade, Klaus J. (2005). *Evropa v gibanju: Migracije od poznega srednjega veka do danes*. Ljubljana: \*cf.
- Božič, Maja (2013). *Prebežniki v Avstrijo 1945–1961*. Magistrsko delo. Univerza v Ljubljani.
- Čelik, Pavle (2013). *Stražarji državne meje v Sloveniji (1918–2013)*. Ljubljana: Modrijan.
- Čoh Kladnik, Mateja (2015). »Bande« in slovenska emigracija v avstrijskih begunskih taboriščih 1945–1949. *Dve domovini / Two Homelands* 41, 101–112.
- Dolar, Mladen (1991). *Spremna beseda. Vednost – oblast – subjekt* (Michel Foucault). Ljubljana: Krt.
- Gabrič, Aleš (1991). *Slovenska agitpropovska kulturna politika: 1945–1952*. Ljubljana: Mladika.
- Gabrič, Aleš (1995). *Socialistična kulturna revolucija: Slovenska kulturna politika 1953–62*. Ljubljana: Cankarjeva založba.
- Erjavec, Karmen, Poler Kovačič, Melita (2007). *Kritična diskurzivna analiza novinarskih prispevkov*. Ljubljana: Fakulteta za družbene vede.
- Foucault, Michel (1991). *Vednost – oblast – subjekt*. Ljubljana: Krt.
- Foucault, Michel (2001). *Arheologija vednosti*. Ljubljana: Studia Humanitatis.
- Jovanović, Igor (2019). *Illegal Migration from the Croatian Part of Istria from 1945 to 1968*. *Dve domovini / Two Homelands* 49, 181–179.
- Kalc, Aleksej (2016). *Nadzor migracijskih gibanj in migrantov: Pogled v zgodovino*. *Dve domovini / Two Homelands* 43, 23–34.
- Kalin Golob, Monika (1999). *Publicistika in poročevalstvo*. *Slavistična revija* 47/2, 179–94.
- Korošec, Tomo (1998). *Stilistika slovenskega poročevalstva*. Ljubljana: Kmečki glas.
- Košir, Manca (1988). *Nastavki za teorijo novinarskih vrst*. Ljubljana: DZS.
- Michalowski, Raymond J. (1985). *Order, Law and Crime: An Introduction to Criminology*. New York: Random House.
- Lukšič Hacin, Marina (1995). *Ko tujina postane dom: Resocializacija in narodna identiteta pri slovenskih izseljencih*. Ljubljana: Sophia.
- Lukšič Hacin, Marina (2018). *Selitvena dinamika slovenskega prostora v zgodovinski perspektivi*. *Dve domovini / Two Homelands* 48, 55–72.
- Nežmah, Bernard (2013). *Časopisna zgodovina novinarstva: Na Slovenskem med letoma 1797–1789*. Ljubljana: Študentska založba.
- Novinščak, Karolina (2009). *The Recruiting and Sending of Yugoslav »Gastarbeiter« to Germany: Between Socialist Demands and Economic Needs*. *Transnational Societies, Transterritorial Politics: Migrations in the (Post-)Yugoslav Region 19th-21st Century* (ur. Ulf Brunnbauer). Munich: Oldenbourg, 121–143.
- Schrover, Marlou, Van der Leun, Joanne, Lucassen, Leo, Quispel, Chris (2008). *Introduction: Illegal Migration and Gender in a Global and Historical Perspective*. *Illegal Migration and Gender in a Global and Historical Perspective* (ur. Marlou Schrover,

- Joanne van der Leun, Leo Lucassen, Chris Quispel). Amsterdam: Amsterdam University Press, 9–38.
- Reisigl, Martin, Wodak, Ruth (2001). *Discourse and Discrimination: Rhetorics of Racism and Antisemitism*. London: Routledge.
- Režek, Mateja (ur.) (2010). *Cenzurirano: Zgodovina cenzure na Slovenskem od 19. stoletja do danes*. Ljubljana: Nova revija.
- Richardson, E. John (2007). *Analysing Newspapers: An Approach from Critical Discourse Analysis*. New York: Palgrave Macmillan.
- Rolandi, Francesca (2015). Heading Towards the West: Yugoslav Asylum Seekers in Italy (1955–1968). *Acta histriae* 23/3, 555–574.
- Stare, Franci (1977). *Organiziranje zunanje migracije Slovencev*. Ljubljana: RI FSPN.
- Strle, Urška (2009a). Bila je preprosto sreča, da sem prišla v Kanado: O razlogih za selitve skozi Stankino življenjsko zgodbo. *Krila migracij: Po meri življenjskih zgodb* (ur. Mirjam Milharčič Hladnik, Jernej Mlekuž). Ljubljana: Založba ZRC, ZRC SAZU, 89–117.
- Strle, Urška (2009b). »Pustili so vse in čez noč odšli«: Prispevek k izseljevanju iz Posočja v Italijo po drugi svetovni vojni v luči ustnih pričevanj. *Zgodovina za vse* 1, 113–129.
- Strle, Urška (2016). Go West! Illegal Postwar Migrations from the Soča Region in the Light of a Case Study. *Qualestoria* 44/1, 27–46.
- Šarič, Tatjana (2015). Bijeg iz socijalističke Jugoslavije – ilegalna emigracija iz Hrvatske od 1945. do početka šezdesetih godina 20. stoljeća. *Migracijske i etničke teme* 31/2, 195–220.
- Vidmar, Jernej (2015). Nadzor in represija na meji med Jugoslavijo (FLRJ) in Italijo v letih 1947–1954. *Kronika* 63, 119–136.
- Van Dijk, Teun (1991). *Racism and the Press*. London: Routledge.
- Vodopivec, Peter (2006). *Od Pohlinove slovnice do samostojne države: Slovenska zgodovina od konca 18. stoletja do konca 20. stoletja*. Ljubljana: Modrijan.
- Wodak, Ruth (1996). *Disorders of Discourse*. London: Longman.

## SEZNAM UPORABLJENIH ČLANKOV (časovno naraščajoče)

- »Čemu gradnja doma v Jurjevici tako počasi napreduje«, *Ljudska pravica*, 14. september 1948: 8.
- »Redovnice in samostan kongregacije sester sv. Frančiška Asiškega so bili opora protijudskih elementov pri prehodih v inozemstvo«, *Celjski tednik*, 19. februar 1949: 3.
- »Nikdar več iz domovine«, *Ljudski glas*, 20. marec 1952: 1.
- »Izpred okrožnega sodišča. Za nameravani beg čez mejo ...« (rubrika Iz Celja ...) *Savinjski vestnik*, 13. december 1952: 5.
- »Ko bi le mogla do tebe, da bi ti odkrila gorje mojega življenja«, *Obmurski tednik*, 8. januar 1954: 2.

- »Pobegnil v tujino in tam kradel« (rubrika Še nekaj ...), *Slovenski poročevalec*, 26. marec 1954: 7.
- »Napišite vsem mladim, naj prenehajo sanjati ...«, *Slovenski poročevalec*, 18. april 1954: 8.
- »Drugo plat pa zamolčijo«, *Slovenski vestnik*, 14. maj 1954.
- »Pomagali so pri pobegu čez mejo« (rubrika Še nekaj ...), *Slovenski poročevalec*, 19. junij 1954: 5.
- »Namesto tujine – smrt v prepadu« (rubrika Še nekaj ...), *Slovenski poročevalec*, 9. junij 1954: 5.
- »Le nepremišljeni ljudje iščejo srečo v tujini« (rubrika Iz naših krajev in podrubrika Iz življenja Maribora in okolice), *Ljudska pravica*, 26. junij 1954: 10.
- »Tja in nazaj čez mejo« (rubrika Še nekaj ...), *Slovenski poročevalec*, 10. julij 1954: 5.
- »Zaslužili so« (rubrika Še nekaj ...), *Slovenski poročevalec*, 7. avgust 1954: 5.
- »Pot v lepše življenje se jima ni posrečila« (rubrika Še nekaj ...), *Slovenski poročevalec*, 15. avgust 1954: 5.
- »Pobeg čez državno mejo« (rubrika Še nekaj ...), *Slovenski poročevalec*, 12. september 1954: 11.
- »Čez mejo so hoteli uiti« (rubrika Še nekaj ...), *Slovenski poročevalec*, 27. oktober 1954: 7.
- »O delu sekretariata za notranje zadeve«, *Ljudska pravica*, 29. januar 1955.
- »Tov. Strbenkova ustvarja mučenike«, *Velenjski rudar*, 15. marec 1955.
- »Pobegi v soboškem okraju«, *Slovenski poročevalec*, 7. avgust 1955.
- »Iz sodne dvorane. Obravnava o uboju v bohinjskih gorah«, *Ljudska pravica*, 29. avgust 1955.
- »Žalostna pota nepremišljenih avanturistov«, *Slovenski poročevalec*, 14. december 1955.
- »Kako dolgo bo naša država še zatočišče kriminalnih emigrantov?« *Slovenski vestnik*, 20. januar 1956.
- »Meja je nevarna stvar« (rubrika Izpred sodišča), *Ljudska pravica*, 3. september 1957.
- »Postrizene peruti in polomljeni kremplji« (z nadnaslovom »Zgodba o organizatorjih prebegov čez mejo«), *Slovenski Jadran*, 20. marec 1959: 7.
- »Obsojeni organizatorji pobegov čez mejo« *Delo*, 6. marec 1961: 7.

## SUMMARY

### CONTROL OF UNCONTROLLED MIGRATIONS: HOW THE SLOVENIAN NEWSPAPERS REPORTED ON DEFECTIONS FROM YUGOSLAVIA 1945–1965

Jernej MLEKUŽ

In the first two decades after the Second World War, the socialist authorities closely patrolled the national borders and sanctioned illegal exits. And the socialist authorities also controlled, supervised and directed the media. These were the basic coordinates that we understood to be the case when we thumbed through the pages of the socialist newspapers in order to see how the newspapers reported on cross-border defections in the period from 1945–1965. To put it in slightly more scholarly terms, the author analysed the discourses – the particular methods of representation used to give meaning to defections and defectors. He addressed these issues with the help of various tools and assumptions of (critical) discourse analysis (interpretative and explanatory nature, the dialectical connections of society and culture with discourse, curiosity about the relationship between the text and its social circumstances, ideologies and power relations, etc.). The author found articles that discussed or mentioned defections and defectors by using the search term “*prebeg*” (escape, desertion) in the Digital Library of Slovenia and by reviewing the newspaper *Slovenski poročevalec* [Slovenian Reporter] in 1954 (the additional newspaper mentions of desertions in *Slovenski poročevalec* indicated how many articles we had missed by using the aforementioned search term, i.e. how many more articles on desertions might be found). He discovered that the newspapers *apparently* preferred to remain silent about desertions (I found 25 articles; use “*apparently*” here because “the meagreness of writing on desertions” is still just a hypothesis and of course only a subjective assessment). When desertions did nevertheless appear in newsprint, they were criminalized and not infrequently subjected to a fair amount of moralizing. When the deserters themselves were given voice, they expressed remorse and contrition, with the message that going abroad meant suffering, misery or even ruin. The author arrived at these conclusions on the basis of the scant selection of articles and the interpretative methodology. With a larger selection of articles and a different reading, other researchers might arrive at different conclusions.



# POLITIČNOST MIGRACIJ PO DRUGI SVETOVNI VOJNI: OD POLITIKE REVANŠIZMA DO AMNESTIJE

Marina LUKŠIČ HACIN<sup>1</sup>

COBISS 1.02

## IZVLEČEK

**Političnost migracij po drugi svetovni vojni: Od politike revanšizma do amnestije**  
Prispevek se osredotoča na kompleksnost selitvene dinamike v Republiki Sloveniji/Jugoslaviji takoj po drugi svetovni vojni, točneje, od medvojnih razmer in konca vojne do liberalizacije jugoslovanske politike na področju mednarodnih selitev, povezane z Zakonom o amnestiji (1962) in s Sporazumom med SFR Jugoslavijo in Republiko Avstrijo o reguliranju zaposlovanja jugoslovanskih delavcev v Avstriji (1963). Temeljni namen prispevka je pregledno strniti in strukturirati prevladujoče selitvene prakse v Sloveniji v izbranem obdobju, z dodatnimi poudarki na mednarodnih političnih dejavnikih, ki so pomembno vplivali na obravnavano selitveno dinamiko.

**KLJUČNE BESEDE:** selitve, izseljenci, priseljenci, povratniki, begunci, prebežniki

## ABSTRACT

**The Political Character of Migration after the Second World War: From the Politics of Revanchism to Amnesty**

The paper focuses on the complexity of the dynamics of migration in the Republic of Slovenia/Yugoslavia in the immediate aftermath of the Second World War, or more precisely, during the period spanning the wartime and its conclusion to the years of the liberalisation of the Yugoslav international migration policy, linked to the 1962 Law on Amnesty, and to the agreement between SFR Yugoslavia and the Republic of Austria on the regulation of the employment of Yugoslav workers in Austria (1963). The paper aims to provide a concise and structured overview of the prevalent migration practices in Slovenia during this period, highlighting international political processes that had a significant impact on the dynamics of migration.

**KEY WORDS:** migration, emigrants, immigrants, re-migrants, refugees

---

<sup>1</sup> Dr. sociologije, izredna profesorica, Univerza v Novi Gorici, znanstvena svetnica, Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; luksic@zrc-sazu.si — Prispevek je nastal v okviru raziskovalnega projekta »Socialna, gospodarska in kulturna zgodovina slovenskega izseljenstva 1945–2015« (J5-8246) in programske skupine »Narodna in kulturna identiteta slovenskega izseljenstva v kontekstu raziskovanja migracij« (P5-0070).

## UVOD

V razpravi Političnost migracij po drugi svetovni vojni: Od politike revanšizma do amnestije se osredotočam na kompleksnost selitvene dinamike v Republiki Sloveniji (kot delu Jugoslavije) takoj po drugi svetovni vojni, točneje, od medvojnih razmer in konca vojne do liberalizacije jugoslovanske politike na področju mednarodnih selitev, povezane z Zakonom o amnestiji (1962) in s Sporazumom med SFR Jugoslavijo in Republiko Avstrijo o reguliranju zaposlovanja jugoslovanskih delavcev v Avstriji (1963). Na obravnavano obdobje so močno vplivali mednarodna razmerja sil in revanšistični odnosi med narodi, ki so izhajali tako iz obdobja druge svetovne vojne kot njihovega povojnega spreminjanja. Po vojni so se odnosi med sovražniki in zavezniki »premešali«, nekdanji zavezniki so se vse bolj vidno razhajali, postopno so se najavljali blokovska delitev sveta in prehod medvojnih zavezništev v medsebojno kompetitivnost, na koncu pa v hladno vojno med vzhodnim in zahodnim blokom. V primeru Jugoslavije moramo temu dodati še razhod v času informbiroja, ki je Jugoslavijo od tesnega povezovanja z zvezo socialističnih držav skupaj s še nekaterimi državami preusmeril k iskanju tretje poti zunaj blokovske uvrščenosti in k ustanovitvi gibanja neuvršenih. Vse to pa je pri nas odločujoče zaznamovalo migracijsko/selitveno dinamiko.

V prispevku skušam z dodatnimi poudarki na mednarodnih političnih dejavnih predvsem pregledno strniti in strukturirati prevladujoče migracijske/selitvene prakse v Sloveniji v izbranem obdobju.<sup>1</sup> Ti dejavniki so pomembno vplivali na dogajanja v Republiki Sloveniji in na njen položaj, s tem pa tudi na migracijsko/selitveno dinamiko od konca druge svetovne vojne do liberalizacije jugoslovanske mednarodne migracijske/selitvene politike v začetku šestdesetih let. V dosedanjih obravnavah so izbrano vsebino različni avtorji parcialno tematizirali, pogosto je bila etnično ali prostorsko vezana in zamejena, tako da šele strnjen pregled pokaže vso kompleksnost pojava. Obravnava sloni na kvalitativni raziskovalni metodi, imenovani interferenca, pri kateri se že zbrani podatki in dejstva uporabijo v novi kontekstualizaciji, in sicer z namenom oblikovanja alternativnega razumevanja izbrane tematike (Barakso, Sabet, Schaffner v Bučar 2016: 13).

## MEDVOJNA IN POVOJNA PREHAJANJA, ODHAJANJA IN IZGONI

Podobno kot prva je le dobri dve desetletji pozneje v selitve ljudi po Evropi in svetu močno posegla tudi druga svetovna vojna. Divjanje vojn po celem svetu je med drugim povzročilo tudi globalne selitve vojska, izgone prebivalcev, nasilna trpanja ljudi v taborišča, beg ljudi v hipotetično varnejše dele sveta. Vse to se je dogajalo

<sup>1</sup> Prispevek je nadaljevanje analize, objavljene v prispevku Selitvena dinamika slovenskega prostora v zgodovinski perspektivi (Lukšič Hacin 2018), ki se je osredotočal na krajšo časovno periodo od druge svetovne vojne do začetka šestdesetih let 20. stoletja.

tudi v Sloveniji oziroma (večetnični) Jugoslaviji, katere del je bila. Intenzivnost je bila toliko večja, ker smo bili Slovenci tarča genocidne in etnocidne politike vseh treh okupatorskih sil.

Nemški načrti so imeli tri bistvene dele, in sicer: množičen izgon Slovencev, množično kolonizacijo Nemcev na slovenskem ozemlju, popolno ponemčenje ostanka prebivalstva. [...] Madžari so več tisoč Slovencev, ki so se v Prekmurje priselili med obema vojnama, in narodno zavedne Prekmurce večinoma deportirali v koncentracijsko taborišče Sárvar. [...] V t. i. Ljubljanski pokrajini pod italijansko oblastjo je bilo interniranih in v koncentracijska taborišča poslanih približno [...] 7–9 % prebivalstva. (Repe 2010: 245)

Takoj po anšlusu se je najprej začel nov val prebegov iz slovenske Koroške in drugih delov Avstrije v Slovenijo/Jugoslavijo. Po začetku druge svetovne vojne v Jugoslaviji pa je nemški okupator v Sloveniji v prvem valu aretacij, pregonov in streljanja talcev zajel prav nekdanje begunce iz Avstrije, zlasti vodilne v emigrantskih organizacijah (Grafenauer 2010: 479). Med nasiljem, ki so ga od leta 1941 do konca vojne preživljali ljudje in pred katerim so bežali, naj poudarim nasilne deportacije ljudi v Nemčijo, Italijo, Hrvaško, Srbijo, Bosno in Hercegovino in drugam. Številni so bili deportirani v delovna in koncentracijska taborišča v Italiji in Nemčiji. Pogosto so jim odvzeli tudi otroke (Drnovšek 2001: 2; Kržišnik Bukič 2004; Dolinšek Divčič 2001). Poleg Slovencev so bili pogromu še zlasti izpostavljeni Judje (Toš 2010) in Romi. Del raznarodovalne kolonialne politike v predelu Slovenije, ki ga je okupirala Nemčija, je bila tudi preselitev večine Kočevarjev, ki so se, v kontekstu italijansko-nemških usklajevanj okupacijskih politik, iz Kočevske večinoma preselili na Štajersko (Ferenc 2010) in se tam naselili na izpraznjene domove slovenskih izgnancev.

Opisana razmerja in nasilja so nadaljevanje nerešenih globalnih kolonialnih ambicij iz prve svetovne vojne. Z njimi so se nadaljevale stare in/ali vzpostavljale nove sovražnosti, te pa so porajale nove ekstremne konflikte in vzajemna revanšistična medvojna in povojna razmerja, ki so, tako na lokalni kot globalni ravni, krenila ključne dejavnike migracijske/selitvene dinamike v povojnem času. Po drugi svetovni vojni je, podobno kot po prvi, prihajalo do intenzivnih premikov (odhodov, prihodov in vračanj) prebivalstva, ki so bili vzročno-posledično povezani z dogajanjem med drugo svetovno vojno. V Sloveniji/Jugoslaviji so zaradi neposredne življenjske ogroženosti bežali pripadniki poražene vojske (in njihove družine), ki so sodelovali z Nemci, zaradi močne psihoze strahu pred novo politično (socialistično) oblastjo pa tudi del civilnega prebivalstva. Odhajali so v begunska taborišča v Avstrijo in Italijo (Švent 2007). Med njimi je bil velik delež intelektualcev, zlasti univerzitetnih učiteljev. Povojnim beguncem v taboriščih se je pridružil še del Slovencev, ki se iz političnih, verskih, osebnih ali kakih drugih zadržkov ni želel vrniti domov: vojni ujetniki, interniranci, delavci, med vojno prisilno odvedeni na delo v Nemčijo, ter študenti z italijanskih in drugih univerz (Drnovšek 2010: 256).

Med prebivalstvom, ki se je umaknilo iz Slovenije/Jugoslavije, naj poudarim položaj manjšinskih (etničnih) populacij, ki so se znašle med skupinsko (so)odgovornostjo za okupatorska ravnanja med drugo svetovno vojno. Mednje spadajo tudi tisti Kočevarji, ki so se v začetku vojne vključili v nemški »kolonizacijski program preseljevanja«<sup>2</sup> iz Kočevske na Štajersko in so se ob koncu vojne skoraj vsi umaknili v begunska taborišča v Avstrijo (Ferenc 2010: 532) ter postali razseljene osebe. Sicer pa se je konec leta 1946 začela aktivna revanšistična in »konfiskacijska« politika do nemške manjšine na Slovenskem; začeli so se izgoni, med njimi tudi ljudi s starojugoslovanskim državljanstvom (Drnovšek 2010: 258). Že pred tem so se dogajali pobegi in izselitve prebivalcev nemškega porekla, predvsem od konca novembra 1944, ko je predsedstvo Avnoja uzakonilo zaplembe (konfiskacije) in podržavljenje zaplenjene sovražnikove lastnine – t. i. »patriotično nacionalizacijo«. Odlok je bil usmerjen predvsem proti Nemcem, tako jugoslovanskim kot rajhovskim državljanom, in proti tistim, ki so z njimi sodelovali med okupacijo.<sup>3</sup> Za razlaščenje z zaplembami brez odškodnine je bila odločilna etnična (narodna) pripadnost (*Slovenska kronika* 1996: 119). Etnična pripadnost je bila takoj po vojni tudi sicer med pomembnimi dejavniki političnega revanšističnega odnosa do določenih manjšinskih populacij. V prvih povojnih letih so bili številni pripadniki italijanske, nemške in madžarske manjšine iz Slovenije izgnani kot »sovražni elementi«<sup>4</sup> (Gombač 2005: 50–55).

Zaradi izida druge svetovne vojne so bile na obmejnih območjih Slovenije/Jugoslavije pričakovane tudi »selitve meja« s sosednjimi državami. Pričakovanja selitev meja so, poleg izgonov in pobegov, povzročila dodatna intenzivna večletna etnično obeležena preseljevanja ljudi na (nova) obmejna območja Slovenije/Jugoslavije z Italijo, Avstrijo in Madžarsko. Meje z Madžarsko so bile relativno hitro določene, urejanje meja z Avstrijo in Italijo pa je trajalo dobro desetletje. Dogovori o mejah so se leta 1946 začeli s pariško mirovno konferenco, dokončno pa so bili z Italijo potrjeni šele leta 1954 (Londonski memorandum), z Avstrijo pa leta 1955 (Avstrijska državna pogodba). Poleg drugih političnih in ideoloških razhajanj treh državnih politik, ki so se v tem času z različnimi stališči in pozicijami vpenjale v globalna razmerja sil, je bilo desetletno nejasno obmejno stanje dodatni dejavnik, ki je določal jugoslovansko migracijsko politiko in oteževal normalizacijo obmejne migracijske dinamike.

Pri razmišljanju o jugoslovansko-avstrijski dinamiki ne smemo pozabiti, da je bilo vojno stanje z Avstrijo odpravljeno šele januarja 1951 in da je bila Avstrija, vse do Pogodbe o Avstriji iz leta 1955, razdeljena na štiri zasedbene cone. Povojne razmere

2 Več o nemškem kolonizacijskem planu glej Repe 2010: 245–256.

3 »Odnos do nemške manjšine je na seji glavnega odbora OF Slovenije 15. decembra 1945 jasno določil Boris Kidrič: »Nemška manjšina pri nas ne bo imela nobene pravice, ker je ne bo!« [...] Ker Jugoslavija pri preselitvi nemške manjšine iz nekaterih vzhodnoevropskih držav ni bila upoštevana (konferenca v Potsdamu julija in avgusta 1945), so jih jugoslovanski obmejni organi prisilili k ilegalnemu prestopu meje ...« (Drnovšek 2010: 260).

4 Komisije za ugotavljanje zločinov okupatorjev in njihovih pomagačev v Republiki Sloveniji so prenehale delovati konec leta 1947. Leto pozneje so delo komisij na državni jugoslovanski ravni prevzeli organi za notranje zadeve (prav tam: 257).

vzdolž celotne jugoslovansko-avstrijske meje, se pravi slovenske severne meje, so se bistveno izboljšale šele s podpisom Meddržavnega sporazuma o rešitvi dvolastniškega vprašanja in Sporazuma o obmejnem prometu oseb (1953). Meja med FLRJ in Avstrijo je bila sicer določena na konferenci zunanjih ministrov v Parizu (1947), ko je bilo sklenjeno, da ostane takšna, kot je bila januarja 1938, dokončno pa je bila potrjena šele, ko je Avstrija leta 1955 dobila državno samostojnost z Avstrijsko državno pogodbo (Nečak 1985; Božič 2010).

Temu dodajmo še dejstvo o begunskih taboriščih v Avstriji, kamor so se zatekli povojni begunci iz Slovenije, takrat prepoznani kot medvojni kolaboranti okupatorjev oziroma pozneje poimenovani kot sovražna politična jugoslovanska emigracija. Njihova prisotnost onkraj meje je kar nekaj let vplivala na pripisovanje velikega pomena državnim mejam tudi iz varnostnih vidikov zaščite pred t. i. sovražnimi elementi in njihovim potencialnim vračanjem. Iz taborišč so se začeli po svetu razseljevati šele po letu 1947,<sup>5</sup> njihovo razseljevanje pa je trajalo vse do leta 1951. Medvojnina vloga Avstrije kot zaveznice okupatorskih sil in povojna pomoč beguncem – kolaborantom oziroma sovražnikom sta bila negativna dejavnika pri urejanju meddržavnih odnosov tudi z vidika potencialne čezmejnne migracijske (delovne) dinamike. Hkrati pa se je FLRJ po informbiroju leta 1948 znašla v politični in gospodarski blokadi s strani zveze socialističnih držav. Pri iskanju novih gospodarskih in političnih zavezništev se je za morebitna gospodarska sodelovanja ozirala tudi prek severne meje. To zblíževanje z Avstrijo, ki je vplivalo tudi na uradna, vse bolj liberalna jugoslovanska stališča do čezmejnne migracijske dinamike, je pripeljalo do bilateralnega sporazuma o zaposlovanju jugoslovanskih delavcev v Avstriji (1963).

Podobno kot z Avstrijo so bili kompleksni tudi jugoslovansko-italijanski odnosi. Iz dela Primorske, ki je bil kot del razpadle Avstro-Ogrske po prvi svetovni vojni priključen Italiji<sup>6</sup> in je po drugi svetovni vojni ponovno pripadel Sloveniji/Jugoslaviji, so se pred drugo svetovno vojno priseljeni Italijani začeli umikati že po letu 1943 (Drnovšek 2010: 258), ko je Italija podpisala kapitulacijo. Po vojni se je migracijska dinamika zaradi vseh dogajanj še intenzivirala. Začel se je množični odhod Italijanov z ozemelj, ki jih je zasedla jugoslovanska narodnoosvobodilna vojska (Gombač 2005: 10). Razlogi za odhod so bili številni: politične in etnične narave – ko so odhajali tisti, ki so bili razglašeni za »sovražnike ljudstva«; ekonomske in socialne narave – ko so odhajali premožni, potencialni »razredni sovražniki« na eni in revni prebivalci na drugi strani.

5 Več o tem v Švent 2007.

6 Z Rapalsko pogodbo (1920) je Primorska dokončno prišla pod Italijo. Na anektiranem ozemlju je bila kmalu ustanovljena samostojna upravna enota Julijska krajina, že takoj po vojni pa se je na različne načine začela postopna italijanizacija območja (Pelikan 2010: 367). Pred tem so leta 1918 »nove oblasti izgnale vse bivše državljane Avstro-Ogrske, ki v Julijski krajini niso imeli stalnega bivališča, druge je italijanska oblast uradno izgnala z zavrnitvijo pravice do državljanstva, kar je posebej prizadelo intelektualce« (prav tam: 369).

V primeru prebivalstva italijanskega porekla, ki je bilo v veliki meri del premožnejših slojev, je prišlo do prekrivanja dejavnikov (Kalc 2019: 150), kar je delno primerljivo z že omenjeno situacijo pri premožnejših pripadnikih nemške manjšine, a se primera zaradi systemskega izгона slednjih tudi zelo razlikujeta. V prvih povojnih letih so se z obmejnih območij v Italijo selili tudi številni Slovenci, in to vse do implementacije mirovne pogodbe z Italijo (1947), po kateri je Jugoslavija/Slovenija močno omejila možnosti prehajanja meje (Troha 2010: 433–441). Leta 1947 je bila namreč na podlagi pariške mirovne pogodbe Primorska priključena k Sloveniji v okviru takratne FLRJ. Hkrati pa je bilo na širšem območju Trsta in v delu severne Istre ustanovljeno Svobodno tržaško ozemlje, ki je bilo vir zaostrovanj odnosov med Italijo in Jugoslavijo. Po pariški mirovni konferenci so začeli odhajati prebivalci iz Pulja in drugih istrskih mest ter s podeželja.

V majhnem žepku na severozahodu istrskega polotoka, ki ga je predstavljala cona B Svobodnega tržaškega ozemlja (STO) pod upravo Vojaške uprave jugoslovanske armade (VUJA), pa do množične izselitve ni prišlo. Tam so Italijani, Slovenci in Hrvati še naprej živeli skupaj, čeprav je med temi nacionalnimi skupinami zeval globok prepad. (Gombač 2005: 10)

Omenjena situacija je trajala do sprememb, ki jih je prinesel Londonski sporazum leta 1954. Po drugi strani pa so se med letoma 1949 in 1952 v Trst in Gorico vračali Slovenci – pregnanci, ki so med obema svetovnima vojnama iz Italije pred fašizmom zbežali v (prvo) Jugoslavijo. Med njimi je bil velik del izobražencev. Zaradi naklonjenosti jugoslovanstvu ali socialistični ureditvi pa so se v cono B priseljevali tudi posamezniki iz cone A (Drnovšek 2010: 269; Kalc 2019: 155).

Med letoma 1947 in 1954 je bilo pri svetovnih povojnih političnih velesilah »v igri« več scenarijev v zvezi z usodo Svobodnega tržaškega ozemlja; nekateri so upoštevali tudi etnične raznolikosti. V enem od scenarijev so Američani in Angleži, ki so podpirali italijanske ambicije, zagovarjali priključitev celotnega območja Italiji, po ruskem scenariju pa naj bi se to ozemlje v celoti integriralo z Jugoslavijo, pri čemer naj bi Trst ostal avtonomna cona (Pirjevec v Čebren Lipovec 2019: 201). Leta 1954 je Londonski sporazum »zaključil zgodbo« Svobodnega tržaškega ozemlja z njegovo razdelitvijo med Jugoslavijo in Italijo (Kalc 2019: 151) in povzročil novo intenzivno obmejno selitveno dinamiko. Poleg politične propagandne dejavnosti, ki sta jo izvajali obe državi in tako vplivali na opredelitve in selitve prebivalstva, je bila dodaten dejavnik uradna odločitev o možnostih zamenjave državljanstva. Prebivalcem STO je bila namreč dana pravica do svobodne izbire državljanstva. Lahko so se opredelili za italijansko državljanstvo, a so se morali v roku enega leta, ki je bil nato podaljšan še za eno leto, izseliti v Trst in druge dele Italije. Pod enakimi pogoji so se lahko opredelili za jugoslovansko državljanstvo in selitev v Jugoslavijo. Temu so sledile radikalne posledice. Večina prebivalstva italijanskega etničnega porekla se je z ozemlja, ki je pripadlo Jugoslaviji (cona B), do leta 1957 preselila v Italijo. Pridružil pa se jim je tudi

del prebivalcev slovenskega in hrvaškega porekla, ki se ni strinjal z novo socialistično ureditvijo<sup>7</sup> (Gombač 2005: 11, 87–88; Kalc 2019).

Množična selitev je pustila posledice v izvornem okolju in v okolju sprejema. Posledice za izvorno okolje Koprškega okraja so povezane z dejstvom, da so odhajali staroselci, večina med njimi italijanskega porekla, hkrati pa so priseljenci prihajali iz notranjosti Slovenije ali drugih jugoslovanskih republik,<sup>8</sup> kar je povsem spremenilo dotedanjo zgodovinsko konstituirano etnično, kulturno in socialno krajino (Kalc 2019: 151–154). Posledice so bile vidne tudi v okolici sprejema, to je v tržaški družbi, ki je bila v tistem času v globoki krizi in je bil prihod dodatnega velikega števila ljudi dodatno družbeno breme (Gombač 2005: 11). Hkrati pa je Trst in delno Goriško zajelo še močno preoceansko izseljevanje, ki je bilo posledica gospodarske krize, v katero se je v Trst in okolico dodatno doselilo okrog 65.000 beguncev iz Istre. Po odhodu Anglo-Američanov so ljudje izgubili delo. Sledila je psihoza nezadovoljstva in razočaranja, tudi političnih napetosti, kar je na koncu kulminiralo tudi v nezaupanje v italijansko državo. Pri tem je pomembno dejstvo, da je italijanska vlada sistematično podpirala izseljevanje slovenske manjšine z obmejnega območja, ki je imelo zanj strateški politični pomen. Aktivna podpora izseljevanju je segala v leto 1946, ko so številni že odhajali v Švico, Luksemburg in drugam, največ pa v Belgijo in Francijo, saj je italijanska vlada z njima podpisala pogodbe o t. i. izvozu delovne sile (Drnovšek 2010: 260; Kalc 2002: 121–122).

Italijanske oblasti so ruralno periferijo in suburbane dele Trsta z večinskim slovenskim (delavskim) prebivalstvom razumele kot območje »levičarskih slovenskih komunistov«, zaničevalno poimenovanih tudi »slavokomunisti«, ali »anti-italijanskih« sil in so spodbujale izseljevanje slovenskega prebivalstva. Hkrati je potekalo ekspanzijsko poseljevanje Trsta z novimi priseljenci – begunci oziroma izgnanci (ezuli/op-tanti), ki ga lahko razumemo tudi kot primer »nacionalne bonifikacije« ali italijanizacije velikega dela tržaškega prostora (Volk v Čebren Lipovec 2019: 205). Vendar moramo poudariti, da so na obmejnih (manjšinskih) območjih, s katerih so se izselili prebivalci manjšinskih populacij, z revanšizmom prežeti družbeni in politični procesi potekali na obeh straneh meje. Tako z mednarodnega stališča kot s stališča državnih meja sta potekala vzajemna procesa slovenizacije<sup>9</sup> in italijanizacije manjšinskih prostorov (prav tam: 213); migracije, izselitve in priselitve so bile v tem času intenzivno vpete v vzajemna revanšistična ravnanja hegemonskih razmerij moči.

7 V populaciji, ki se je izselila, je bilo 70 odstotkov ljudi italijanskega porekla, 30 odstotkov pa pretežno slovenskega in manj hrvaškega (Kalc 2019: 146).

8 Od konca vojne do leta 1957 je območje zapustilo skoraj 53 odstotkov predvojne populacije, priselili pa so se novi prebivalci (prav tam: 151).

9 V obdobju 1945–1956 se je populacija prebivalcev italijanskega porekla zmanjšala za 92 odstotkov (Kalc 2019: 149). Prebivalstvo italijanskega porekla, ki je ostalo, je ne glede na svoj ustavni status narodne manjšine postalo marginalizirano v javnem življenju (Čebren Lipovec 2019: 206).

## MEDVOJNA IN POVOJNA PRIHAJANJA IN VRAČANJA

Do sedaj sem o selitveni dinamiki na Slovenskem ob koncu druge svetovne vojne pisala predvsem skozi prizmo odhajanj in izgonov. Po drugi strani pa so v tem času ljudje tudi prihajali oz. se vračali. Iz drugih jugoslovanskih republik ali različnih bolj ali manj oddaljenih delov sveta so se vračali vojaki, ki so se borili v vrstah zmagovalne strani. Postopoma so se začeli vračati vojni ujetniki. Med povratniki so bili tudi deportiranci in izgnanci, ki so preživelih nasilje v taboriščih ali vojno v okoljih, kamor so bili izgnani. To obliko povratništva uvrščamo v repatriacijo (Gombač 2006: 13). Povratništvo kot repatriacija se je po vojni nanašalo na vojne ujetnike, prisilno odpeljane delavce, civilne internirance v delovnih taboriščih in taboriščih smrti, zapornike, begunce, izgnance, nekdanje mobilizirance v nemško vojsko, ugrabljene otroke, torej na tiste, ki so bili prisilno preseljeni in so se vračali v domovino. Zanje je bila že med vojno ustanovljena Agencija Združenih narodov za pomoč in obnovo (1943), znana pod kratico UNRRA. Z njimi so sodelovale tudi jugoslovanske oblasti, ki so svojim prebivalcem pomagale pri vračanju (prav tam: 20).

Poleg repatriacije so se po vojni dogajala tudi »klasična vračanja«. Domov so prihajali delovni migranti, ki so se že v obdobju med obema svetovnima vojnama izselili iz Jugoslavije ali pred prvo svetovno vojno iz Avstro-Ogrske, ob nastanku nove države pa so se iz (ideološkega) simpatizerstva do nove politične ureditve vrnili domov.<sup>10</sup> »Domovina vas potrebuje, je bilo eno od gesel tistega časa« (Drnovšek 2010: 270). Pod tem geslom je med Slovenci/Jugoslovani po svetu potekala velika propagandna akcija za vrnitev, povezana z obnovo razrušene domovine (prav tam). Pozitiven odnos državne in republiške politike do repatriacije in drugih povratnikov se kaže v aktivni pomoči. Ta je bila povezana tudi s posebnimi političnimi inštitucijami, ki so bile uradno odgovorne za pomoč repatriirancem in drugim povratnikom. Takoj po vojni so bile v Sloveniji za propagandno dejavnost in informiranje starih izseljencev in repatriirancev odgovorne številne inštitucije: Tiskovni urad pri Predsedstvu vlade, Ministrstvo prosvete (Oddelek za kulturne vezi z inozemstvom in Oddelek za manjšinske in izseljeniške šole), Ministrstvo za delo (Odsek za izseljence) in Rdeči križ Slovenije (Drnovšek 2010: 268). Ob vrnitvi jim je država pomagala pri prevozu v domovino, pridobivanju stanovanj in stanovanjski opreми, oskrbi z živili, menjavi deviz, urejanju socialnih zadev, iskanju zaposlitve, šolanju otrok itd. Pomembno vlogo pri

10 Po podatkih se je med letoma 1945 in 1951 v Jugoslavijo vrnilo 16.128 oseb, 3914 iz Francije; 1477 iz Nemčije; 1053 iz Belgije; 1119 iz držav sovjetskega tabora; 1377 iz drugih evropskih držav; 819 iz ZDA; 1727 iz Kanade; 1748 iz Argentine; 678 iz Brazilije; 569 iz drugih ameriških držav; 1250 iz Avstralije; 397 iz drugih držav po svetu. Vrhunec vračanja je bilo leto 1948, ko se je vrnilo 5933 oseb. Med njimi je bilo 52 odstotkov Hrvatov, 27,5 odstotka Slovencev, 10 odstotkov Srbov, 5,7 odstotka Makedoncev, 1,5 odstotka Črnogorcev in 3,3 odstotka drugih. Junija 1950 so ugotavljali, da se je okrog 60 odstotkov izseljencev in povratnikov vrnilo v domovino z državljanstvom države, v kateri so živeli. Zlasti vevstfalski povratniki so v preteklosti prevzeli nemško državljanstvo (Drnovšek 2010: 270–271).



tem je imelo Zvezno ministrstvo za delo. Hkrati z odhajanjem in vračanjem pa se je že začela obnova razrušene države, kar je dodatno vplivalo na migracijsko dinamiko.

## OBNOVA IN PRESELJEVANJE PO JUGOSLAVIJI

Takoj po vojni so se medvojnimi dejavniki selitvene dinamike (povezanim z globokimi političnimi konflikti in revanšizmom) pridružili povojni, ki so bili povezani s politično, z ekonomsko in ideološko vpetostjo Jugoslavije v mednarodne in medetnične odnose v Srednji Evropi. Naj ob tem poudarim specifično selitveno dinamiko, ki se je na medrepubliški ravni v povezavi s procesi izgradnje in obnove jugoslovanske države začela takoj po vojni. Že leta 1945 je Jugoslavija začela izvajati aktivno kolonizacijsko politiko. Vanjo so se delno vključili tudi Slovenci (Josipovič 2014: 75–76). Začela se je s pozivom Ministrstva za poljedelstvo Ljudske vlade Republike Slovenije septembra 1945, še pred začetkom same agrarne reforme in notranje kolonizacije v Sloveniji.

Do konca leta se je odzvalo 1776 borcev, invalidov in žrtev fašističnega terorja, kar je bilo manj od načrtovanih selitev in je bilo razumljeno kot polovičen uspeh. Krivdo zanj so pripisovali propagandi slovenskega partijskega vodstva, ki je nasprotovale izseljevanju iz slovenskega Primorja. Prva skupina slovenskih kolonistov je odšla proti Vojvodini novembra 1945 in se naselila v Gudurici (Lukić 2017: 47). Kolonizacijska selitvena dinamika več kot toliko Slovencev ni zajela. Tisti, ki so se odločili za odhod, so se v 96 odstotkih odločili za naselitev v južnem Banatu. Tako imenovani slovenski naseljski rajon je v največji meri zajel Gudurico, Veliko Gredo in Banatsko Plandište. Vendar se jih je kar nekaj po par letih odločilo za vrnitev in so kot kraj priselitve izbrali večja industrijska središča v Sloveniji (prav tam: 48–52).

Obnova domovine je bila povezana še z drugimi oblikami preseljevanja po Jugoslaviji. Slovenija, ki je sodila med razvitejše jugoslovanske republike, je bila takoj po vojni intenzivno vključena v različne oblike pomoči nerazvitim republikam; ena od oblik pomoči je bil strokovni kader. Slovenski strokovnjaki, ki so bili »razposlani« po državi, so imeli vidno vlogo pri npr. graditvi železarn v Hrvaški in BiH, elektroenergetskih objektov v BiH in Črni gori, cementarnah v Srbiji in Makedoniji itd. (*Slovenska Kronika* 1996: 145). Druga oblika pomoči pri obnovah, ki se je začela takoj po vojni in je bila povezana s kratkotrajnimi selitvami ljudi, so bile mladinske delovne brigade, ko so predvsem mladi iz vseh republik prostovoljno delali v drugih republikah. Morda lahko rečemo, da so bile delovne brigade specifična oblika sezonske delovne medrepubliške migracije, ki so v tej obliki trajale do šestdesetih let (pozneje, v sedemdesetih, so jih ponovno obudili z drugimi negospodarskimi cilji).

Prvo brigado so organizirali za gradnjo železniške proge Brčko–Banovići (1946), kjer je delalo 6220 Slovencev (vseh udeležencev je bilo več kot 60.000), drugo pa za gradnjo železniške proge Šamac–Sarajevo, kjer je sodelovalo 14.000 Slovencev. Do leta 1952 sta bila osnovna namena delovnih brigad neposredna obnova na temelju prostovoljnega, neplačanega dela in druženje mladih (študentov in dijakov) na

zvezni ravni, kar naj bi krepilo bratstvo in enotnost, ki je bilo eno temeljnih načel medetničnega/mednarodnega sobivanja v federativni državi (prav tam: 153–154). S pomočjo delovnih brigad je bila npr. zgrajena Nova Gorica. Njena gradnja se je začela decembra 1947, po odločitvi, sprejeti po sklenitvi mirovne pogodbe med FLRJ in Italijo, ko je stara Gorica pripadla Italiji in je slovenski del Goriške ostal brez kulturnega in političnega središča. Prva stanovanjska naselja so bila zgrajena že spomladi 1950 (prav tam: 164). V novozgrajeno mesto so se, podobno kot v druga primorska mesta, priselili prebivalci iz cele Jugoslavije. Poleg Nove Gorice naj kot novonastalo slovensko mesto omenim tudi Velenje, ki je leta 1963 postalo gospodarsko, kulturno in upravno središče Šaleške doline in katerega prvi priseljenci so bili sicer Slovenci, z naraščanjem industrije pa se je povečalo število prihodov prebivalcev iz drugih jugoslovanskih republik (prav tam: 243).

V izbranem obdobju so se ljudje iz različnih razlogov intenzivno preseljevali tako znotraj republik kot na medrepubliški ravni. Odnos uradne politike do notranje selitvene dinamike je bil odprt oziroma – kadar so bile nujne za vzpostavitev in normalizacijo družbenega, gospodarskega in političnega sistema – je nekatere med njimi aktivno spodbujal. Celotna selitvena dinamika se je povezovala predvsem s pomembnim geslom o bratstvu in enotnosti znotraj etnične/narodne raznolikosti in mobilnosti, oziroma so bile začasne pa tudi trajnejše migracije med drugim razumljene tudi kot eden od načinov izvajanja in vzpostavljanja sožitja med ljudmi.

## »NOVE« POVOJNE MEDNARODNE IZSELITVE

Iz dosedanjega prikaza je razvidna pestra povojna migracijska dinamika. Neposredna konkretna dinamika in postopki v praksi, sploh prehajanje državnih meja, pa so bili odvisni tudi od postopnega vzpostavljanja državnega sistema. Pri tem se spomnimo, da so bile od leta 1945 do šestdesetih let meje med Jugoslavijo in Avstrijo relativno zaprte, dovoljeni so bili le nadzorovani prehodi (Božič 2010), meje z Italijo so se bolj zaprle leta 1947 (Troha 2010: 437) in bile dokončno določene šele leta 1954, z Madžarsko pa so se odnosi zaostriili po informbiroju leta 1948. V skladu s tem moramo upoštevati, da so bili različni tudi režimi (ne)legalnega prehajanja državne meje s sosednjimi državami. Po Zakonu o gibanju na meji, ki je bil objavljen v Uradnem listu FLRJ novembra 1947, se je mejo lahko prestopalo na določenih mejnih prehodih in z veljavno pravno listino. Ilegalni oziroma nedokumentirani prestopi državne meje so bili vse do leta 1951 opredeljeni kot kaznivo dejanje. Leta 1951 pa je prišlo do omilitve kaznovalne politike in so bili individualni, neorganizirani ilegalni prehodi meje tretirani kot prekrški. Poleg v prejšnjih poglavjih že omenjenih legalnih prehajanj je prva leta po vojni prihajalo tudi do nedokumentiranih ali neregularnih prehajanj državnih meja. Ta prehajanja za čas po koncu vojne lahko razdelimo v dve obdobji: obdobje beguncev (o katerih sem že pisala), ki so odšli takoj ob koncu vojne in bili vse do razpada Jugoslavije razumljeni kot politična (sovražna) emigracija, in obdobje beguncev

– prebežnikov, ki so odšli med letoma 1948 in 1961 in bili sčasoma »prekvalificirani« v kategorijo t. i. ekonomskih izseljencev (Drnovšek 2010: 279; Božič 2010). Populacija prebežnikov je v selitvenih študijah v Sloveniji slabše raziskana, med drugim tudi zaradi pomanjkanja podatkov. Ocene o razsežnosti povojnega prebežništva se iz več razlogov, predvsem pa zaradi sistematične nedokumentiranosti, zelo razhajajo. Poudarja se, da so bili to pretežno mladi ljudje delavskega porekla, ki so med razloge za odhod za jugoslovansko stran selektivno navajale ekonomske dejavnike in avanturizem, za npr. avstrijsko stran pa politično situacijo v državi izvora, kar jim je zagotovilo posebno obravnavo (Božič 2010: 428).

Posebna skupina prebežnikov so tisti, ki so iz Slovenije/Jugoslavije zbežali zaradi ideoloških razhajanj po izključitvi Jugoslavije iz informbiroja leta 1948. Posledica radikalnega mednarodnega političnega spora Jugoslavije s Sovjetsko zvezo in z zvezo socialističnih držav so bili tudi ideološki in politični obračuni s t. i. informbirojevcem znotraj Jugoslavije/Slovenije. To je sprožilo prebege posameznikov, pozneje označenih za politično emigracijo, v vzhodnoevropske države. Večina jih je prebegnila v letih 1948–1951, del pa jih je ob resoluciji ostal v tujini, npr. uslužbenci na jugoslovanskih diplomatskih predstavništvi ali posamezniki na šolanju v Sovjetski zvezi. Leta 1968 so ugotavljali, da je bilo v vzhodnoevropskih državah 17.790 jugoslovanskih emigrantov, od tega samo 453 Slovencev, ki so se zatekli v Sovjetsko zvezo, Madžarsko, Čehoslovaško in Romunijo. Korenito spremembo odnosa do političnih emigrantov – informbirojevcev in s tem njihovega položaja je prinesel jugoslovanski Zakon o amnestiji leta 1962 (Drnovšek 2010: 261–262).

V petdesetih letih so poleg prebežništva ljudje odhajali z namenom združevanja družin. Leta 1950 so se pojavile želje po združevanju družin, katerih člani so bili iz različnih razlogov ločeni in so živeli v različnih državah. Jugoslovanske oblasti so v imenu združevanja družin dopuščale izselitev na podlagi vloženih prošenj. Prošnje so najprej obravnavali po posamičnih primerih. Ko je leta 1952 Zvezni sekretariat za notranje zadeve izdal dekret o urejanju izselitve družinskih članov, otrok in staršev vseh vojnih ujetnikov in oseb, ki so ali med drugo vojno ali v času osvoboditve zapustili državo, je sledila sistemska ureditev postopkov. Prošnje za pridobitev potnih listov za sorodnike političnih emigrantov so še vedno obravnavali posamično, to je individualno (Drnovšek 2010: 260–261). Sredi petdesetih let je sledil nov val izseljevanja, ki je zajel družinske člane v tujini živčih emigrantov, pridružili pa so se jim mnogi slovenski fantje, ki niso hoteli služiti vojaškega roka ali pa so nasprotovali političnemu sistemu v Sloveniji. V tem času že lahko rečemo, da so se politični ali ideološki vzroki za odhod že prepletali z ekonomskimi (*Slovenska kronika* 1996: 99).

Vzporedno z opisanimi odhajanjem pa je v letih 1956 in 1957, po zatrtju madžarske vstaje, v Slovenijo (in druge dele Jugoslavije) pribežalo večje število madžarskih beguncev, ki so bili nastanjeni v osmih begunskih taboriščih, lociranih v severovzhodnem delu Slovenije. Za večino je bila Slovenija le »prehodna postaja na poti v tretjo državo«, nekaj pa jih je ostalo pri nas (Kovacs 2017: 51–57).

Do začetka šestdesetih letih so bili vsi, »ki so ilegalno ali legalno, to je s potnimi listi, zapustili Jugoslavijo, označeni kot begunci oziroma politični emigranti« (Drnovšek 2001a: 2). Jugoslovanske meje so se v šestdesetih letih za izseljevanje veliko bolj odprle. Lahko rečemo, da se je liberalizacija intenzivneje začela z Zakonom o amnestiji (1962) in se nadaljevala s podpisom bilateralnega sporazuma o delovnih migracijah z Avstrijo (1963). Temu je sledilo obdobje organiziranih selitev (1965–1975), ki jih je podpirala tudi država. Sporazumu z Avstrijo so postopno sledili sporazumi s Francijo (1965), Kraljevino Švedsko (1967) in z ZRN (1969), potem pa še sporazumi z Nizozemsko, Belgijo, Luksemburgom in Avstralijo. Po gospodarski reformi leta 1965 je ZRN kmalu postala glavni cilj priseljevanja naših ljudi (Stare 1977: 8–12). To je bila v glavnem ekonomska migracija, za katero se je pri nas uveljavil poseben termin, to je »začasno delo v tujini«.

## ODNOS DO IZSELJENCEV, KI SO OSTALI V TUJINI, IN NJIHOVIH POTOMCEV

Velik del slovenskih izseljencev, ki so se izseljevali od druge polovice 19. stoletja, in njihovih potomcev je po drugi svetovni vojni še naprej ostal v tujini. Odnos do tistih, ki so ostali zunaj ali so odšli takoj po vojni, je bil že takoj po drugi svetovni vojni med pomembnejšimi političnimi osredotočenji tako na ravni Republike Slovenije kot državni jugoslovanski ravni. Povezan je bil s samo zgodovino odnosa do izseljencev v slovenskem prostoru, in to vse od Avstro-Ogrske, v jugoslovanskem prostoru pa od časa prve Jugoslavije. Razmislek o njih pa tudi aktivna (mednarodna) politika do izseljenih ljudi sta bila pomemben del politične prakse obeh omenjenih »starih« držav. Poleg zgodovinsko zakoreninjene politike in skrbi za aktiven odnos z izseljenci ter za ohranjanje njihove narodne identitete naj omenim dejstvo, ki je bilo po koncu druge svetovne vojne še pomembnejše, to je vloga, ki so jo imeli izseljenci med drugo svetovno vojno – glede na to jih je uradna politika delila na kolaborante in aktivne podpornike NOB.

Odklonilen odnos do kolaboracije oziroma jugoslovanske/slovenske politične emigracije je bil stalnica jugoslovanske politike vse do razpada države. Oznaka »emigracija« je imela številne pridevnike: sovražna, belogardistična, domobranska, fašistična, klerofašistična itd. V slovenskem političnem diskurzu je imel pojem emigracija negativno konotacijo, zato se je za druge izseljence iz časa pred drugo svetovno vojno uporabljala oznaka »stari izseljenci« (Drnovšek 2010: 255–256). Po drugi strani pa je bil odnos do »starih izseljencev« izrazito pozitiven, med drugim tudi zaradi močne in aktivne pomoči NOB-ju. Cilj je bil, da se tiste, ki so aktivno podpirali NOB, tesneje naveže na domovino. Zvezna vlada se je zavezala, da bo politične, gospodarske in socialne pravice svojih izseljencev zaščitila preko diplomatskih predstavništva v tujini. V skladu s cilji je bila pestra aktivnost v zvezi z ustanavljanji državnih/republiških teles in inštitucij, ki bi skrbeli za Slovence v tujini. Poskusi so bili bolj ali manj uspešni vse do leta 1951, ko je bila ustanovljena Slovenska izseljenska matica. Z

njeno ustanovitvijo se je začel graditi (jugoslovanski) model inštitucionalnega organiziranja dejavnosti na področju izseljenstva. Osrednjo vlogo so poleg matic, v našem primeru Slovenske izseljenske matice, dobile tudi druge t. i. družbenopolitične organizacije (npr. SZDL) z vodilno KPS (prav tam: 264–268). Princip samoupravnega organiziranja družbe je decentraliziral dejavnost, ki se je v skladu z obstoječim funkcioniranjem sistema nadgrajevala vse od krajevnih skupnosti preko občin, regij in republik do državne ravni.

## ZAKLJUČEK

Med vojno uničene, porušene države so se postopoma obnavljale – od neposredne prenove primarnih bivalnih razmer za prebivalce do ponovne vzpostavitve za obstoj države nujnih družbenih/državnih podsistemov (gospodarstva, šolstva, zdravstva, kulturnih dejavnosti itd.) in njihove nadgradnje v mednarodna (ne)sodelovanja in izmenjave med državami na globalni ravni. Hkrati pa je bilo treba takoj po vojni na mednarodni ravni urediti tudi vprašanje meja. Za Slovenijo kot severno jugoslovansko republiko, ki je mejila na Avstrijo, Italijo in Madžarsko, je bil ta postopek izjemnega pomena. Obmejna negotovost in ponovne »selitve meja« so kreirale dodatne pomembne okoliščine, ki so spodbudile selitve posameznikov, skupin ali celo populacij: etnično in ideološko različno opredeljenih – samoopredeljenih, družbeno opredeljenih ali politično prepoznanih za »pomembno drugačne«, takoj po vojni označenih s pojmom sovražniki. Še leta po vojni se je tako na ravni političnega kot tudi vsakdanjega življenja v besedišču političnega revanšizma obdržal iz vojne izvirajoči pojem »sovražnik«, ki je pomembno orodje (politične) stigmatizacije, razčlovečenja ter izključevanja posameznikov in skupin iz družbe. Vpetost v medvojne in povojne intenzivne lokalne, medrepubliške in mednarodne razmere je v Republiki Sloveniji pomembno vplivala tudi na notranjo in mednarodno selitveno dinamiko.

V prispevku so pregledno strukturirane prevladujoče selitvene prakse v Sloveniji, s poudarki na izbranih dejavnikih, ki so vplivali na selitveno dinamiko od konca vojne do liberalizacije jugoslovanske mednarodne migracijske politike v začetku šestdesetih let. Šele strnjen pregled obravnava, ki so pri nas običajno etnično vezane in zamejene, pokaže vso kompleksnost pojava v izbranem času: analizo kompleksne migracijske dinamike skozi odhode in izgone; prihode in vračanja; selitve meja in obmejno dinamiko; medrepubliško in znotrajrepubliško preseljevanje takoj po drugi svetovni vojni; prebege (informbirojevske, druge ideološko obarvane in bolj ekonomske); dovoljenja za združevanja družin; in po drugi strani begunce, ki so pri nas iskali varnost. Vse to pokaže, kako zapletena in dinamična so bila povojna leta oziroma povojno desetletje. Pri tem je ključno vlogo odigralo tudi dejstvo, da so bile slovenske (republiške) meje hkrati tudi zahodno- in severnojugoslovanske (državne) meje.

Pregled pokaže, da sta selitvena dinamika in odnos do nje večplastno pogojena: 1) lokalno – pri čemer sta ključni majhnost Slovenije in obmejnost večine slovenskih

regij, ki so, zgodovinsko gledano, gospodarsko čezmejno povezane; 2) nacionalno republiško – Slovenija je bila, poleg Hrvaške, republika, iz katere se je pred vojno izselilo največ ljudi (iz Slovenije so se od druge polovice 19. stoletja ljudje razseljevali tako po Jugoslaviji kot po državah Zahodne Evrope, v države na vzhodu, jugovzhodu in preko oceana), v zgodovini je bila izpostavljena številnim izgonom prebivalcev, raznarodovanju in izgubi ozemlja (selitvam meja); 3) medrepubliško oz. državno – Slovenija je bila kot razvitejši del Jugoslavije izpostavljena specifičnim pričakovanjem in, v povezavi z njimi, ukrepom, ki so pogosto krepili preseljevanja, odhajanja, vračanja ljudi; 4) mednarodno – Slovenija je bila kot »nosilka« zahodne in severne državne meje, ki ni bila le meja s sosednjimi državami z različno dinamiko odnosov skozi čas, ampak je bila med hladno vojno hkrati tudi meja z obema blokoma, postavljena v specifični položaj, ko je bila še bolj izpostavljena vplivom mednarodne politike in dobrega ali slabega položaja Jugoslavije v globalnih razmerjih moči.

Med drugo svetovno vojno in takoj po njej so bila vsa dogajanja vpeta v zmogovalne revanšistične odnose povojnega urejanja odnosov na vseh ravneh, od lokalne do globalne, kar je odločilno vplivalo tudi na migracijsko dinamiko. Totalnost druge svetovne vojne, nerešena vprašanja in politične ambicije ter njihova povezanost z nerešenimi vprašanji prve svetovne vojne so v ospredje postavljali pritiske nerealiziranih »ambicij« vojskujočih se držav. Te so vplivale tudi na percepcijo in družbeni položaj manjšinskih/etničnih skupin, ki so bile izpostavljene nasilnemu preseljevanju in begu. Zapletenost mednarodnih odnosov in globina konfliktov je krojila razmerja, tudi migracijska, še dolgo po drugi svetovni vojni. Zato naj nas ne čudi, s kakšno intenzivnostjo so politične dinamike in revanšizem določali migracije. Prej bi nas morda lahko začudilo, da je do otoplitve odnosov prišlo že po poldrugem desetletju, in to na način, da se je odnos do migracij relativno liberaliziral in je Jugoslavija, in s tem Republika Slovenija, postopno postala ena od najbolj odprtih držav na svetu.

## VIRI IN LITERATURA

- Božič, Maja (2010): Na poti v svet: Prebežniki severne meje 1945–1961. *Migracije in slovenski prostor od antike do danes* (ur. Peter Štih, Bojan Balkovec). Ljubljana: Zveza zgodovinskih društev Slovenije, 413–429.
- Bučar Ručman, Aleš (2016): Družbeno nadzorstvo in mednarodne migracije: Analiza nadzorstva od globalne do lokalne ravni. *Dve domovini / Two Homelands* 43, 11–22.
- Čebren Lipovec, Neža (2019): Post-War Urbanism along the Contested Border: Some Observations on Koper/Capodistria and Trieste/Trst. *Dve domovini / Two Homelands* 49, 199–220.
- 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, 301–306.

- Drnovšek, Marjan (2001): *Vzroki za izseljevanje Slovencev v zadnjih dveh stoletjih*, [http://www2.arnes.si/~krsrd1/conference/Speeches/Drnovsek\\_slo.htm](http://www2.arnes.si/~krsrd1/conference/Speeches/Drnovsek_slo.htm) (30. 4. 2019).
- Drnovšek, Marjan (2010): *Izseljevanje »rak rana« slovenskega naroda: Od misijonarja Friderika Barage do migracijske politike države Slovenije*. Ljubljana: Nova revija.
- Ferenc, Mitja (2010): Posledice izselitve kočevskih Nemcev in neizvedene kolonizacije Kočevske med vojno in po njej. *Migracije in slovenski prostor od antike do danes* (ur. Peter Štih, Bojan Balkovec). Ljubljana: Zveza zgodovinskih društev Slovenije, 528–549.
- Gombač, Jure (2005): *Esuli ali optanti? Zgodovinski primeri v luči sodobne teorije*. Ljubljana: Založba ZRC.
- Gombač, Jure (2006): Repatriacija v Slovenijo po koncu druge svetovne vojne. *Spet doma? Povratne migracije med politiko, prakso in teorijo* (ur. Marina Lukšič Hacin). Ljubljana: Založba ZRC SAZU, 13–33.
- Grafenauer, Danijel (2010): Koroški Slovenci – begunci in njihova družbena integracija v osrednji Sloveniji. *Migracije in slovenski prostor od antike do danes* (ur. Peter Štih, Bojan Balkovec). Ljubljana: Zveza zgodovinskih društev Slovenije, 474–486.
- Josipovič, Damir (2014): Slovenci na Balkanu skozi moderne popise prebivalstva 1880–2012. *Priseljevanje in društveno delovanje Slovencev v drugih delih jugoslovskega prostora: Zgodovinski oris in sedanost* (ur. Janja Žitnik Serafin). Ljubljana: Založba ZRC, 67–89.
- Kalc, Aleksej (2002): *Poti in usode: Selitvene izkušnje Slovencev z zahodne meje*. Koper: Zgodovinsko društvo za južno Primorsko: Znanstvenoraziskovalno središče Republike Slovenije, Trst: Narodna in študijska knjižnica.
- Kalc, Aleksej (2019): The Other Side of the "Istrian Exodus": Immigration and Social Restoration in Slovenian Coastal Towns in the 1950s. *Dve domovini / Two Homelands* 49, 145–162.
- Kovács, Attila (2017): Madžarsko begunsko vprašanje v Sloveniji 1956 in 1957. *Migracije: Zbornik strokovnih prispevkov za mentorje zgodovinskih krožkov* (ur. Tomaž Mikelj). Ljubljana: Zveza prijateljev mladine, 51–58.
- Kržišnik Bukić, Vera (2004): Slovenci v Beogradu. *Slovenski etnološki leksikon*, 1. izd. (ur. Angelos Baš). Ljubljana: Mladinska knjiga, 546.
- Lukić, Dijana (2017): »Drugega skoraj ne ostaja, ko zapustiti milo domovino in si drugje domovja iskati« ali kratek pregled migracijskih tokov Slovencev v Vojvodino. *Slovenika III*, 35–57.
- Lukšič Hacin, Marina (2018): Selitvena dinamika slovenskega prostora v zgodovinski perspektivi. *Dve domovini / Two Homelands* 48, 55–72.
- Nečak, Dušan (1985): *Koroški Slovenci v drugi avstrijski republiki (1945–1976)*. Ljubljana: Založba Borec.
- Pirjevec, Jože (2008): *»Trst je naš!« Boj Slovencev za morje (1848–1954)*. Ljubljana: Nova revija.

- Pelikan, Egon (2010): Izseljavanje Slovencev iz Julijske krajine med obema vojnama. *Migracije in slovenski prostor od antike do danes* (ur. Peter Štih, Bojan Balkovec). Ljubljana: Zveza zgodovinskih društev Slovenije, 366–374.
- Repe, Božo (2010): Izgon (usoda slovenskih izgnancev med leti 1941–1945). *Migracije in slovenski prostor od antike do danes* (ur. Peter Štih, Bojan Balkovec). Ljubljana: Zveza zgodovinskih društev Slovenije, 245–256.
- Slovenska kronika XX. stoletja 1941–1995* (1996). Ljubljana: Nova revija.
- Stare, Franc (1977): *Organiziranje zunanje migracije Slovencev*. Ljubljana: RI FSPN.
- Švent, Rozina (2007): *Slovenski begunci v Avstriji: 1945–1950*. Ljubljana: Založba ZRC.
- Toš, Marjan (2010): Migracije in mobilnost judovskega prebivalstva na Slovenskem. *Migracije in slovenski prostor od antike do danes* (ur. Peter Štih, Bojan Balkovec). Ljubljana: Zveza zgodovinskih društev Slovenije, 634–649.
- Troha, Nevenka (2010): Odseljavanje in prebegi Slovencev z območja, ki je bilo z mirovno pogodbo z Italijo leta 1947 priključeno k Ljudski republiki Sloveniji. *Migracije in slovenski prostor od antike do danes* (ur. Peter Štih, Bojan Balkovec). Ljubljana: Zveza zgodovinskih društev Slovenije, 432–446.

## SUMMARY

### THE POLITICAL CHARACTER OF MIGRATION AFTER THE SECOND WORLD WAR: FROM THE POLITICS OF REVANCHISM TO AMNESTY

Marina LUKŠIČ HACIN

In her paper, the author focuses on the dynamics of migration in the Republic of Slovenia (as part of the former Yugoslavia) in the immediate aftermath of the Second World War, or more precisely, during the period spanning the wartime and its conclusion to the years of the liberalisation of the Yugoslav international migration policy, linked to the 1962 Law on Amnesty, and to the agreement between SFR Yugoslavia and the Republic of Austria on the regulation of the employment of Yugoslav workers in Austria (1963). This period was profoundly shaped by the balance of power in international relations during and after the Second World War, when the former Allies started parting ways and wartime alliances gave way to competition, global bloc politics and, ultimately, the Cold War. In the case of Yugoslavia, these developments were compounded by the protracted process of delineating the borders with Italy and Austria, as well as Yugoslavia's expulsion from the Cominform, which set it on its alternative course outside the two blocs as the founding member of the Non-Aligned movement. These factors determined the conditions and dynamics of migration in Slovenia and former Yugoslavia.



# RELIGIOZNOST IN VELIKODUŠNOST DO MIGRANTOV

Marjan SMRKE<sup>1</sup>

COBISS 1.01

## IZVLEČEK

### Religioznost in velikodušnost do migrantov

Članek obravnava odnos med religioznostjo in velikodušnostjo do migrantov v sodobni Evropi. Teoretsko se navezuje na sociološko tradicijo proučevanja ambivalentnega odnosa religije do drugačnosti in na tradicijo proučevanja socialne distance do manjšin. Empirična raziskava temelji na podatkih Evropske družboslovne raziskave (ESS) iz let 2014 in 2016. Osredotoča se na analizo in razlago povezanosti med indikatorji vernosti in indikatorji velikodušnosti do migrantov na ravni celote 23 obravnavanih držav, po nekaterih skupinah držav in v zanimivejših primerih posamičnih držav. KLJUČNE BESEDE: migracije, religioznost, socialna distanca, velikodušnost, obramba kulture

## ABSTRACT

### Religiosity and Generosity Toward Migrants

This article deals with the relationship between religiosity and generosity toward migrants in contemporary Europe. Theoretically, it is based on the sociological tradition of researching the ambiguous relationship between religion(s) and "otherness", as well as the tradition of researching the social distances from social minorities. The empirical research is based on data from the European Social Survey (ESS) conducted in 2014 and 2016. It focuses on the analysis and explanation of the correlations between indicators of religiosity and indicators of generosity toward migrants on three levels: the entire sample (23 countries), clusters of countries, and selected individual countries.

KEY WORDS: migrants, religiosity, social distance, generosity, cultural defence

---

<sup>1</sup> Dr. sociologije, docent, visokošolski predavatelj, Fakulteta za družbene vede, Kardeljeva ploščad 5, SI-1000 Ljubljana; marjan.smrke@guest.arnes.si — Pričujoča raziskava je drugi del tridelne raziskave o odnosu med migracijami in religijo. Prvi del nosi naslov »Učinki migracij na sekularnost Evrope: Trije sociološki scenariji«. Objavljen je v drugi številki Teorije in prakse iz leta 2019. Predmet tretjega dela bo primerjava odnosov med religijo, religioznostjo in migracijami v Avstriji, na Češkem, Madžarskem in v Sloveniji.

## UVOD

Begunsko-migrantski val<sup>1</sup> iz let 2015 in 2016 je dodobra pretresel Evropo, zato se upravičeno imenuje migracijska kriza. Pojav je imel pomembne religijske vidike. Na eni strani je bila očitna religijska drugačnost migrantov, pretežno muslimanov. Na drugi strani sta se v evropskih tranzitnih ali imigrantskih družbah recepcija migrantov in interpretacija dogajanj v znatni meri odvijala skozi oživljeno prokrščansko retoriko, ki bi jo lahko šteli za nepristno »obrambo kulture«.<sup>2</sup>

Vrsto vprašanj odpirajo zlasti številne reference protimigrantsko razpoloženih populistov na religijo (ogrožena krščanska dediščina, ogrožena krščanska identiteta). Med njimi je vprašanje, v kakšnem odnosu so religioznost in stališča do migrantov oz. beguncev? Ali sklicevanje populistov na dediščino krščanstva pomeni, da moremo trditi, da so religiozni Evropejci do migrantov bolj negativno razpoloženi kot nereligiozni Evropejci? Nekateri raziskave, ki se stekajo v ugotovitev, da je skrajna desnica krščanstvo v tej zadevi »ugrabila« (npr. Marzouki, McDonnell, Roy 2016), kažejo, da so hitra sklepanja tu nezanesljiva. Nato so tu stališča verskih voditeljev: papeža Frančiška in številnih voditeljev protestantskih cerkva, ki so do migrantov odprta, solidarna in velikodušna. In spet stališča nekaterih voditeljev (škofov in drugih klerikov) istih cerkva, ki so izrazito, nekatera kar škandalozno odklonilna; tudi pri nas.<sup>3</sup> V tem primeru je smiselno govoriti o razcepu v vrhovih krščanskih cerkva, ki vzbuja zmedo. Podobna neskladja so očitna med evropskimi politikami, ki delujejo v strankah s krščanskim predznakom.

To nas napotuje na empiričnost. Toliko bolj, ker so dostopni kvalitetni podatki. V raziskavi skušam na osnovi analize podatkov iz raziskave ESS (European Social Survey) odgovoriti na vprašanje, v kakšnem odnosu sta religioznost in velikodušno stališče do migrantov.

- 
- 1 Med ukvarjanjem z migracijami sem naletel na uporabe izraza migrantski val z negativnimi konotacijami. Od njih se tu ogramujem. Ogramujem pa se tudi od mišljenja, da bi morali zaradi take kontaminiranosti to besedno zvezo opustiti. Val tu ne pomeni nič drugega kot izrazito kvantitativno spremembo pojava (porast) v razmeroma kratkem času – kot v mnogih drugih znanostih
  - 2 Z izrazom obramba kulture v sociologiji religije označujemo povečano identifikacijo z (tradicionalno) versko pripadnostjo kot posledico prihoda oz. vdora drugačevnih, konflikta z njimi in strahu pred njimi. »V obrambi kulture gre za situacije, ko so kultura, identiteta in občutek vrednosti na preizkušnji zaradi dejavnika, ki promovira bodisi drugo religijo ali sekularizem, ta dejavnik pa je negativno vrednoten« (Bruce 2011: 50). Smiselno je razlikovati med pristno in nepristno obrambo kulture. Za slednjo velja tista, ki temelji na imaginarnih nevarnostih, na neutemeljenih in politično induciranih strahovih.
  - 3 Izmed slovenskih klerikov se je v tem smislu izpostavil škof Peter Štumpf s stališčem, da je Slovenija do beguncev oz. migrantov naivna in »skrajno islamistična« (Štumpf 2015). O odzivu vrha RKC v Sloveniji na migrantsko krizo, zlasti o napetosti med krščansko humanističnim odnosom in protiislamskim identitarnim krščanstvom, analitično poglobljeno piše Andrejč (2018).

## RELIGIJE IN MIGRACIJE: RAZNOVRSTNOST TEMATIK

Tematika se uvršča na izjemno obsežno religiološko in sociološko področje. Za primerno umestitev ne bo odveč kratek razmislek o osnovnih možnostih raziskovalnega področja. Ena prvih religioloških možnosti je raziskovanje migracij v pripovedih velikih religij. Hain in Niazi (2016) menita, da je prisilna emigracija osrednje verske osebe in iskanje begunskega zatočišča ena pomembnejših pripovednih tem številnih svetovnih verstev.<sup>4</sup> Take posvečene paradigme (e)migrantov bi upravičevale domnevo, da so religiozni tu in zdaj posledično lahko bolj senzibilni do beguncev. Nato je tu možnost raziskovanja zaznamovanosti (začetnih ali poznejših) obdobja rasti nekaterih religij s prisilnimi migracijami, kot je to mogoče reči za (judovski) *galut*, 'diaspora', kot osnovo širjenja krščanstva v njegovi judovski fazi. V pripovedi religij po drugi strani spadajo tudi upravičevanja verskega zavojevanja po poti migracij in demografske prevlade – v povezavi z idejami svete vojne, obljubljeni dežele, poselitve, ki da jo narekuje božanstvo. Številni zgodovinski ekspanzionizmi so bili posledično versko motivirani oz. upravičevani. V sedanjem času je ta potencial religij lahko hrana za demografske strahove in panike populistov, denimo pred islamsko hiperksenezo. Migracij v duhovnem, spekulativnem smislu se tičejo verovanjske postavke religij, ki razpravljajo o migracijah nesmrtnih duš med tem in onim svetom oz. v verigi rojstev, smrti in ponovnih rojstev (v tem svetu) – kot je to zamisel transmigracije v hinduizmu.

Sociološka tema, ki jo zlasti raziskovalci religije obravnavajo kot dejavnika konfliktov, je religija kot dejavnik migracij: versko ali neverško motivirano zatiranje verskih manjšin je v zgodovini sprožilo vrsto emigracij versko drugačnega prebivalstva – in jih sproža tudi danes (Kolbe, Henne 2014). Na to se navezuje raziskovanje učinkov migracij na verski videz imigrantske družbe. Denimo v smislu pluralizacije: religijsko-kulturni vzorec ZDA, ki ga zaznamuje izjemna raznolikost, je nasledek dejstva, da so se iz Evrope v ZDA stekali preganjanci – pripadniki raznovrstnih verskih manjšin. Verske imigracije morejo učinkovati tudi na de/sekularizacijo na ravni zavesti – v emigrantski in imigrantski družbi. Kaufmann (2010) meni, da je prav zaradi verskih migracij novejšega datuma Evropa že dosegla sekularizacijski plato. Sledila naj bi rast vernosti zaradi višje rodnosti bolj vernih imigrantov. To vprašanje se tiče tudi učinkov imigrantske situacije na religioznost imigrantov. Imigrantska situacija lahko religioznost oz. versko identiteto okrepi (Lagrange 2014) ali pa jo ošibi. Že migracije same ljudi prisilijo, da ponovno premislijo svoje verske pripadnosti in prepričanja (Bruce 2011: 77). Konverzije v prevladujočo vero imigrantske družbe, kot je to videti tudi v aktualnem primeru konverzij sirske beguncev v krščanstvo v Nemčiji in Libanonu, niso redke.

Prav zadnja leta so v Evropi v porastu raziskovanja prenosa oz. retencije religioznosti od imigrantov prve generacije dalje, v veliki meri v okviru raziskovanja verske

4 Sem spadajo Budov odhod od doma, Mojzesov beg iz Egipta v judaizmu, beg Jezusove družine pred Herodom v krščanstvu, Mohamedova *hidžra* ('emigracija'). Pripomniti je treba, da sta stališča znanosti drugi in tretji primer bržkone le mita.

radikalizacije. Osupnila so namreč opažanja primerov radikalizacije v drugi generaciji islamskih imigrantov na evropskih tleh (Roy 2007). Ugotovitve so odvisne od proüčevanega okolja. Inglehart in Norrisova (2009) na skupnem vzorcu 22 evropskih in neevropskih družb ugotavljata relativno hitro prilagoditev islamskih imigrantov večinski kulturi imigrantske družbe: sčasoma so imigranti glede izbranega niza vrednot (enakopravnosti med spoloma, demokracije, seksualnosti) ravno na sredi med vrednotami izvirne emigrantske in imigrantske družbe. Lagrange opaža velike razlike v retenciji vernosti med imigranti prve generacije in njihovimi potomci v Franciji glede na njihov izvor (2014). Müller idr. glede nemških muslimanov turške narodnosti ugotavljajo, da se od prve do (skupaj) druge in tretje generacije delež fundamentalistično orientiranih razpolovi – z 18 na 9 odstotkov (2016: 13). Proučuje se raznovrstne stiske (i)migrantov v zvezi z izvirno religijo. Zanimivost: mnogi imigranti v prizadevanju, da bi se izmaknili stroškom stigmatizirane identitete, opustijo imena in priimke z etnično oz. religijsko konotacijo imigrantov in privzamejo »nevtralna« evropska imena (Khosravi 2011).

Raziskovanje odnosa med religioznostjo (v imigrantski družbi) in stališči do migrantov je v tem orisu le kamenček v mozaiku. A ima svoj pomen za razumevanje dinamike odnosov v prihodnje, ko je pričakovati nove migracijske pritiske iz ekonomsko nerazvitega in demografsko mladega sveta na razvito in starajočo se Evropo (Goldstone 2012: 29).

## RELIGIJE IN ODNOS DO MIGRANTOV

Kakšna naj bi bila pričakovanja glede učinkovanja religioznosti na odnos do migrantov? V kakšen teoretski okvir jih kaže postaviti? Ponujata se predvsem dva: razprava o religiji kot (de)integrativni družbeni sili in z njo povezana razprava o religiji in socialni distanci.

Sodobna razprava o integrativnosti religije se suče prav okrog ambivalentnosti religij. Religija lahko povezuje navznoter in ob tem navzven deluje razdruževalno, razdiralno. Sposobna pa je tudi preseganja vezanosti na ožjo skupnost in odprtosti navzven. Denimo v imenu nedeljene, skupne človeškosti (in človečnosti). Tovrstna »sposobnost« religij ali njen socialni kapital se tako deli na 'povezovalnost' (*bonding*) in 'premoščanje' (*bridging*), pri čemer se pojava lahko medsebojno izključujeta ali pa ne. Izključujeta se, ko je povezovalnost usmerjena predvsem navznoter.

Že s samim konceptom vernika, ki naj bi bil v nasprotju z drugimi podvržen prav določenim prepričanjem in praksi, religija uveljavlja razliko med notranjim in zunanjim. S tem je njeno možno delovanje dvojno: odprto v kohezijo in konflikt (McGuire 2002). Ločnica med verniki in neverniki je namreč lahko izključujoče narave. Tako Beck (2009): »Vera ima tako dve plati. Na eni strani povezuje enako verujoče prek vseh družbenih meja. Toda na drugi strani radikalno izključuje neverujoče in drugače

verujoče.« Vendar te izključujočnosti ne moremo kar posploševati. Religije, ki hočejo rasti, morajo biti vsaj malo odprte za premoščanje, ki vključuje tudi sinkretizacijo.

Vsekakor tovrstna ambivalentnost religij učinkuje tudi na socialno distanco religioznih do migranta (o tem več Smrke, Hafner Fink 2008). Smiselno je trditi, da religije z večjim potencialom premoščanja izražajo manjšo distanco do migrantov, medtem ko religije, ki uveljavljajo predvsem povezovalnost navznoter, do migrantov izražajo večjo distanco. Prav množične migracije utegnejo sprožiti pristno ali nepristno religijsko obrambo kulture, tj. okrepljeno povezovalnost navznoter, ki poveča distanco do drugačnega.

Tovrstna ambivalentnost religij se izraža tudi v samih svetih besedilih, ko ta obravnavajo osebo, ki je enaka ali podobna migrantu. S citati, ki izražajo naklonjenost do take osebe ali jo celo zapovedujejo, ni težav, ne ko gre za *Biblijo* ne ko gre za *Korana*; če se omejimo na religiji, ki sta v našem primeru najpomembnejši. Tujec oz. migrant v *Stari* in *Novi zavezi* je lahko tisti, ki mu je treba pomagati. V *Stari zavezi* se to nanaša predvsem na 'tujca (tujce)' kot *ger(im)* (npr. v Lev 19,33-34). V *Novi zavezi* je 'tujec' (*xenos*) upravičen do dobrotljive obravnave, ker je prav s svojim tujstvom podoben Jezusu (Mt 25,35)<sup>5</sup> (Marchetto 1989). V islamu je popotnik (*ibn al-sabeel*, to je 'sin ceste') upravičen do miloščine oz. pomoči. Kot v Kor 2: 177; 4: 36; 8: 41; 17: 26–27. Po drugi strani so kriteriji upravičenosti do dobrotljive obravnave v istih besedilih lahko skrajno zaostreni. »Bližnji«, ki je do nje upravičen, je v *Bibliji*, kot ugotavlja Clines (1995), lahko pojmovan skrajno ozko – kot (le) pravoverni pripadnik ustreznega rodu moškega spola. Kot *zar* ali *nekar* je tujec tisti, ki je sumljiv ali nevaren in zato neupravičen do ugodnosti, ki jih uživa domačin. Tako sta iz humane obravnave v skrajnem izključena in 'nepravoverni rojak' in 'tujec'. Podobne zaostritve v izbranih poglavjih *Korana* oz. njihovi interpretaciji so danes osnova različnih islamističnih ideologij, ki z območja hiše islama (v hišo vojne in med nevernike) izrivajo tudi večino muslimanov.

Migrant je lahko pripadnik iste ali druge vere. Tudi to določa distanco vernih prebivalcev imigrantske družbe do njega. Največji preizkus so prav situacije, ko je tujec očiten pripadnik drugačne vere, kar je značilno tudi za migrantsko-begunski val iz let 2015/16. Zato niso presenečali nekateri izrazi tovrstnega razlikovanja. Na Slovaškem, Cipru, v Bolgariji, na Češkem, v Estoniji in na Poljskem se je na najvišjih političnih ravneh izrazilo pripravljenost sprejemati krščanske begunce, ne pa nekrščanskih. To razlikovanje bržkone ni skladno s pojmovanjem odnosa do migrantov, kakršnega v moderni dobi od Pija XII. (z *Exsul familia* iz leta 1952) do današnjih dni na deklarativni ravni razvija Rimskokatoliška cerkev (RKC). Glede na povedano morajo biti pričakovana o religioznosti in distanci do migrantov odprta v različne možnosti.

5 Kajti lačen sem bil in ste mi dali jesti, žejen sem bil in ste mi dali piti, tujec sem bil in ste me sprejeli.

## RAZISKAVA: SO RELIGIOZNI MANJ VELIKODUŠNI DO MIGRANTOV?

Raziskava temelji na podatkih ESS.<sup>6</sup> Za medčasovne primerjave sem upošteval podatke izpred migracijskega vala (ESS 2014) in izza vrha migracijskega vala (ESS 2016). Poglavitne analize temeljijo na podatkih iz leta 2016, ko je že mogoče govoriti o učinkih. Obe raziskavi vsebujeta kazalce religioznosti in kazalce stališč do (i)migrantov.<sup>7</sup> ESS 2014 vsebuje celo poseben blok vprašanj o imigrantih, ki pa se žal le v skrčenem obsegu ponovijo v ESS 2016. Upoštevan je večji del držav EU, nekaj držav, ki niso članice, in Izrael. Nekatero državo so vključene le v eno od raziskav. Izostanejo nekatere države iz Jugovzhodne Evrope, ki bi bile spričo poteka migracijske poti še posebej zanimive. V ESS 2016 je bil numerus okoli 44.000.

Za kazalce, ki se nanašajo na religioznost, upoštevam versko pripadnost, obiskovanje verskih obredov in izjavljano vernost. Za poglavitni kazalec odnosa do migrantov in imigracij upoštevam petstopenjsko spremenljivko – indikator »država bi morala biti velikodušna pri reševanju prošelj za status begunca«. Uvrstiti jo je mogoče med indikatorje sedme stopnje sedemstopenjske kumulativne lestvice merjenja socialne distance do manjšin, kakršno je v sociologiji uveljavil Bogardus (glej Smrke, Hafner Fink 2008: 288–289). V smislu preverjanja zanesljivosti tega indikatorja upoštevam še nekatere druge spremenljivke iz ESS 2016.<sup>8</sup>

V primeru spremenljivke obiskovanje verskih obredov sem prvotnih osem kategorij združil v tri kategorije: v redne obiskovalce sem združil tiste, ki se verskih obredov udeležijo vsak dan, več kot enkrat tedensko ali enkrat tedensko; v občasne obiskovalce sem združil tiste, ki se obredov udeležijo vsaj enkrat mesečno, ob posebnih praznikih ali še manj pogosto; tisti, ki se jih nikoli ne udeležijo, so neobiskovalci.

Do (i)migrantov naklonjena stališča označujem z izrazom »velikodušnost«. Gre za opredelitve tistih, ki so se glede do (i)migrantov naklonjenih stališč (zlasti do osrednjega indikatorja) opredelili s stališčem »popolnoma soglašam« in »soglašam«. Opozoriti je treba, da seštevek teh dveh opredelitev ni povprečje v velikodušnosti znotraj kategorij, saj bi v izračun tega spadale še druge tri opredelitve petstopenjske lestvice. V razpravi se ne opredeljujem do tega, kakšna mera velikodušnosti (odprtosti) do migrantov bi bila za Evropo ali EU sociološko optimalna.

Raziskovalna vprašanja, na katera želim odgovoriti, so: Ali pripadniki verskih skupnosti izražajo manjšo ali večjo velikodušnost do migrantov kot nepripadniki? Ali

6 European Social Survey (ESS) je akademska mednarodna raziskava, ki se je začela leta 2001. Izvaja se jo vsaki dve leti.

7 Včasih uporabljam le besedo migranti, mestoma pa dodajam (i). Nekatera vprašanja v ESS se namreč tičejo migrantov, ki še niso postali imigranti, nekatera pa se tičejo ljudi, ki so že postali imigranti.

8 To je šest spremenljivk, ki merijo odnos do stališč: dovoliti bi morali prihod veliko ali malo migrantov iste rase oz. etnije kot je naša; dovoliti bi morali prihod veliko ali malo migrantom druge rase ali etnije; dovoliti bi morali veliko ali malo migracij iz drugih evropskih držav; imigracije so dobre ali slabe za gospodarstvo države; migranti ogrožajo kvalitetno življenje; imigranti naredijo več slabega kot dobrega za družbo.

redni obiskovalci verskih obredov izražajo višjo ali nižjo velikodušnost do migrantov kot neobiskovalci obredov? Kako se povezujeta religioznost in velikodušnost do migrantov? Kakšne so te razlike med državami in kako jih sociološko razumeti? Kako je v teh pogledih s Slovenijo?

Za poglobitve odgovore zadostujejo analize frekvenčnih porazdelitev oz. kontingenčne tabele in korelacijske analize. Moj namen namreč ni ugotoviti dejavnike takega ali drugačnega odnosa do migrantov. Vrednosti sem v primeru analize po državah uteževal z utežjo *design weight*; v primeru upoštevanja celote držav pa z utežmi *population-size weight* in *design weight*.

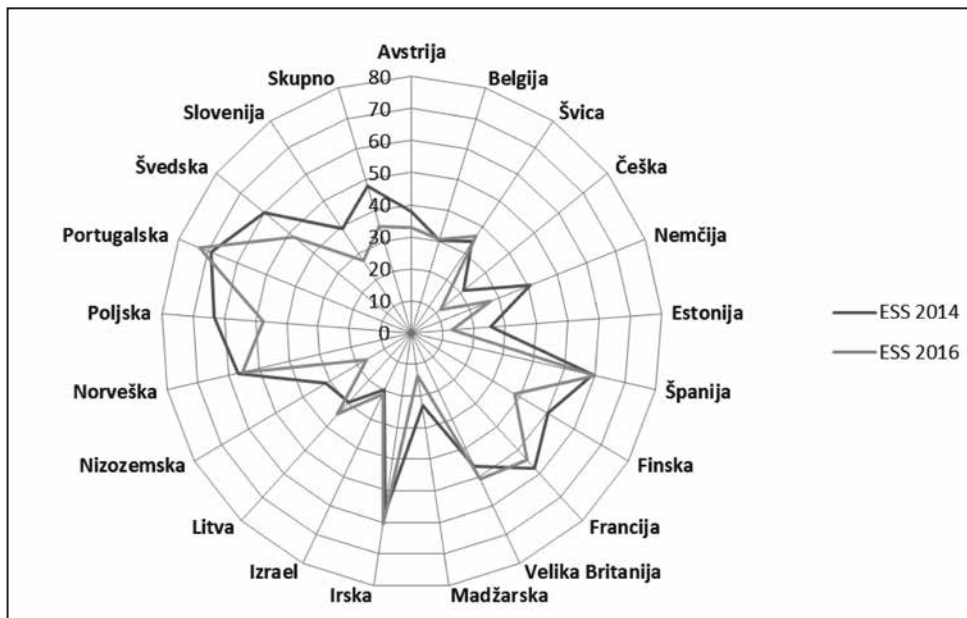
## UGOTOVITVE

V prvem koraku sem meril velikodušnost do (i)migrantov v letih 2014 in 2016. Upošteval sem le države, ki so sodelovale v obeh merjenjih. Za indikator velikodušnosti sem štel delež prebivalstva, ki soglaša s stališčem, da naj bo država velikodušna pri obravnavi prošelj za status begunca. Med časovnima točkama pred migracijskim valom in po njem se je močno znižala velikodušnost Evropejcev do migrantov: s 47,8 odstotka na 34,8 odstotka. Graf 1 prikazuje različna stanja v velikodušnosti med državami in njeno skrčenje. To pomeni, da je migracijski val vzbudil refleks zapiranja. Učinek je bil neenakomeren. Izrazito skrčenje je vidno v primeru Poljske, Finske, Estonije, Švedske, Slovenije, Nizozemske, Nemčije, Madžarske, Avstrije in Češke. V redkih primerih se stopnja velikodušnosti ni spremenila ali se je celo povečala. Zahodnoevropske družbe so praviloma izražale višjo velikodušnost od vzhodnoevropskih – pred upadom velikodušnosti in po njem; med slednjimi po nadpovprečni velikodušnosti izstopa Poljska.

V drugem koraku sem meril velikodušnost glede na versko ne/pripadnost. Pripadniki zajemajo 59,9 odstotka vzorca, nepripadniki 40,1 odstotka. Upošteval sem vse države, ki so bile vključene v ESS 2016. Možnosti sta bili predvsem dve: opazovanje razlik v velikodušnosti med državami z različno stopnjo verske pripadnosti in opazovanje razlik v velikodušnosti glede na versko ne/pripadnost na celotnem vzorcu in znotraj držav. Opozoriti velja, da (izjavljana) verska pripadnost v sociologiji religije ni šteta za zanesljiv kazalec religioznosti, saj obstajata pojava religioznost brez pripadnosti in pripadnost brez religioznosti.

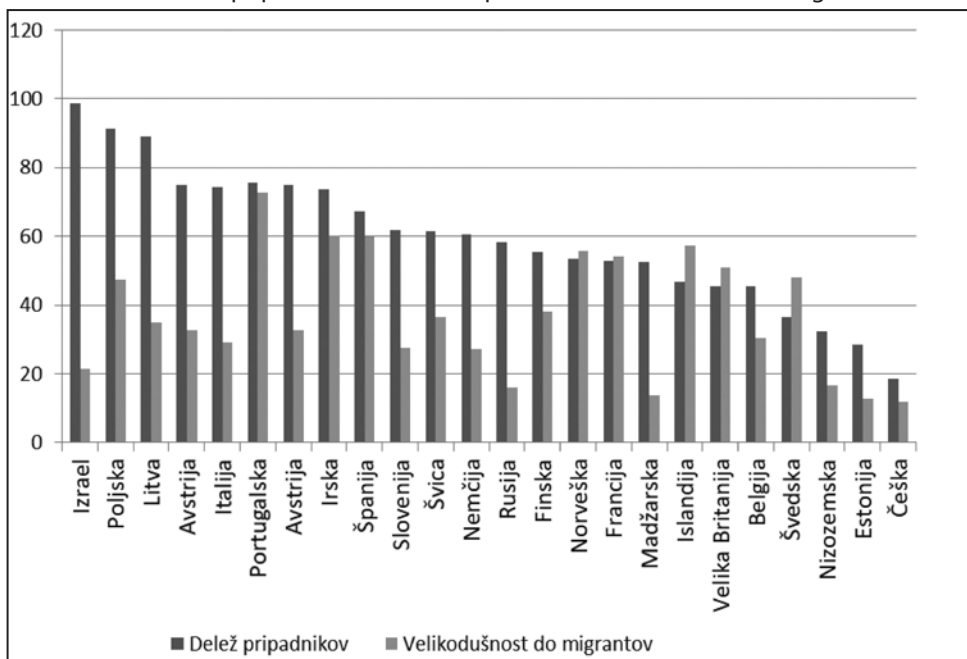
Razporeditev držav po količini verskih pripadnikov od največ k najmanj in primerjava z velikodušnostjo pokaže, kar pokaže tudi izračun ( $R^2 = 0,07$ ) – da pojava nista povezana (Graf 2). Opazen je pojav izrazito nizke velikodušnosti v nekaterih državah z nizko religiozno pripadnostjo (Češka, Estonija, Nizozemska). Hkrati so tu tudi države z nizko pripadnostjo in nadpovprečno stopnjo velikodušnosti (Norveška, Švedska, Francija, Islandija, Velika Britanija). In obratno: v državah z visoko pripadnostjo najdemo visoke (Portugalska) in nizke stopnje velikodušnosti (Izrael).

Graf 1: Velikodušnost do prosilcev za azil pred migrantskim valom in po njem



Vir: ESS 2014 in ESS 2016

Graf 2: Delež pripadnikov verske skupnosti in velikodušnost do migrantov

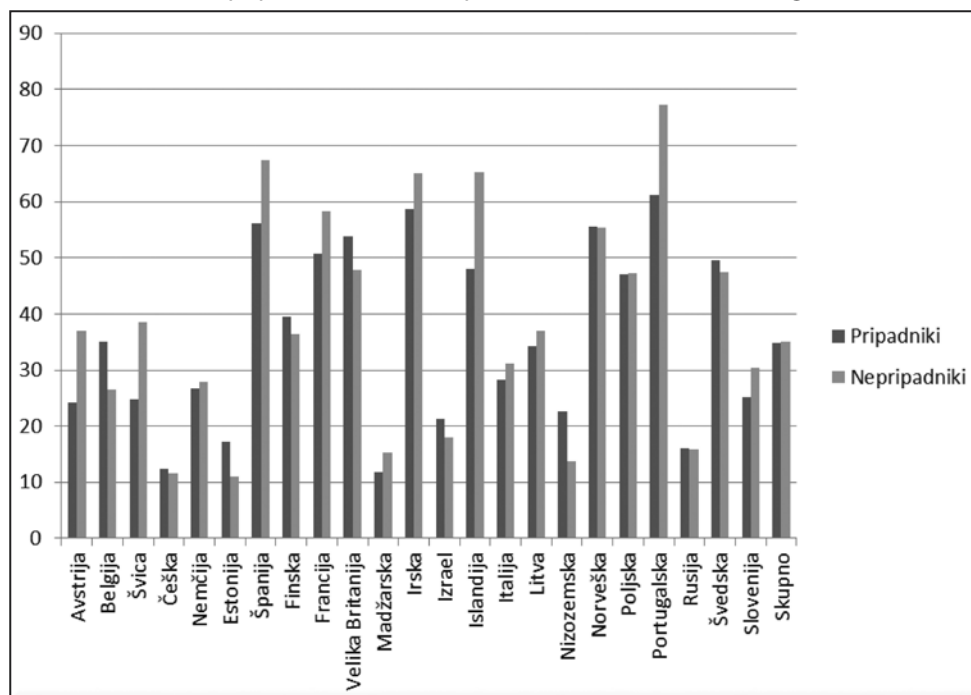


Vir: ESS 2016



Opazovanje razlik znotraj držav pokaže, da so razlike v velikodušnosti med pripadniki in nepripadniki praviloma majhne (izstopajo le Avstrija, Švica, Španija, Portugalska in Islandija z izrazito večjo velikodušnostjo nepripadnikov, in Belgija, Estonija in Nizozemska z izrazito večjo velikodušnostjo pripadnikov); vsekakor so večje razlike med istimi kategorijami različnih držav kot pa med obema kategorijama iste države. Razlika med najbolj velikodušnimi, to je portugalskimi nepripadniki, in najmanj velikodušnimi, to je estonskimi nepripadniki, je kar sedemkratna. V 13 od 23 držav so bolj velikodušni nepripadniki. Na Češkem, kjer je izmerjena najnižja velikodušnost, ni pomembnih razlik med pripadniki in nepripadniki. Na Portugalskem, ki izraža največjo velikodušnost, so izrazito bolj velikodušni nepripadniki. Na ravni celotnega vzorca razlik ni: velikodušnost izraža 34,9 odstotka pripadnikov in 35 odstotkov nepripadnikov.

Graf 3: Ne/pripadnost verski skupnosti in velikodušnost do migrantov

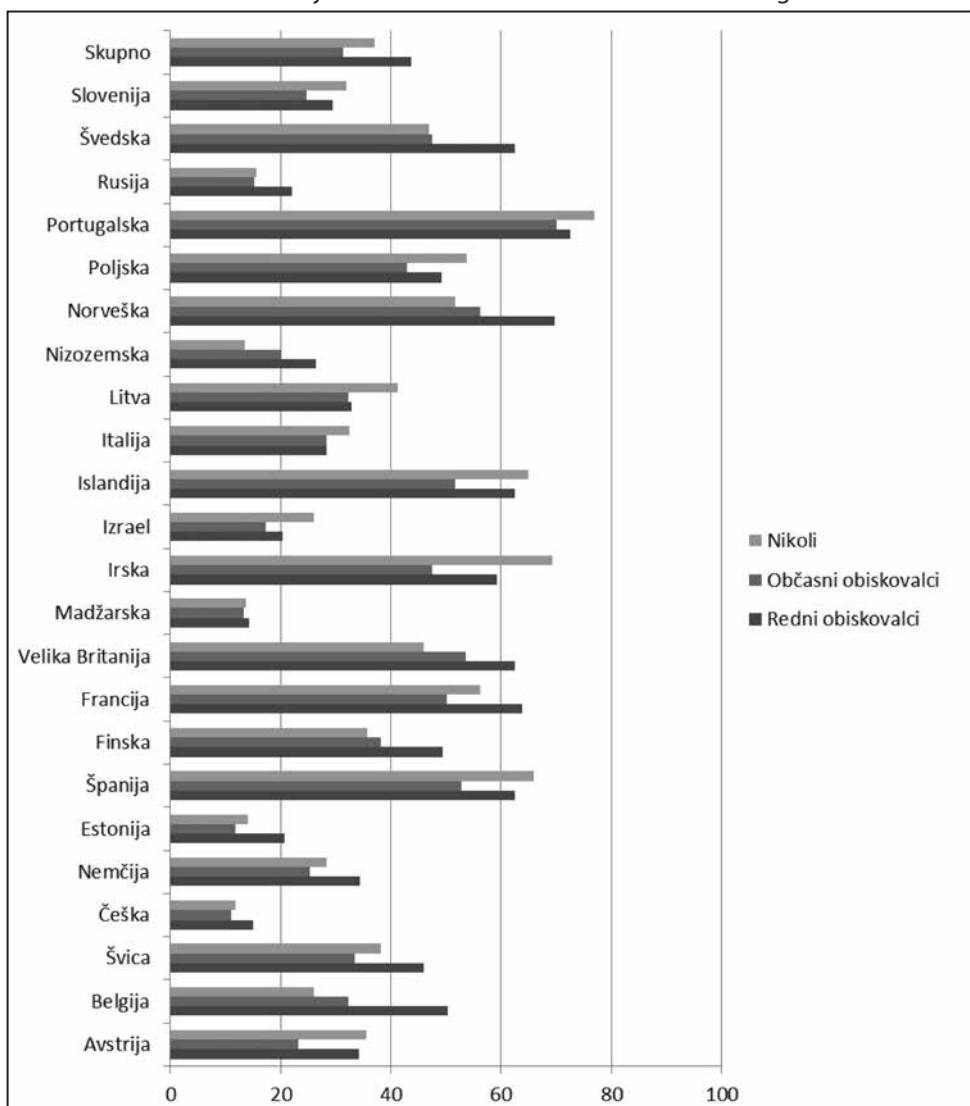


Vir: ESS 2016

Merjenje velikodušnosti glede na pripadnost različnim religijam oz. veroizpovedim pokaže, da so na ravni vseh držav skupaj najbolj velikodušni muslimani (45,3 odstotka), pripadniki vzhodnih religij (44 odstotkov) in »drugih krščanskih verstev« (42 odstotkov). Podobni so si katoličani (40,2 odstotka) in protestanti (38,5 odstotka). Najnižjo velikodušnost kažejo judje (19,7 odstotka) in pravoslavci (17 odstotka).

Razlike v velikodušnosti glede na obiskovanje verskih obredov sem opazoval tako, da sem ne/obiskovalce obredov razvrstil v tri kategorije. Redni obiskovalci na celotnem vzorcu oz. populaciji predstavljajo 13,1 odstotka prebivalstva, občasni 50,3 odstotka in neobiskovalci 36,5 odstotka. Iz Grafa 4 je razvidno, da redni obiskovalci verskih obredov v 13 državah od 23 izražajo večjo velikodušnost. V preostalih desetih primerih so to neobiskovalci. To pomeni, da občasni obiskovalci niso nikjer najbolj velikodušni. Temu ustrezen vtis daje tudi stanje na ravni vseh držav skupaj.

Graf 4: Obiskovanje verskih obredov in velikodušnost do migrantov



Vir: ESS 2016

Če primerjamo vse obiskovalce (redne in občasne) z neobiskovalci, so neobiskovalci velikodušnejši v primeru 14 držav; v štirih primerih ni omembe vrednih razlik; v petih primerih pa so bolj velikodušni obiskovalci. V nekaterih državah so razlike velike, v nekaterih pa nepomembne. Ugotoviti je mogoče tudi dokajšnjo skladnost teh rezultatov (po državah) z ugotovitvami glede ne/pripadnosti. Opazno je tudi, da so neobiskovalci v večini primerov velikodušnejši od neobiskovalcev v družbah s prevladujočo katoliško tradicijo (razen v Belgiji, Franciji in na Češkem); ni pa tako v protestantskih okoljih (z izjemo Islandije).

Izjavljana vernost je seveda najbolj neposreden kazalec vernosti. Ni pa zanesljiv kazalec cerkvenosti vernosti, saj dobršen del vernosti sodobnih Evropejcev obstaja v različnih oblikah avtonomne, selektivne, od cerkvenih oblik manj ali bolj distancirane vernosti. Zanesljivejši kazalec cerkvene vernosti je prej upoštevano obiskovanje verskih obredov (Bruce 2011: 15–16).

Spremenljivka, ki meri vernost, je enajststopenjska. Na celotnem vzorcu se je za možnost »sploh nisem veren« opredelilo 16,6 odstotka anketiranih. Opredelitev za možnost na drugi strani lestvice – »zelo veren« je s 5,4 odstotka druga najmanj pogosta. Analiza korelacije med spremenljivko vernosti in spremenljivko velikodušnosti pokaže, da spremenljivki nista povezani: povezava je sicer signifikantna (zaradi velikosti vzorca), vendar je ne moremo opredeliti niti kot šibko ( $r = 0,049^{**}$ ; signifikanca 0.0000;  $** p < 0.01$ ). Pogled na kontingenčno tabelo (Tabela 1) pa pokaže naslednjo zanimivost: rahlo večjo stopnjo velikodušnosti izražata obe skrajni kategoriji (»sploh nisem veren« in »zelo veren«), kar ustvari zelo blago U krivuljo, ki je še rahlo višja na strani zelo vernih.<sup>9</sup> Če primerjamo kategorijo »sploh ni veren« z vsemi desetimi stopnjami vernosti skupaj na ravni celote držav, ugotovimo, da neverni glede osrednje spremenljivke izražajo nadpovprečno velikodušnost (39,4 odstotka proti 34 odstotkom, ko je povprečje 34,5 odstotka). A hkrati izražajo tudi nekaj višje vrednosti najbolj odklonilnih stališč (17,8 odstotka proti 14,1 odstotka, ko je povprečje 14,4 odstotka). Ista kategorija izraža nadpovprečno velikodušnost v primeru celote držav s pretežno katoliško versko tradicijo in povprečno velikodušnost v izboru držav s pretežno protestantsko versko tradicijo.

Križanje dodatnih šestih spremenljivk (enajststopenjska ali štiristopenjska lestvica), ki se nanašajo na odnos do (i)migrantov, z verovanjsko spremenljivko ne pokaže nobenih omembe vrednih povezanosti na ravni celotnega vzorca. Izraža pa se zanimivost, da v kategorijah »sploh ni veren« in »zelo veren« v primeru petih spremenljivk (od šestih) najdemo tako nadpovprečne opredelitve za izrazito velikodušnost (zelo soglašam) do (i)migrantov kot nadpovprečne opredelitve za nevelikodušnost (sploh ne soglašam).<sup>10</sup> To po drugi strani pomeni, da se tisti, ki se glede vernosti opredeljujejo za vmesne možnosti, tudi glede odnosa do (i)migrantov

9 Kot je razvidno tudi iz Tabele 1, je ob tem kategorija zelo vernih zelo majhna. Predstavlja le 5,3 odstotka populacije.

10 Tega pojava ne bi opazili, če bi velikodušnost merili z izračunavanjem povprečnih vrednosti na osrednji spremenljivki-indikatorju.

nadpovprečno opredeljujejo za vmesne možnosti. Analize tovrstnih povezanosti po posamičnih državah sem opustil, saj si zaslužijo posebno predstavitev.

Tabela 1: Ne/religioznost in odnos do migrantov: Država bi morala biti velikodušna pri presojanju prošelj za status begunca

Država bi morala biti velikodušna ...	Močno soglašam	Soglašam	Niti niti	Ne soglašam	Sploh ne soglašam	Skupno	N =
<b>Sploh nisem veren</b>	13,5	25,9	21,1	21,8	17,8	100,0	8,363.7
1	9,2	25,4	24,3	27,1	14,0	100,0	2,701.6
2	7,9	23,5	24,9	26,5	17,2	100,0	3,593.7
3	5,8	24,1	27,3	25,6	17,1	100,0	4,192.4
4	5,0	23,0	29,8	28,0	14,2	100,0	3,137.8
5	6,6	24,2	29,0	26,1	14,2	100,0	7,825.6
6	6,4	25,9	27,9	27,2	12,6	100,0	5,264.2
7	7,4	28,1	26,4	24,5	13,6	100,0	5,581.1
8	9,0	30,8	26,3	21,3	12,6	100,0	4,691.0
9	9,7	30,8	27,4	20,5	11,8	100,0	1,865.3
<b>Zelo veren</b>	16,3	29,3	24,7	16,9	12,9	100,0	2,630.7
<b>Skupno</b>	8,7	26,2	26,1	24,3	14,7	100,0	49,847.2

Vir: ESS 2016

Slovenija leta 2014 izraža evropsko povprečno velikodušnost, leta 2016 pa znatno podpovprečno. Upad velikodušnosti je bil nadpovprečen. Pripadniki verskih skupnosti izražajo nižjo velikodušnost od nepripadnikov. Redni in občasni obiskovalci verskih obredov izražajo nižjo velikodušnost od neobiskovalcev. Sploh ne verni (ki predstavljajo 14 odstotkov prebivalstva) in zelo verni (ki predstavljajo 5,9 odstotka prebivalstva) izražajo rahlo nadpovprečno velikodušnost (prvi v 32,2 odstotka in drugi v 33,3 odstotka, ko je povprečje 27,4 odstotka) – v skladu z omenjeno rahlo U krivuljo. Vendar so oboji rahlo nadpovprečni (in medsebojno enaki) tudi kar zadeva izražanje najbolj nevelikodušnega stališča.

## INTERPRETACIJA UGOTOVITEV

Skrčenje velikodušnosti med letoma 2014 in 2016 ne preseneča, saj je v večjem delu evropskih držav migrantski val sprožil strahove. Ti so bili v dobršni meri politično konstruirani, inducirani, potencirani, instrumentalizirani. Izkazalo se je, da je protimigrantska retorika politično izjemno donosna (Halla, Wagner, Zweimüller 2017). To se

je izrazilo tudi kot uspeh populizmov na volitvah.<sup>11</sup> Menim, da je v opazovanju teh pojavov smiselno vztrajati pri razlikovanju med pristno obrambo kulture, ki izhaja iz resnične nevarnosti za staroselsko družbo, in nepristno obrambo kulture, ki temelji na induciranih strahovih.

Med bolj in manj velikodušnimi so države z manjšim in večjim deležem imigrantov, z večjim ali manjšim deležem beguncev, z manjšim ali večjim deležem muslimanov imigrantskega izvora. Francija in Nizozemska sta državi z relativno velikim deležem imigrantov, beguncev in muslimanov, ki izražata različni stopnji velikodušnosti. Med najbolj nevelikodušnimi je nekaj držav, v katerih je imigrantov, beguncev ali muslimanov le za vzorec. Razlike med Zahodno in Vzhodno (postkomunistično) Evropo se skladajo s prejšnjimi opažanji razlik v socialni distanci do družbenih manjšin (Smrke, Hafner Fink 2008: 297). Brez dvoma jih je mogoče razlagati tudi kot odsev slabših družbenoekonomskih razmer (na vzhodu).

Razlage razlik med državami bi terjale posebno raziskavo, ki bi me oddaljila od osnovnih ciljev. Pomudim naj se le pri ekstremih: Portugalska in Irska, ki tudi leta 2016 izražata visoko velikodušnost, celo rahlo povečano, sta državi z dolgo tradicijo emigrantskih izkušenj. Domnevamo lahko, da jih to senzibilizira za stiske migrantov. Glede Portugalske pa je videti, da ta javnomnenjska odprtost ne vodi v prakso sprejemanja beguncev; le še Slovenija jih je sprejela (absolutno in relativno) manj od Portugalske. Glede Češke, ki izkazuje najnižjo velikodušnost (ob tem pa je med najbolj distanciranimi do migrantov tudi na šestih drugih spremenljivkah-indikatorjih), Čulík (2017) meni, da so se na sindrom zgodovinskih razlogov nezaupanja do (drugačevernega) tujca v zadnjih letih navezale frustracije, izhajajoče iz sodobnih kapitalističnih razmer, in medijsko konstruirana protimigrantska pripoved. V njej so politiki, kot je predsednik Miloš Zeman, širše uveljavili klevetniški odnos do muslimanov.<sup>12</sup> Opozoriti velja, da je Češka v raziskavi, ki smo jo izvedli leta 2008, v primerjavi 13 vzhodnoevropskih držav izražala podpovprečno distanco do priseljencev in muslimanov (Smrke, Hafner Fink 2008: 292), zato se odpira teza o trenutnem vzdušju v državi kot določilnici odnosa do (i)migrantov. Podpirajo jo velike razlike v velikodušnosti med državami: te ne morejo biti le posledica razlik v običajnih socio-demografskih dejavnikih.

Glede na ohlapen odnos med pripadnostjo in vernostjo, pričakovanja glede morebitnih povezav pripadnosti z odnosom do migrantov niso bila velika. Po drugi strani bi lahko izpeljevali nekatera pričakovanja glede nepripadnikov. Nepripadniki so to v znatni meri postali iz bolj ali manj kritičnega odnosa do opuščene religije. Bi zato lahko pričakovali bolj zadržan odnos do migrantov, ki se jih večinoma povezuje z religijo? Ali pa naj bi od nepripadnikov pričakovali predvsem večjo odprtost, ker jih je od izvorne religije oddaljilo nezadovoljstvo nad ozkostjo do ideološko drugačnih? Ugotovitve potrjujejo razloge za obe domnevi.

11 Sem bi lahko prištevali volilne rezultate na Nizozemskem, v Avstriji, na Slovaškem, v Nemčiji, Italiji, na Češkem, Poljskem, Madžarskem, po mnenju nekaterih tudi v Sloveniji. Smiselne so trditve, da sem spada tudi brexit.

12 Teh je na Češkem le kakšnih 11.000, to je dobra tisočinka prebivalstva.

Nekatere razlike v velikodušnosti glede na pripadnost specifični religiji oz. veroizpovedi so deloma odraz dejstva, da se nekatere pripadnosti večinoma navezujejo na le eno državo in njene posebnosti. V primeru judaizma je to Izrael, v primeru pravoslavja Rusija. Prave vtise o specifični pripadnosti kot določilnici velikodušnosti bi dale šele primerjave med različnimi pripadnostmi znotraj držav. Vendar te primerjave v okviru vzorcev ESS niso mogoče: zato, ker so v Rusiji in Izraelu pripadnosti drugim veram premajhne (z izjemo islama, ki v obeh državah izkazuje višjo velikodušnost), in zato, ker so vzorci pravoslavnih in judov v drugih državah premajhni. V primeru judaizma in pravoslavja ne moremo izključiti možnosti, da relativno nizka velikodušnost izhaja iz dejstva, da gre za etnični religiji. Religije, ki nacionalno pripadnost nadpovprečno povezujejo z religiozno pripadnostjo, imajo bržkone nižje potenciale za premoščanje. Ugotovitev, da največjo velikodušnost izražajo (evropski) muslimani, ne preseneča: izhaja iz dejstva, da so evropski muslimani predvsem imigranti oz. potomci imigrantov in da so (i)migranti iz vala 2015/16 predvsem muslimani, njihovi soverci.

Odnos med obiskovanjem verskih obredov in velikodušnostjo preseneti z raznovrstnostjo konstelacij. Pravilo je le to, da občasni obiskovalci niso nikjer najbolj velikodušni. Preizkus z združevanjem ustvarjenih kategorij (neobiskovalci vs. vsi obiskovalci) pokaže, da bi bilo morda boljše oblikovanje kategorij, ki bi si bile velikostno bolj podobne. Pogostejšo višjo velikodušnost (po državah) rednih obiskovalcev lahko namreč pripišemo tudi relativni majhnosti kategorije. S tem pa ne izključujemo interpretacije, da je nadpovprečna velikodušnost te kategorije nasledek (humanistične, v premoščanje usmerjene verzije) krščanske etike, kakršno morda dosledneje privzemajo cerkveno verni.

Posebnost katoliških okolij, kjer so neobiskovalci največkrat najbolj velikodušni, pojasnujem z značilnostmi t. i. katoliškega (latinskega) religijsko-kulturnega vzorca (Martin 1978). Zanj je bila zgodovinsko značilna polarizacija na klerikalne in protiklerikalne družbene sile. Pri tem so slednje v nasprotovanju konservativni verski tradiciji razvile in zastopale bolj liberalne, odprte družbene vrednote, ki so bližje premoščanju. To interpretacijo podpira opažanje, da se velikodušnost do migrantov na celotnem vzorcu zmerno pozitivno povezuje z levičarsko politično orientacijo ( $r = 0.190^{**}$ ; Sig. 0.000;  $** p < 0.01$ ;  $N = 37.850$ ), kar je očitno tudi v izboru katoliških okolij. Nasprotno značilnost protestantskih okolij bi si okvirno lahko razlagali kot izraz odsotnosti tovrstne polarizacije.

Glede ne/vernosti in velikodušnosti se razlike uveljavljajo šele po segmentih, izbranih kategorijah in državah. Obravnava na ravni celote držav očitno izravna (skrije) tovrstne razlike. Opažanje, da nekaj več velikodušnosti oz. nekaj več potenciala premoščanja pokažejo povsem neverni in zelo verni, kaže razumeti kot učinek dveh delujočih ideologij: sekularno-humanistične in humanističnih verzij različnih krščanstev. Vse so sčasoma razvile utemeljitve za odprtost do drugačnosti. Toda hkrati obstajata druga obraza teh ideologij, ki sta bržkone tudi v ozadju rahlo večje distanciranosti do migrantov. To pomeni, da moramo v interpretacijo privzeti možnost ambivalentnega učinkovanja teh ideologij. Kar zadeva krščanstvo, je ta ambivalentnost očitno tudi podlaga uvodoma opažene bifurkacije.

Slovenski upad velikodušnosti med letoma 2014 in 2016 je treba razumeti tudi kot odsev dejstva, da je bila Slovenija tranzitna država. Čas tranzita migrantov so zaznamovali porast strahu in celo izrazi panike. Dogajanje je dodobra pretreslo tudi vrh RKC (Andrejč 2018). Opažanje, da so nepripadniki, neobiskovalci in neverni velikodušnejši od pripadnikov, obiskovalcev in vernih (ne pa od ozke kategorije zelo vernih), so skladne s poprejšnjim raziskovanjem vernosti in socialne distance do manjšin (Smrke, Hafner Fink 2008). To je v drugih podatkih in v drugi časovni točki (EVS 1999/2000) pokazalo, da so neverni Slovenci, predvsem pa »prepričani ateisti«, do sedmih izbranih manjšin (vključno z imigranti) bistveno manj distancirani kot pa verni Slovenci. Tu bi ponovil stališče, da v slovenskem družbenem prostoru katoliška kultura do raznih manjšin reproducira določene predsodke, ki jim nasprotuje bolj odprta libertarno-sekularna kultura. Med vernimi je krščanski humanizem (v smislu premoščanja) opazneje zaznaven predvsem v ozki kategoriji zelo vernih.

## SKLEP

Raziskava je pokazala, da religiozni na ravni celote upoštevanih držav, vključenih v ESS 2016, ne izstopajo po velikodušnosti. Praviloma ne izstopajo niti v smeri izrazito manjše velikodušnosti. To pomeni, da moramo na vprašanje, ali so religiozni manj velikodušni do migrantov, na tej ravni obravnave vprašanja odgovoriti negativno. Pomembne razlike v obe smeri se uveljavljajo šele na ravni posameznih držav. So države, kjer se bolj velikodušno do (i)migrantov izražajo nepripadniki, neobiskovalci verskih obredov in neverni, in so države, kjer se bolj velikodušno izražajo pripadniki, obiskovalci obredov in verni. Obstajajo tudi skupine držav ali segmenti prebivalstva, kjer se izražajo pomembne razlike: v okviru katoliških okolij so do tujcev praviloma manj distancirani nepripadniki verskih skupnosti in neobiskovalci verskih obredov. Določeni učinek krščanskega humanizma je zaznati šele v ozki kategoriji zelo vernih. Drugače je v tradicionalno protestantskih okoljih, kjer se izraža nekaj višja velikodušnost pripadnikov oz. obiskovalcev verskih obredov (v primerjavi z nepripadniki oz. neobiskovalci).

Nekatere ugotovitve se ne skladajo najboljše z drugimi novejšimi raziskavami. Nujno je treba omeniti raziskavo »Being Christian in Western Europe«, ki jo je leta 2017 opravil Pew Research Center (od tu PRC) (N = 24,599). Ugotovljena je bila močna povezanost med religijo oz. religioznostjo in distanco do migrantov: »Krščanska identiteta se v Zahodni Evropi povezuje z visoko stopnjo negativnih čustev do imigrantov. Kristjani v večji meri izražajo negativne poglede na imigrante kot nepripadniki Cerkva« (PRC 2017: 9). »Izraža se jasen vzorec: prakticirajoči in neprakticirajoči kristjani so bolj kot nepripadniki nagnjeni k izražanju protimigrantskih in protimanjšinskih stališč« (prav tam: 20), čeprav so tudi med njimi negativna stališča manjšinska. To velja tudi ob kontroli dejavnikov, kot so starost, izobrazba, spol, ugotavljajo avtorji (prav tam: 22).

Različnosti ugotovitev si ne kaže razlagati z drugačnim izborom držav (v primeru PRC je to 15 zahodnoevropskih držav), temveč predvsem z drugačnimi spremenljivkami- indikatorji socialne distance oz. velikodušnosti. V raziskavi PRC je upoštevanih pet spremenljivk: te so znatno bolj usmerjene na muslimane, saj jih dvakrat izrecno omenjajo, enkrat omenjajo imigrante bližnjevzhodnega izvora in enkrat jude. Najbrž prav s to konkretizacijo (i)migranta – muslimana pri nekaterih kristjanih prebudijo negativna čustva. V nasprotju z našo osrednjo spremenljivko-indikatorjem, ki sprašuje po splošnem odnosu do beguncev. Smiselnost te domneve potrjuje analiza odnosa med religioznostjo in tremi kazalci socialne distance iz ESS 2014 (vprašanja niso bila ponovljena v ESS 2016). Ko je imigrant v ESS konkretiziran kot musliman, jud ali Rom, zelo verni na ravni celotnega vzorca izrazijo opazno nižjo velikodušnost oz. opazno višjo distanco kot pa neverni.<sup>13</sup> Povedano seveda napotuje na kritičen premislek o izboru indikatorjev.

Glede na demografske napovedi bo do Evrope seglo še veliko migracijskih valov. To pomeni, da bo tu še veliko preizkušenj »velikodušnosti« in preudarnosti evropskih religij in primerljivih sekularnih ideologij. Kot bo tu tudi veliko preizkušenj za raziskovalce tovrstnih odnosov.

## LITERATURA IN VIRI

- Andrejč, Gorazd (2018). Infiltrators, Imposters, or Human Beings? The Slovenian Socio-political Imaginary, Christianity, and the Responses to the 2015–2016 Migrant Crisis. *Religion in the European Refugee Crisis* (eds. Ulrich Schmidel, Graeme Smith). New York: Palgrave Macmillan, 39–60.
- Beck, Ulrich (2009). *Državni socializem je za bogate, reveži so še vedno na trgu* (intervju). *Dnevnik*, 7. 1. 2009, <https://www.dnevnik.si/1042237136> (4. 7. 2018).
- Bruce, Steve (2011). *Secularization*. Oxford: Oxford University Press.
- Clines, David (1995). Interested Parties: The Ideology of Writers and Readers of the Hebrew Bible. *Journal for the Study of the Old Testament* 205, 26–45.
- Čulik, Jan (2017). *Why is the Czech Republic so Hostile to Muslims and Refugees?*, <https://www.europenowjournal.org/2017/02/09/why-is-the-czech-republic-so-hostile-to-muslims-and-refugees/> (5. 7. 2018).
- ESS Round 7: *European Social Survey Round 7 Data* (2014). Data File Edition 2.1. NSD – Norwegian Centre for Research Data, Norway – Data Archive and Distributor of ESS Data for ESS ERIC.
- ESS Round 8: *European Social Survey Round 8 Data* (2016). Data File Edition 2.0. NSD – Norwegian Centre for Research Data, Norway – Data Archive and Distributor of ESS Data for ESS ERIC.

13 Na celotnem vzorcu nobenega muslimana v svojo državo ne bi sprejelo 19 odstotkov sploh ne vernih in 26,4 odstotka zelo vernih; nobenega juda 9,1 odstotka sploh ne vernih in 14,0 odstotka zelo vernih; nobenega Roma 25,3 odstotka sploh ne vernih in 30,9 odstotka zelo vernih.



- Goldstone, Jack (2012). Demographics and Migration. *Megatrends in Global Interactions*. Gutersloh: Verlag Bertelsmann Stiftung, 15–52.
- Halla, Martin, Wagner, Alexander F., Zweimüller, Josef (2017). Immigration and Voting for the Far Right. *Journal of the European Economic Association* 15/6, 1341–1385.
- Hein, Jeremy, Niazi, Tarique (2016). The Primordial Refugees: Religious Traditions, Global Forced Migration, and State-society Relations. *International Sociology* 3/6, 726–741.
- Inglehart, Ronald, Norris, Pippa (2009). Muslim Integration into Western Cultures Between Origins and and Destinations. HKS Working Papers No. RWP09-007, <http://dx.doi.org/10.2139/ssrn.1354185> (3. 6. 2018).
- Kaufmann, Eric (2010). *Shall the Religious Inherit the Earth: Demography and Politics in the Twenty-first Century*. London: Profile Books Ltd.
- Khosravi, Shahram (2011). White Masks/Muslim Names: Immigrants and Name-Changing in Sweden. *Race & Class* 53/3, 65–80.
- Kolbe, Melanie, Henne, Peter S. (2014). The Effect of Religious Restrictions on Forced Migration. *Politics and Religion* 7, 665–683.
- Lagrange, Hugues (2014). The Religious Revival Among Immigrants and their Descendants in France. *Revue Française de Sociologie* 55/2, 201–244.
- Marchetto, Ezio (1989). The Catholic Church and the Phenomenon of Migration: An Overview. *CMS Occasional Papers: Pastoral Series* 10, 1–26.
- Martin, David (1978). *A General Theory of Secularization*. New York: Harper & Row.
- Marzouki, Nadia, Mc Donnell, Duncan, Roy, Olivier (eds.) (2016). *Saving the People: How Populists Hijack Religion*. London: Hurst & Company.
- McGuire, Meredith (2002). *Religion: The Social Context*. Belmont: Wadsworth Thompson Learning.
- Müller, Olaf, Pollack, Detlef, Rosta, Gergely, Dieler, Anna (2016). *Integration and Religion as Seen by People of Turkish Origin in Germany*, [https://www.uni-muenster.de/imperia/md/content/religion\\_und\\_politik/aktuelles/2016/06\\_2016/study\\_integration\\_and\\_religion\\_as\\_seen\\_by\\_people\\_of\\_turkish\\_origin\\_in\\_germany.pdf](https://www.uni-muenster.de/imperia/md/content/religion_und_politik/aktuelles/2016/06_2016/study_integration_and_religion_as_seen_by_people_of_turkish_origin_in_germany.pdf) (5. 5. 2018).
- Pew Research Center (2018). *Being Christian in Western Europe*, <http://www.pewforum.org/2018/05/29/being-christian-in-western-europe/> (3. 7. 2018).
- Roy, Olivier (2007). Islamic Terrorist Radicalisation in Europe. *European Islam – Challenges for Society and Public Policy* (eds. Samir Maghhar, Amel Boubekeur, Michael Emerson). Brussels: Centre for European Policy Studies, 52–60.
- Smrke, Marjan, Hafner Fink, Mitja (2008). (Ne)religioznost in socialna distanca do izbranih družbenih manjšin v postsocialistični Evropi. *Teorija in praksa* XLV/3–4, 285–300.
- Štumpf, Peter (2015). *Lažje je biti prekmurski Slovenec na Madžarskem kot pa v skrajno islamistični Sloveniji. Spletna stran murskosoboške škofije*, <http://www.skofija-sobota.si/-lazje-je-bit-prekmurski-slovenec-na-madzarskem-kot-pa-v-skrajno-islamisticni-sloveniji-5278> (3. 7. 2018).

## SUMMARY

### RELIGIOSITY AND GENEROSITY TOWARD MIGRANTS

Marjan SMRKE

We conducted empirical research in order to establish the characteristics of the relationship between religiosity and attitudes towards migrants, using data from the European Social Survey. The variable “the government should be generous when evaluating applications for refugee status” was taken as an indicator of generosity when the answers were “strongly agree” or “agree”. Three variables were taken as indicators of religious belonging, religious observance and religiosity.

We concluded that generosity decreased considerably between 2014 and 2016; that there is no difference in generosity between adherents to religious communities and non-adherents at the level of the entire sample; that there are differences in generosity between adherents and non-adherents in the individual countries; in societies with a Catholic imprint, non-adherents as well as non-attenders tend to be more generous. This is not the case in most societies with a Protestant imprint; that there are differences between religions: Muslims express the highest and Orthodox adherents the lowest degree of generosity; that regular attenders of religious services at the level of all countries and in most of the countries express higher generosity than occasional attenders and non-attenders. However, if we compare non-attenders to attenders in general, the former seem to be slightly more generous; that there is no substantial correlation between religiosity and generosity at the level of the entire sample; and that the categories “not at all religious” and “very religious” express a slightly higher degree of generosity at the level of the entire sample. However, in the case of some countries and certain other variables/indicators they also express slightly higher levels of non-generosity. In the case of Slovenia, we find non-adherents, non-attenders and nonbelievers in general to be more generous than their religious counterparts. However, a rather narrow category of the “very religious” is slightly more generous than the general population. At the end we critically evaluate our results and compare them with the results of a survey conducted by the Pew Research Center (“Being Christian in Western Europe”).

# IZKUŠNJE BIVANJA IN DELA SODOBNIH SLOVENSКИH IZSELJENCEV V AVSTRIJI IN NEMČIJI

Maja GOSTIČ<sup>1</sup>

COBISS 1.01

## IZVLEČEK

### **Izkušnje bivanja in dela sodobnih slovenskih izseljencev v Avstriji in Nemčiji**

Članek obravnava subjektivno zaznavanje položaja izseljenih iz Slovenije med letoma 2014 in 2017. Poglobljeno je predstavljena izkušnja njihovega bivanja in dela v Avstriji in Nemčiji, ki sta prostor najbolj množičnega sodobnega izseljevanja iz Slovenije. Subjektivne izkušnje migrantov so ob podpori objektivnih statističnih podatkov pomembne za razumevanje celostne slike sodobnih ekonomskih migracij. Namen raziskave je bil pridobiti čim več informacij o migracijski izkušnji s stališča današnjega časa, pojava globalizacije in mobilnosti. Raziskava je pripomogla k razumevanju sodobnih motivov in izkušenj izseljevanja v prostoru Evropske unije.

**KLJUČNE BESEDE:** sodobni slovenski izseljenci, Avstrija, Nemčija, subjektivne izkušnje, ekonomske migracije

## ABSTRACT

### **The Experience of Living and Work of Contemporary Slovenian Emigrants in Austria and Germany**

The article deals with the subjective perceptions of emigrants that left Slovenia between 2014 and 2017. Their experiences of their stay in Austria and Germany, which are the most popular destinations for contemporary emigrants from Slovenia, are presented in depth. The subjective experiences of migrants are important for understanding the broader picture of contemporary economic migration with the support of objective statistical data. The purpose of the research was to obtain as much information as possible on the migration experience from the perspective of our contemporary times affected by globalization and mobility. The research contributes to an understanding of the contemporary motives for and experiences of emigration in the EU.

**KEY WORDS:** contemporary Slovenian emigration, Austria, Germany, subjective experiences, economic migration

<sup>1</sup> Mag. psih., mlada raziskovalka in asistentka, Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, Novi trg 2, SI-1000 Ljubljana; maja.gostic@zrc-sazu.si — Prispevek je nastal v okviru programske skupine »Narodna in kulturna identiteta slovenskega izseljenstva v kontekstu raziskovanja migracij« (P5-0070), ki ga financira Javna agencija RS za raziskovalno dejavnost.

## UVOD

V zadnjih desetletjih je raziskovanje subjektivnih izkušenj migracijskih procesov na podlagi osebnih pripovedi postalo eno pomembnejših konceptualnih in metodoloških usmeritev v preučevanju migracij (Milharčič Hladnik 2017: 78). Za razumevanje njihovega pomena so namreč ključne izkušnje, zgodbe in pričevanja tistih, ki so migrirali. Halfacree in Boyle (1993) poudarjata vpetost migracije v tok vsakdanjega življenja, ki vpliva na migrantovo konstrukcijo realnosti in zaznavanje lastnega položaja. Za celostno razumevanje izkušenj migrantov moramo upoštevati tudi njihovi osebni preteklost in prihodnost znotraj širšega kulturnega konteksta (Mlekuž 2004: 40). Migrante lahko razumemo kot kompleksne in kontradiktorne subjekte, katerih izkušnje so opredeljene bolj družbenopolitično kot pa demografsko ali ekonomsko (Findlay, Graham 1991). Na področju proučevanja slovenskega izseljenstva primanjkuje sodobnih študij, ki bi se ukvarjale z njihovo izkušnjo življenja v tujini. Prav tako je ta problematika v političnih in medijskih diskurzih pogosto predmet poljudnih posploševanj in preneglih sklepanj. S tega stališča je pomembno ključna vprašanja slovenskega izseljenstva pogosto postavljati in konsistentno naslavljanje, in to v različnih časovnih obdobjih. Relevantnost preučevanja subjektivnih zaznav se jasno pokaže ob dejstvu, da so interpretacije realnosti lahko zelo različne (Jahedi, Mendez 2014). S tem namenom je v prispevku prikazana tako kvantitativna kot kvalitativna podoba trenutnega stanja in trendov izseljevanja v Sloveniji.

Izhodišče pričujoče raziskave so najštevilčnejša skupina sodobnega slovenskega izseljenstva v dveh najpogostejših državah izseljevanja – mladi migranti med dvajsetim in štiridesetim letom starosti v Avstriji in Nemčiji. Ob določanju razlogov za posameznikov odhod se prepleta mnogo različnih dejavnikov, tako zunanjih kot notranjih; tistih, ki odbijajo, in tistih, ki privlačijo. Motivacijski dejavniki se od človeka do človeka močno razlikujejo, kljub temu pa se vsi med njimi po selitvi znajdejo v novem, tujem okolju. So izseljenci svoje matične države in priseljenci tuje države. Zanimali so me kontekst njihove odločitve za selitev, doživljanje procesa selitve in trenutno počutje v tujini. Pri zbiranju podatkov sta me vodili raziskovalni vprašanja: kakšni so razlogi sodobnega slovenskega izseljenca za odhod iz Slovenije in kakšna je njihova izkušnja bivanja in dela v Avstriji in Nemčiji?

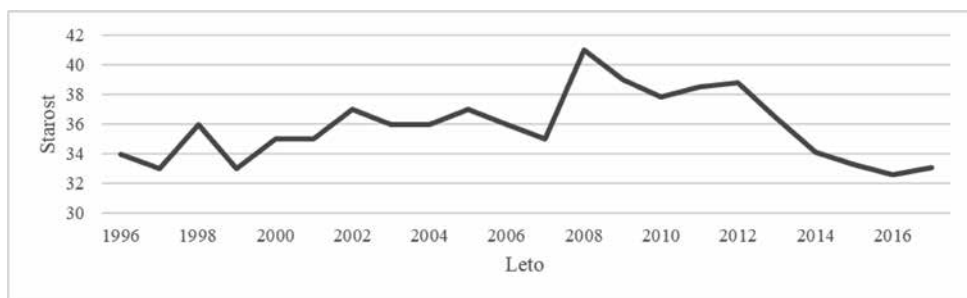
### Opredelitev sodobnega izseljevanja

Slovenski prostor je bil kot izrazitejše evropsko izseljensko območje vpet v bogato dinamiko izseljevanja, ki je potekalo v različnih valovih in smereh, kar so narekovali prostorsko-zgodovinski dejavniki (npr. slovenska politična emigracija v Argentino po drugi svetovni vojni). Od slovenske osamosvojitve leta 1991 govorimo o t. i. sodobnih

izseljencih,<sup>1</sup> ki v tujino odhajajo zaradi brezposelnosti in z namenom iskanja kariernih priložnosti, želje po višjem socialnoekonomskem standardu in iz drugih razlogov (Žitnik Serafin idr. 2018: 7). Statistike kažejo, da je med njimi vse več mladih izobražencev, ki vidijo v tujini priložnosti za osebni in karierni razvoj.

Povprečni sodobni slovenski izseljenec odide v tujino v življenjskem obdobju zgodnje odraslosti (med 30 in 45 leti),<sup>2</sup> za katero so značilni številni pomembni dogodki, kot so razvoj intimnega razmerja, zapuščanje matične družine, poroka, nosečnost, rojstvo otrok, razvoj kariere ipd. (Marjanovič Umek, Zupančič 2004). Iz Grafa 1 je razvidno, da se povprečna<sup>3</sup> starost sodobnega slovenskega izseljenca od leta 2008 vztrajno niža in se tako približuje razvojnemu obdobju prehoda v odraslost (med 18 in 29 leti). Tako kot obdobje zgodnje odraslosti ima tudi prehod v odraslost svoje posebnosti tako na osebem kot socialnem in poklicnem področju. Mladi posamezniki so v tem obdobju namreč biološko dozoreli, za seboj imajo več kot desetletje formalnega izobraževanja, njihova osebna identiteta je v veliki meri zgrajena, imajo dobro razvito socialno mrežo ter izkušnje s partnerstvom. Odločajo se, kje in s kom bodo živeli, katerim dejavnostim se bodo posvečali, v katero smer bo šla njihova kariera. V tem kontekstu lahko mladi selitev doživljajo kot naložbo v svojo prihodnost.

Graf 1: Povprečna starost državljanov RS, odseljenih v tujino



Vir: Statistični urad RS 2019

Družbenoekonomske spremembe so v zadnjem času vplivale na podaljševanje prehoda v odraslost še v trideseta leta. Večina mladih se na prehodu v odraslost namreč odloči za nadaljevanje študija in s tem zamakne vstop na trg dela. Tehnološko razvite družbe s poudarjanjem pomembnosti izobraževanja, strokovnega usposabljanja, osebne izbire in neodvisnosti mladim posameznikom nad 18 let omogočajo podaljšano obdobje neodvisnega preizkušanja različnih možnosti in oblikovanja identitete (Zupančič 2011). Po podatkih Eurostata je delež slovenskih mladih (med 20 in 24 leti)

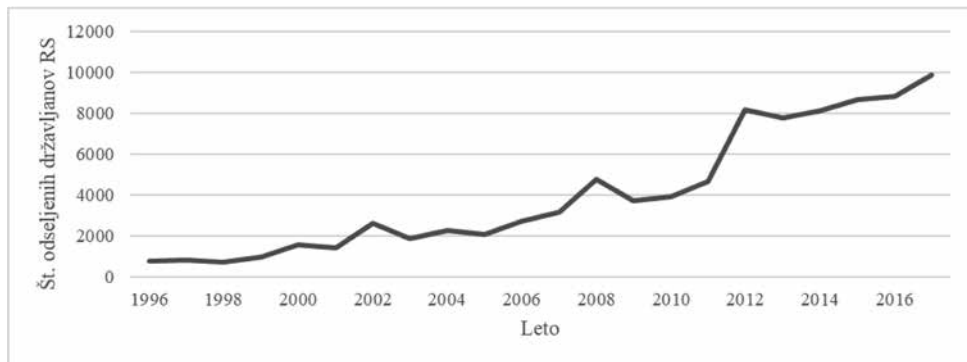
1 V prispevku uporabljeni moški slovnični spol se enakovredno nanaša na vse spole.

2 Ločevanje med razvojnima obdobjema prehoda v odraslost ter zgodnje odraslosti v strokovni literaturi ni enoznačno kronološko zamejeno, saj se razlikuje glede na sociokulturni kontekst posameznika (Zupančič 2011).

3 Uporabljena mera srednje vrednosti oz. povprečja v prispevku je aritmetična sredina.

v terciarnem izobraževanju najvišji med državami EU27, giblje se okoli 50 odstotkov (Puklek Levpušček, Zupančič 2011). Večina mladih odide iz Slovenije po zaključku terciarne izobrazbe, torej na vrhu svojih kariernih zmožnosti. Graf 2 prikazuje naraščanje slovenskega izseljevanja; v zadnjih štirih letih je najštevilčnejša skupina izseljenih stara med 25 in 29 leti, druga najštevilčnejša skupina med 30 in 34, tretja pa med 35 in 39 leti.

Graf 2: Državljeni RS, odseljeni v tujino



Vir: Statistični urad RS 2019

Trend zapuščanja države postopno narašča od konca devetdesetih let prejšnjega stoletja. Med letoma 1997 in 2007 se je iz Slovenije letno povprečno izselilo 1837 državljanov. Leta 2008 začeta gospodarska kriza je vplivala na višje število izseljenih. Skokovit porast izselitev je bil opazen tudi leta 2012, ko so se posledice ekonomske krize odrazile v državnih ukrepih in posledično v vsakdanjem življenju ljudi. Sprejeti ukrepi za omejevanje rasti javne porabe so bili najbolj opazni v znižanju plač, kar je lahko prispevalo k splošni negotovosti glede življenjskega standarda v prihodnosti (Zorc 2013: 126) in upadu zaupanja prebivalcev RS v lastno vlado. Negativni trend v izražanju zaupanja Slovencev v institucije sistema je bil namreč opazen že pred ekonomsko krizo (Rus, Toš 2005: 345).

Na ekonomske vzroke izselitev lahko sklepamo tudi po sočasni usklajenosti številčnega porasta izselitev in najvišji povprečni starosti izseljenih v letih 2008 in 2012 (Graf 1). Leto 2017 je mejnik v zgodovini slovenskega izseljevanja – v tujino je odšlo več državljanov RS kot leta 1991,<sup>4</sup> ko je v Sloveniji potekala osamosvojitvena vojna. Podatki na skupni ravni izselitev vseh prebivalcev Slovenije (ne glede na državljanstvo) kažejo nekoliko drugačno sliko. Leta 2017 je iz države skupno odšlo 17.555 prebivalcev Slovenije, več izselitev je bilo na skupni ravni zabeleženih le leta 2009, ko jih je odšlo rekordno število 18.788.

4 Do leta 1992 so v podatkih o meddržavnih selitvah skupno upoštevani vsi državljani republik nekdanje Jugoslavije, ki so v Sloveniji prijavili ali odjavili stalno prebivališče (SURS 2019).

## Beg ali kroženje možganov?

Kot del političnega in medijskega diskurza v ospredje ponovno prihajajo opozorila pred nevarnostmi 'bega možganov' (angl. *brain drain*) (glej Mulec, Gostečnik 2011). Ta se nanaša predvsem na migracije, ki jih povzročajo ekonomski dejavniki, največkrat povezani s trgov delu in z zaposlitvenimi možnostmi: višja plača, (boljše) karijerne priložnosti, možnosti napredovanja, ugodnejše delovne razmere, širše gledano pa je dejavnik za ekonomsko migracijo lahko tudi želja po boljšem socialnoekonomskem standardu (kamor lahko uvrstimo tudi selitve študentov, ki se iz želje po boljših kariernih priložnostih v prihodnosti odločajo za študij v tujini). Z omenjeno problematiko se ukvarja uradni dokument Strategija ekonomskih migracij za obdobje od 2010 do 2020, ki navaja možne smernice za zmanjševanje tveganja »bega možganov« in spodbujanje vračanja slovenskih izseljencev iz tujine (Ministrstvo za delo, družino, socialne zadeve in enake možnosti 2010). V dokumentu je pojav »bega možganov« opredeljen kot »množično odhajanje skupine migrantov, ki imajo običajno srednjo do visoko raven usposobljenosti« (prav tam: 38), kar lahko v matičnih državah negativno učinkuje na ključna razvojna področja (npr. izobraževanje in zdravstveno varstvo). Podatki o izobrazbeni strukturi izseljenih državljanov RS med letoma 2014 in 2017 kažejo, da prevladuje končana srednješolska izobrazba. Natančneje, po podatkih SURS-a (2019) za državljanke RS, stare med 25 in 39 leti, sicer prevladuje srednješolska izobrazba, vendar se ji delež višješolske oz. visokošolske izobrazbe naraščajoče približuje; leta 2017 je število višje oz. visoko izobraženih izseljenih državljanov RS med 25 in 29 leti prvič preseгло število tistih s srednješolsko izobrazbo.

Trenutno dogajanje v Sloveniji mediji prikazujejo z opozorili o posledicah odhajanja mladih izobražencev in njihovem vplivu na slovensko gospodarstvo. Milena Bevc (2013: 38) je analizirala izseljevanje slovenskih znanstvenikov v obdobju med letoma 1995 in 2009. Ugotovila je naraščajoč trend izseljevanja strokovnjakov z vseh širših znanstvenih področij, pri čemer so največji delež konsistentno predstavljale osebe z naravoslovno izobrazbo. Razmisleki o emigraciji visoko izobraženih kadrov se pod okriljem globalizacije postopoma preobražajo v idejo »kroženja možganov«, ki počasi nadomešča pojma »beg možganov« in »pridobivanja možganov« (Tung 2008). Predstavlja krožni proces, v katerem kraj bivanja postaja manj stabilen in relativno trajen (Ograjenšek idr. 2011: 4). Med dejavniki preoblikovanja koncepta »bega možganov« je gotovo tudi ekonomska kriza leta 2008, ki je spremenila demografsko sliko izseljenstva. Do omenjene prelomnice smo pod tem imenom označevali odseljevanje visoko izobraženih posameznikov zaradi njihovih visokih profesionalnih ambicij, po krizi pa so se jim pridružili še različni kadri, ki v Sloveniji ne najdejo zaposlitve (Valentinčič 2017: 173).

O pomenu kroženja znanja samoiniciativno govorijo člani društva Vtis (V tujini izobraženi Slovenci), ki živijo po vsem svetu in si želijo bolj tesnega povezovanja s Slovenijo. Na podlagi osebnih izkušenj poudarjajo nekatere prepreke, ki jih ovirajo pri stikih s Slovenijo, in navajajo konstruktivne predloge za njihovo preseganje (Vtis

2016). Težave, ki so predvsem birokratske narave, so identificirali na institucionalni ravni. Nanašajo se na različna področja: štipendiranje, birokratske postopke pri prehodu študentov med državami, razpise za spodbujanje zaposlovanja mladih doktorjev znanosti, razpise za prosta mesta na slovenskih visokošolskih ustanovah, davčne obremenitve raziskovalcev, ki začasno delajo v tujini ipd.

Ponovno je treba opredeliti pojma »beg možganov« in »ekonomski migrant«, ki sta relativna in odvisna od časovno-prostorskega konteksta. Razumevanje pojmov se namreč v času spreminja hkrati s preobražanjem pomena izobrazbe. Danes se pojem »izobraženega človeka« vse bolj povezuje z znanstvenim magisterijem in doktoratom znanosti (Lukšič Hacin 2004: 3). Kritično je treba brati tudi uradne statistične podatke, ki so sicer »objektivni« pokazatelj trenutnega demografskega in ekonomskega stanja države, vendar pri tem umanjka subjektivni del, ki lahko skriva vzroke za trenutno stanje in možne rešitve. Nihče se ne pogloblja v dejansko izkušnjo omenjene skupine izseljencev in njihovo celostno doživetje življenja v tujini. Primer za lažjo ponazoritev pomembnosti raziskovanja subjektivnih izkušenj je lahko višina mesečne plače – ki je višja od slovenske – sodobnega slovenskega izseljenca v Avstriji ali Nemčiji (OECD 2019). Na podlagi statističnega podatka bi lahko sklepali o visokem socialnoekonomskem standardu, ki posamezniku omogoča kvalitetno življenje. Šele po seznanitvi s subjektivno izkušnjo morda ugotovimo, da smo sklepali prehitro. Celotna situacija izgubi pozitivni prizvok, če oseba sicer poroča o zadovoljstvu z višino plače, a hkrati naslavlja subjektivni občutek »ujetosti« v delovno okolje, kjer doživlja mobing.

## METODA

### Udeleženci

Ciljna populacija so bili mladi izseljenci z državljanstvom RS, stari med 20 in 40 let, ki so se v obdobju zadnjih štirih let (od 1. januarja 2014) preselili v Avstrijo ali Nemčijo. Pogoj za sodelovanje je bil, da so v času intervjuja v tujini bivali že vsaj tri mesece in da so nameravali v bližnji prihodnosti v tujini tudi ostati (še vsaj tri mesece). V kontekstu mobilnosti lahko o povečanih možnostih življenja v tujini govorimo že med izobraževanjem, saj to omogočajo programi študijskih izmenjav (npr. Erasmus+, CE-EPUS). Študijske izmenjave so v zadnjih letih postale običajen in širši družbeni pojav. Trajanje bivanja v tujini se razlikuje glede na namen izmenjave (študij, praktično usposabljanje), zaradi česar ima populacija mobilnih študentov svoje določene specifične in bi jo bilo treba samostojno preučevati. Iz tega razloga sem v vzorec vključila le tiste študente, ki so se preselili za daljši čas in so bili v Avstriji ali Nemčiji uradno vpisani v študijske programe.

V raziskavi je sodelovalo 18 udeležencev, od tega osem žensk in deset moških. Povprečna starost je bila 29 let. Skupina izseljenih v Avstrijo je zajemala 12 oseb, v



Nemčiji jih je živelo šest. V vzorcu udeleženci iz Avstrije predstavljajo dve tretjini vseh vprašanih. Od tega jih je šest živelo na Dunaju, dva na avstrijskem Koroškem, dva na obmejnem podeželju in dva v zahodni Avstriji. Udeleženci iz Nemčije so živeli v Münchnu, Bonnu, Augsburgu in drugih manjših mestih. Aritmetična sredina bivanja v tujini je bila 23 mesecev, torej so v času intervjuja v tujini povprečno bivali skoraj dve leti.

Po krajevnem izvoru so udeleženci prihajali iz osrednjeslovenske, savinjske, koroške, podravske, pomurske in gorenjske regije. Razpon ravni izobrazbe je segal od končane osnovne šole do doktorata znanosti. Skoraj polovica udeležencev je imela vsaj univerzitetno izobrazbo, ena tretjina status študenta, preostali pa končano osnovno, srednjo ali poklicno šolo. Vsi udeleženci razen dveh rednih študentk so bili v času intervjuja zaposleni, tudi nekateri s statusom študenta so bili v delovnih razmerjih z nizkim številom ur.

## Pripomočki

Podatke o sodobnem slovenskem izseljenstvu v Avstriji in Nemčiji sem zbirala s pomočjo kvalitativne metode polstrukturiranega intervjuja. V prvem sklopu sem spraševala o demografskih podatkih (starost, spol, izobrazba, kraj bivanja, dolžina bivanja v tujini, krajevni izvor in ali so zamenjali stalno prebivališče). V drugem sklopu o preteklosti sem jih spraševala o ozadju odločitve za odhod v tujino (npr. Kaj je vplivalo na vaš odhod v tujino?). V tretjem sklopu smo se pogovarjali o sedanosti in njihovih trenutnih izkušnjah bivanja v tujini (npr. Ali lahko izpostavite največje spremembe, ki ste jih morali vnesti v vaše življenje po selitvi? Kako bi na splošno opisali vašo izkušnjo bivanja v tujini? Kako ste našli prvo zaposlitev? Kako ste našli prvo nastanitev? S kom se družite sedaj? S katerimi aspekti življenja v tujini ste bolj zadovoljni in s katerimi manj?). Sledila sta podsklopa »odnos okolja do njih« (Na kakšen način doživljate odnos okolja do vas? Ali se počutite kot tujci? Kako sprejete se počutite?) in »odnos do domovine« (Kaj za vas pomeni dom? Ali opazate kakšne razlike v primerjavi z domovino? Na kakšen način ohranjate stik z domovino?). Zadnji sklop je bil posvečen načrtovanju prihodnosti (Ali se nameravate v prihodnosti vrniti v Slovenijo? Kakšni so vaši načrti za prihodnost?).

## Postopek

Ker podatkovna baza o sodobnih izseljencih ne obstaja, sem stik z njimi navezala preko slovenskih Facebook skupin: Slovenci v Avstriji, Slovenci v Nemčiji, Slovenci na Dunaju in Slovenci v Berlinu. Vabilo k sodelovanju sem objavila z navedbo glavnih informacij o raziskavi: z namenom, s kriteriji za sodelovanje in s svojim kontaktom. Prosil sem jih, naj vabilo k sodelovanju posredujejo drugim morebitnim interesentom

(vzorčenje po principu snežne kepe). Potencialni udeleženci, ki so ustrezali kriterijem, so me kontaktirali sami. V naslednjem koraku smo se domenili za način izvedbe intervjuja: v živo, preko Skypa ali pisno. Deset udeležencev se je odločilo za možnost intervjuja preko Skypa, s šestimi pa sem se na Dunaju in v Ljubljani srečala v živo. Intervjuje sem izvedla med decembrom 2017 in februarjem 2018. Pred začetkom sem jim pojasnila namen raziskave in pridobila podpisano soglasje o udeležbi v raziskavi. Intervju je trajal povprečno 43 minut. Dve osebi sta izbrali pisni način odgovarjanja na vprašanja. Posnete intervjuje sem večkrat poslušala in v programu Excel pod vsakim vprašanjem povzela odgovore. Podatki so v anonimni obliki shranjeni v varovani mapi na mojem osebem računalniku.

V skladu s fenomenološko analizo (Giorgi 1970) sem informacije o izseljenski izkušnji klasificirala v tematske sklope. V fenomenološkem pristopu je tematska analiza namreč bistveni del razvrščanja informacij v večje pomenske kategorije (Holloway, Todres 2003). Fenomenologijo lahko opredelimo kot teleološki pristop, ki ne zastavlja vprašanja »zakaj«, temveč »čemu«. Njen cilj je določiti, kaj izkušnja pomeni udeležencem, razumljiv opis izkušnje pa podati z njihovega stališča (Moustakas 1994). Osredotoča se torej na vprašanje, kako ljudje razumejo in razlagajo svet. Subjektivni pomeni, ki mu ga pripisujejo, so nerazdružljivi s simbolično konstruirano realnostjo (Tilley 1994). V ta namen sem informacije o izseljenski izkušnji zbirala neposredno od ljudi, ki so del fenomena selitve v tujo državo – natančneje v Avstrijo ali Nemčijo.

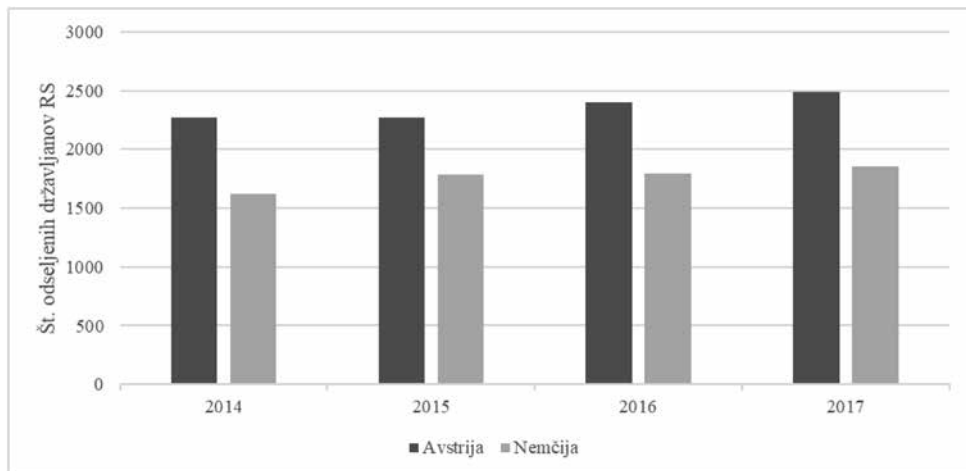
V prvem delu razprave navajam statistični pregled sodobnega izseljevanja, v nadaljevanju pa ga dopolnim z empiričnim delom študije. Za izdelavo grafičnih prikazov sem uporabila prosto dostopne surove podatke Statističnega urada RS (2019). V drugem delu razprave sem na podlagi odgovorov udeležencev oblikovala večje tematske sklope, ki zajemajo elemente izseljenske izkušnje s stališča sodobnih migrantov. Za večjo nazornost so med besedilom uporabljeni dobesedni navedki iz intervjujev. Pred končno objavo sem udeležencem poslala v branje tiste izjave iz njihovih intervjujev, ki sem jih želela uporabiti med besedilom. Nekatere šifre smo spremenili in dopolnili določene citate, da ne bi prihajalo do dvoumnih interpretacij. Vsak udeleženec je podal svoje soglasje za njihovo uporabo in je v besedilu predstavljen s svojo šifro, npr. JN.

## REZULTATI IN RAZPRAVA

Sodobne mednarodne selitve so povezane s procesi globalizacije, ki so v zadnjih dvajsetih letih vplivale na socialne, politične in ekonomske spremembe v EU. Pri tem ima pomembno notranjo vlogo tudi odprtost EU, ki omogoča prost pretok ljudi, kapitala, blaga in storitev. Migracija prebivalstva je najjasnejši in najtočnejši kazalec socialnoekonomskega blagostanja, politične trdnosti in sociokulturne privlačnosti regije, pokrajine ali države (Gurieva idr. 2015: 64).

Po podatkih SURS-a se od leta 2014 državljani RS konsistentno najštevilčnejše selijo v Avstrijo in Nemčijo, ki je četrto največje gospodarstvo na svetu. Leta 2013 je prednjačila Nemčija, kamor se je izselilo 1662 državljanov RS, nato pa jo je prehitela Avstrija. Tretja najbolj priljubljena destinacija je Švica, vendar so številke selivcev v primerjavi z Avstrijo in Nemčijo vsaj enkrat nižje. Kot je razvidno iz Grafa 3, izseljevanje iz leta v leto linearno narašča.

Graf 3: Državljanji RS, v Avstrijo in Nemčijo odseljeni med letoma 2014 in 2017



Vir: Statistični urad RS 2019

Odseljeni v Avstrijo in Nemčijo predstavljajo približno polovico vseh v tujino odseljenih državljanov RS. Odstotki izseljenih v omenjeni dve državi med letoma 2014 in 2017 so razvidni iz Tabele 1. V zadnjem letu je delež odseljenih v Avstrijo in Nemčijo v razmerju do vseh izselitev manjši kot prejšnja leta (44 odstotkov). To kaže na večjo razpršitev izseljevanja v druge države.

Tabela 1: Delež odseljenih državljanov RS v Avstrijo in Nemčijo

Leto	Odseljeni v tujino (skupaj)	Odseljeni v Avstrijo in Nemčijo	Delež (%)
2014	8129	3895	48
2015	8654	4063	47
2016	8818	4199	58
2017	9871	4352	44

Vir: Statistični urad RS 2019

Statistični podatki so le približek resničnega stanja mednarodnega selitvenega gibanja. Podatki za posamezna obdobja niso povsem primerljivi, saj so družbenopolitične spremembe vplivale tudi na oblikovanje kategorij, metod in tehnik popisov. Sedanja statistična metodologija vsako selitev državljana Republike Slovenije beleži za meddržavno selitev glede na prijavo ali odjavo prebivališča. Po podatkih Statističnega urada RS (2019) so v statistični evidenci pod kategorijo »odseljeni« zajeti tisti posamezniki, ki so ali a) odjavili stalno prebivališče v Sloveniji (in nimajo hkrati veljavnega začasnega prebivališča v Sloveniji), b) ob veljavnem stalnem ali začasnem prebivališču v Sloveniji prijavi začasno prebivališče v tujini za vsaj eno leto, ali c) odjavili začasno prebivališče v Sloveniji ali jim je njegova veljavnost potekla (in nimajo hkrati stalnega prebivališča v Sloveniji). Uradni podatki torej ne zajamejo tistih, ki med selitvijo v drugo evropsko državo ne odjavijo stalnega prebivališča v RS. Po podatkih Ministrstva za javno upravo (2019) bi sicer moral vsak, ki namerava začasno oditi z območja Slovenije za več kot tri mesece, svoj začasni naslov v tujini prijaviti katerikoli upravni enoti ali krajevni uradu na območju Slovenije.

Dvanajst udeležencev pričujoče raziskave je v Sloveniji odjavilo stalno prebivališče, kot razlog so navedli preprečevanje dvojne obdavčitve. To pomeni, da preostalih šest sodelujočih v raziskavi ni evidentiranih v navedenih statističnih podatkih. Kot razlog za ohranitev stalnega prebivališča v Sloveniji so navajali negotovost glede vrnitve v Slovenijo, določen čas pripravištva v tujini ali status študenta, po katerem so zavarovani in jih varuje pred dvojnimi obdavčitvami. Uradne statistike prav tako ne zajemajo tistih, ki sicer živijo v Sloveniji, vendar dnevno migrirajo na delo v sosednjo državo, npr. Avstrijo. Selitve znotraj Evropske unije je težko spremljati tudi zaradi notranje odprtosti meja in z evropskim državljanstvom pridobljenih pravic. S tem se je v Evropski uniji zmanjšala potreba po pridobivanju drugih državljanstev, prav tako državljanji večine članic EU za delo znotraj EU ne potrebujejo več delovnega dovoljenja. Večina držav članic EU dopušča dvojno državljanstvo, nekatere pa navajajo različne omejitve in v določenih primerih zahtevajo odpust iz dosedanjega državljanstva (Avstrija, Nizozemska idr.). Med njimi je tudi Slovenija, ki dvojno državljanstvo dopušča le v določenih primerih, npr. pri postopku izredne naturalizacije (Ministrstvo za notranje zadeve 2019).

## Razlogi za selitev

Želja po višjem socialnoekonomskem standardu, ki so jo udeleženci navajali kot glavni razlog selitve, se odraža na različne načine. Nekateri so priložnosti za študij in življenje v tujini navajali kot izziv, možnost za osebno rast, učenje tujega jezika in referenco za prihodnost. Drugi so bili v navajanju svojih ciljev bolj specifični, navajali so nezadovoljstvo s trenutnim gospodarskim in socialnim stanjem v Sloveniji. V tujino jih je vodila želja po višjem zaslužku, boljših delovnih razmerah,

bolj spoštljivem odnosu nadrejenih in večji socialni varnosti, ki se kaže tudi v višini pričakovane pokojnine.

Nekateri so pri zaposlovanju v Sloveniji navajali primere diskriminacije, ki kažejo na nedopustno ravnanje zaposlovalcev in sistema do ranljivih skupin: »Partner je diabetik in dolgo ni dobil dela v Sloveniji, ker so se prav povsod bali zaposliti diabetika. Potem je začel delat v Avstriji. [...] Jaz sem dobila zaposlitev takoj, v roku enega meseca identično službo svoji prejšnji« (MF). Prav nezadovoljstvo z odnosom družbe do njih je bilo za nekatere udeležence glavni motiv za odhod v tujino: »Za opravljeno delo se v Avstriji ne rabim kregat – ali mi bodo priznali nadure ali ne« (TO).

Najbolj me je motil odnos Slovenije do mene, ker sem po statusu invalid, in to da bi jaz dobil službo v Sloveniji, je znanstvena fantastika. Ko sem že dobil koga, ki bi me zaposlil, sem prišel do zdravnika, ki mi je rekel v obraz, da mu moram za zdravniško spričevalo plačati 400 €. Sploh ni ovinkaril, direkt mi je povedal: »Podmaži me, pa ti ga dam. Drugače ga ne dobiš, ker si ravno prav polomljen.« [...] Na črno ni problema dobit službe, uradno ni šans. (MN)

Ugodne razmere za delo v Avstriji in Nemčiji podpirajo tudi ekonomski in statistični kazalci. Po podatkih Eures Portala (2019) je Nemčija najbolj iskana destinacija iskalcev zaposlitve, Avstrija je na šestem mestu. Zakaj je od leta 2014 prav Avstrija najpogostejša država slovenskega izseljevanja? Več kot polovica udeležencev je kot pomemben dejavnik odločitve navedla neposredno bližino Slovenije, kar jim omogoča redno obiskovanje družine in prijateljev. Poleg tega je ob kakršnikoli krizni situaciji mogoče v eno ali drugo državo priti v relativno kratkem času; udeležencem to predstavlja subjektivni občutek varnosti: »Če bi bila sila, sem lahko zelo hitro doma, kar je pomirjujoče. Jaz sem lahko v petih urah doma; če si v Glasgowu, ne moreš – rabiš dva dni, da si splaniraš pot domov« (JN).

## Razlike med Slovenijo in državo izselitve

Po selitvi se je treba spoprijeti z različnimi spremembami, kar od osebe zahteva veliko mero prilagodljivosti, iznajdljivosti in čustvene stabilnosti. Udeleženci poročajo, da se je treba prilagoditi tujemu jeziku, kulturi in birokraciji, pri čemer prevladuje skrb za osnovne potrebe. Nekateri so se spomnili na začetne občutke osamljenosti in potrebi po pomoči drugih oseb: »... naenkrat brez prijateljev okoli sebe, sama v mestu ...« (MA); »... na nikogar se ne moreš obrnit, ko ti sredi ceste crkne avto« (MO). Ne glede na to, ali so udeleženci bivali v Avstriji ali Nemčiji, so navajali podobne informacije. Kultura je sicer podobna, vendar je sistem drugačen: »Papirji so v Nemčiji pomembnejši od denarja« (JA). Zelo pomembni so urnik, točnost, disciplina, organiziranost, natančnost in upoštevanje družbenih pravil: »V najemni pogodbi piše, da ne smeš hodit po travi na notranjem dvorišču« (JN), kar velja tudi za prostočasne

socialne stike: »Ko nekaj rečejo, je kot da bi v Sloveniji podpisal pogodbo. [...] Če se zmeniš za kavo čez tri tedne, to velja. Ni kot pri nas, ko moraš vedno preveriti dan prej« (MN). Razlike so opazne tudi v socialnem bontonu, npr. kdo povabi na pijačo in kdo plača: »V Avstriji je več individualizma, vsak plača svoj račun, osebni in finančni vidik sta popolnoma ločena« (JU). Navajali so tudi jasno ločnico med mestom zaposlitve in zasebnim življenjem: »V službi se super razumemo, v bloku ne poznam nikogar. Ni tako kot v Sloveniji, ko sosedi pozvoniš in jo vprašaš, če ima mleko« (JU).

Udeleženci iz Nemčije so poudarili težave z bivanjem oziroma najemom stanovanj. V vseh večjih mestih je težko najti najemno stanovanje, prav tako so zelo visoke tudi najemnine. Zaradi hude konkurence se težave začnejo že pri iskanju in dogovarjanju za ogled ponujenih stanovanj: »Imaš oglas na spletu eno uro, dobiš 50 mailov, od tega jih 30 povabiš na ogled, pride jih 20. Torej tudi če si povabljen na ogled, imaš 5 odstotkov možnosti, da ga dobiš. Res potrebuješ veliko sreče ali pa poznanstva« (JN); »Najemodajalci preverijo tvoje ozadje in ti dodelijo bonitetno oceno. Pri tem upoštevajo več kriterijev: ali redno plačuješ telefon, ali imaš odprt bančni račun, vsoto denarja na bančnem računu, ali imaš kakšne dolgove, kazni, poleg tega lahko zahtevajo odrezke zadnjih treh plač« (JN). V praksi to pomeni, da morajo iskalci stanovanja lastniku dokazati, da so zaposleni in včasih povedati tudi višino zaslužka: »Če nikoli nisi živel v Nemčiji, imaš bonitetno oceno nič, saj ne morejo preveriti tvojega ozadja. [...] To so razlogi, ki govorijo proti temu, da vzameš tujca« (JN). Pogoji za iskanje stanovanja je torej redna zaposlitev, pri čemer najemodajalci dajejo prednost pogodbam za nedoločen čas. Lastniki stanovanj praviloma vnaprej zahtevajo varščino v višini treh mesečnih najemnin, hkrati pa je že treba plačati najemnino za prvi mesec. Tudi v primeru, ko jim najemodajalec obljubi stanovanje in posreduje številko transakcijskega računa, je treba biti pazljiv. Številne prevare z nakazili preko Western Union banke lahko vodijo do osebnega bankrota. Na problematiko digitalnih prevar opozarjajo že banke same. Iz tega lahko sklepamo, da je stanovanje najlažje najeti s pomočjo poznanstev in solidarnosti med ljudmi.

V primerjavi s Slovenijo je udeležence pozitivno presenetil odnos avstrijskih in nemških delodajalcev do svojih zaposlenih. Poudarjajo, da delodajalci v Avstriji in Nemčiji prepoznavajo pomembnost razvoja kadrov in zadovoljstva zaposlenih, kar se odraža v različnih spodbudnih mehanizmi: možnost napredovanja po šestih mesecih, postopni dvig višine plače, sprotno motiviranje zaposlenih, vlaganje v njihovo dodatno izobraževanje, ustvarjanje spoštljivega prostora, kjer imajo delavci možnost izražanja svojih mnenj nadrejenim. Če delavec izkaže voljo in motivacijo, lahko hitro napreduje in si zviša plačo. Razvoj kadrov ponekod poteka tudi na sistemski, ne le na ravni posameznika: »Notranja politika podjetja je taka, da se vsake tri leta zamenjajo delovne pozicije. Človek je lahko največ pet let na eni delovni poziciji. To se sicer ne dogaja zelo pogosto, načeloma pa stremijo k temu« (MR). Udeleženka z Dunaja je poročala o tem, da se zaposleni enkrat letno z vodjo odkrito pogovorijo o plači, problemih ali konfliktih. Na teh pogovorih lahko varno izrazijo svoje mnenje, odkritost je pozitivno sprejeta tudi na začetnih razgovorih za zaposlitev:

Super je to, da je pri oglasih za delo vedno napisana začetna plača, vedno je možnost napredovanja po šestih mesecih. V Sloveniji pa se vsi izogibamo temu vprašanju. Tu je jasno, da gre za zamenjavo mojega časa in znanja za neko plačilo. Pomembne so jim izkušnje in ne izobrazba na papirju, prisotno je zanimanje zame kot osebo, kjer pa držijo mejo profesionalnosti. (SA)

Po avstrijski zakonodaji mora biti v vsakem oglasu za delovno mesto navedena tudi višina plače. Podobna praksa velja tudi na nemškem trgu dela. Informacija o višini plače iskalcem zaposlitve pomaga pri odločanju o morebitni prijavi na prosto delovno mesto. Predvsem je ključna v primerih, ko zaposlitev zahteva selitev v tujo državo, ki zahteva dodatne finančne izdatke. Prav tako informacija o višini plače delodajalcem skrajša čas iskanja primerne kandidata. Na razpis se namreč prijavijo le kandidati, zadovoljni s ponujenim plačilom. V Sloveniji delodajalcem v oglasu ni treba navajati podatka o višini plače.

Poleg spodbudnega delovnega okolja so boljši tudi objektivni pogoji dela, npr. višina plače, dodatki, izplačilo 13. in 14. plače, letni dopust: »Zaposlena sva v istem podjetju, ki nama nudi skoraj 50 dni plačanega dopusta« (ŽA). V Nemčiji imajo vsi možnosti dodatnega zaslužka, kdorkoli lahko opravlja t. i. malo delo:<sup>5</sup>

V Sloveniji moraš biti študent, da lahko opravljaš študentsko delo. Tu lahko vedno opravljaš »mini job«, kar pomeni do 450 € zaslužka na mesec. To nanese približno 50 ur na mesec oz. delaš dvakrat na teden po šest ur. Delam v lokalni in je super, ker na mesec pride ob zaslužku še od 200 do 300 € napitnin (10 odstotkov je standard napitnin v Nemčiji). Se bolj spleča, kot če delaš v trgovini v skladišču. (MO)

## Odnos socialnega okolja do priseljencev

Na vprašanja o odnosu okolja do njih in subjektivnem občutku sprejetosti so udeleženci podali različne odgovore. Večina je poročala, da so ljudje površinski, nepristno prijazni in vljudni. »Za njih si *Ausländer*,<sup>6</sup> 'tujec'. Ljudje so prijazni, ampak čutiš zid; je hladno, ni pristno, počutiš se kot v živalskem vrtu« (AN). Številni so navajali ločnico med službenim in zasebnim življenjskim okoljem: »V službi se počutim popolnoma sprejeto, v vasi pa ne« (MF).

Odnos do tujcev opisujejo kot pritajeno ksenofoben, krivdo za napake se pogosto pripisuje priseljencem iz nekdanjih jugoslovanskih republik, za katere uporabljajo izraz s slabšalnimi prizvokom *Scheiss-Jugo*. Udeleženka, ki se je v Avstrijo preselila z družino, opaža načine, kako se avstrijska družba izogiba priseljencem: »Avstrijske mamice se umaknejo od slovenskih. Hči je povabljen na rojstne dneve

5 Angl. *marginal employment*.

6 Beseda ima v nemščini slabšalni pomen. Slovenski prevod je 'tujec, inozemec'.

drugih tujcev, k avstrijskim družinam ni povabljena« (MF). Primer nakazuje prenašanje elementov diskriminacije oz. razlikovanja na podlagi etnične pripadnosti preko staršev na otroke že v zgodnjem obdobju odraščanja. Spet drugi udeleženec je doživel posmehovanje Avstrijcev in vzpostavljanje distance z ignoriranjem želje po pogovoru. Predsodki imajo več pojavnih oblik, katerih izražanje se hitro stopnjuje: od družbeno sprejemljivih šal in izogibanja do diskriminacije, ki že ustvarja globoke družbene razlike, prikrajšanim skupinam pa onemogoča dostop do (ne)materialnih dobrin (Allport 1954). Udeleženec z Dunaja meni, da se negativen odnos do tujcev izraža predvsem v načinu, kako o njih poročajo avstrijski mediji; prikazujejo jih kot krivce:

Tujci so krivi za brezposelnost; za vse, kar gre narobe. Če Avstrijec posili žensko, je to mala novica na tretji strani, če pa je tujec, je takoj na naslovnici. Pristransko se poroča o nasilnih dejanjih, kjer se vedno vključi nacionalnost, kar lahko vpliva na diskriminacijo. Umetno se napihuje probleme. Ljudem, ki niso Avstrijci, se pripisuje krivda, čeprav Avstrija živi od priseljencev. (JU)

Razlikovanje je po mnenju nekaterih povezano tudi s fizičnim videzom in z znanjem jezika: »Na podlagi videza smo ljudje drugače sprejeti« (MO); »Dokler govoriš nemško, je vse v redu, tudi po izgledu ne izstopam« (SA). Po mnenju udeležencev je odziv ljudi odvisen od migrantove želje po integraciji v socialno okolje. Želja po vključitvi v družbo se namreč kaže z učenjem jezika, kar je razvidno iz naslednjih dveh primerov: »Na fakulteti spodbujajo, da se trudimo govoriti jezik. So razumevajoči, dobim veliko potrditev glede truda« (MA); »Vsaka država ima svojega »južnjaka« in v določenih pogledih sem to tu jaz. Ampak ko vidijo, da se trudim govoriti nemško, se odnos spremeni« (TO). Podobno razmišlja tretjina udeležencev, ki je imela v državi izselitve z ljudmi v glavnem pozitivne izkušnje.

Znanje jezika je med temeljnimi načeli politike vključevanja priseljencev v EU, integracija pa je definirana kot dinamičen, dvosmeren proces medsebojnega prilagajanja (Zavratnik Zimic 2011). Za vključevanje na trg dela sta za priseljence namreč ključna znanje jezika ter poznavanje zgodovine družbe, ki omogočata medkulturni dialog ter aktivno politično participacijo na vseh ravneh. Nekateri so prepričani, da se predstavljena ideja v praksi ne izvaja:

Avstrijci so zelo zaprt narod, želijo narediti mejo »ti si tujec«, ne glede na znanje jezika. Na uradu se skoraj obvezno zaplete, dokumenti pri vlogah se izgubljajo, tudi 4-krat sem morala oddati. Potem sem začela oddajati preko interneta, da imam vsaj dokaz. Nekateri so nesramni, razočaran prideš domov. (MF)



## Subjektivni pomen izselitve

Udeleženci so navajali pozitivne učinke izselitve, nekateri so jo opisovali kot najboljšo življenjsko odločitev. Kot posledico učenja samostojnosti in spodbujanja odprtosti so zlasti poudarjali osebnostno rast: »Odprejo se ti neki drugi pogledi, ki jih prej nisi mogel videti« (MR). Nekateri med njimi so se zaradi selitve v tujino prvič ločili od primarne družine: »Ni več Hotela Mama, prisiljen si delat vse sam« (JN). Osamosvajanje na več življenjskih področjih (npr. finančnem, socialnem) je razvojna naloga obdobja prehoda v odraslost, v katerem je bila večina udeležencev. Čeprav so poročali o težavnem začetnem prilagoditvenem obdobju, so si po določenem času bivanja v tujini uspeli ustvariti nov dom in življenje:

Sem zelo ponosna na naju. Težko je to razložiti nekomu, ki ni dal tega skozi, vendar ko se zvečer usedem na kavč in se zavem, da sem živa in zdrava, da imam fanta, ki mi stoji ob strani, mamo in ostalo družino, ki me bodo vedno imeli radi, da imam vse račune poravnane, uživam v študiju, sem zadovoljna z delodajalcem in delom, ki ga opravlja (in enako velja za fanta); takrat se zavem, kaj vse imam in kako zelo sem lahko srečna in hvaležna. (ŽA)

Polovica udeležencev poroča, da ima dva domova. »Dom« je zanje pomembna vez s preteklostjo, prostorom odraščanja in z družino: »Zame ima [dom] vedno dva pomena – tam, kjer sem jaz, in tam, kjer je moja družina – imam dva domova« (ŽI). Ena od udeleženk je opisala svoje postopno spreminjanje dojemanja koncepta doma: »Ko se preseliš v tujino, začneš idealizirat domovino ... Dom ni več pomemben, nisi vezan nanj, je osvobajajoče, nimam ga« (AN). Idealizirano podobo Slovenije so s stališča oddaljenosti opisovali tudi drugi: »Ugotovil sem, da je Slovenija res posebna dežela« (MR); »Takega druženja, kot je bilo v Sloveniji, tu ni. S temi novimi [Slovenci] nam je lažje, da držimo skupaj kot tujci v tuji državi, ne mislimo pa podobno, preveč stvari nas ločuje« (MF). Izseljenske skupnosti na različne načine ohranjajo etnično identiteto (glej Žitnik Serafin idr. 2018), npr. z aktivnostmi v društvih, jezikom, s hrano. Odgovori na vprašanje, kaj sodobnim izseljencem pomeni slovenska identiteta, so bili različni. Večini ne pomeni nič, nekaterim veliko (jezik, kultura, literatura, glasba, hrana). Za nekatere ima negativen prizvok: »Ljudje preveč povečujejo svojo nacionalno pripadnost. Identiteta se konstantno spreminja in pomeni nekaj drugega v različnih kontekstih, npr. Slovenci v Argentini živijo drugačno slovensko identiteto kot Slovenci v Sloveniji, ki ne hodijo na krožke o Sloveniji in jeziku« (SA).

## Vrnitev v Slovenijo

Večina udeležencev se pogosto vrača v Slovenijo, nekateri celo vsak konec tedna ali enkrat mesečno. Glavni namen stalnega vračanja je obiskovanje družine ali prijateljev.

Stik z njimi sicer na vsakodnevni ravni ohranjajo s pomočjo informacijsko-komunikacijske tehnologije in družbenih omrežij (Skype, Facebook, Messenger, WhatsApp, Viber ipd.).

Na vprašanje, ali se v prihodnosti želijo vrniti v Slovenijo, je večina udeležencev odgovorila negativno. Zanimalo me je, kaj bi se moralo spremeniti, da bi se vrnili. Navajali so različne pogoje: Slovenija bi morala dvigniti višino plač, urediti zdravstvene storitve in znižati prispevke. Slovenski znanstveniki, ki odhajajo na podoktorsko izobraževanje ali delo v tujino (so pa davčni zavezanci RS), imajo ob vrnitvi v Slovenijo težave tudi zaradi visokih davkov, višji življenjski stroški v tujem okolju se namreč ne upoštevajo. Namesto skrajnih odločitev, kot je odjava stalnega bivališča, društvo Vtis predlaga posnemanje dobrih zgledov iz nekaterih drugih držav, npr. nižje davčne obremenitve pri zaposlovanju in samozaposlovanju »povratnikov« (Delo 2017). Drugi menijo, da bi se morala v Sloveniji najprej spremeniti mentaliteta ljudi in da jim tujina »enostavno nudi preveč, da bi se vrnili« (ŽA). Po mnenju tretjine udeležencev smo Slovenci zelo zadržani, nevoščljivi in privoščljivi, kar je eden od udeležencev v šali povzel: »Samo da sosedu krava crkne, tudi če jaz nič nimam« (ŽI).

Manjše število vprašanih o prihodnosti razmišlja bolj odprto in vrnitve ne izključuje: »Res je, da so plače v tujini pogosto višje, delovno okolje pa izseljencem ponuja več priložnosti in izzivov. Po drugi strani pa nas način življenja in sproščenost pogosto vlečeta nazaj v Slovenijo« (PO). Zanje »obstaja možnost, vendar ne za vsako ceno«. Ena od udeleženk je navedla: »Vrnila bi se le v primeru, da bi dobila dobro službo, ki bi bila vredna vrnitve. Sicer za isto delo dobiš več denarja v Avstriji, vzemimo pisarniško delo kot primer. Začetna plača za prvo zaposlitev je od 1250 do 1300 € neto, delo v trgovini za polni delovni čas je čez 1000 €« (SA). Nekateri so izrazili željo, da bi se v Slovenijo vrnili šele po upokojitvi.

## SKLEP

Izkušnje ekonomskih migrantov, ki zrcalijo trenutno stanje, lahko pomagajo pri oblikovanju državne strategije za privabljanje mladih izobražencev. Nedvomno so tako razlogi za odhod iz Slovenije (brezposelnost, nizke plače, pomanjkanje kariernih priložnosti) kot nepripravljenost za vrnitev (poudarek na slabi socialni varnosti) pomembni pokazatelji, na katera področja vsakdanjega življenja bi morala država vplivati in jih izboljšati. Pri tem ji lahko pomagajo prepoznane šibke in močne plati življenja v Avstriji in Nemčiji, po katerih se – glede na socialnoekonomski standard – zgleduje tudi Slovenija.

Udeleženci raziskave so v Avstrijo in Nemčijo odšli iz ekonomskih razlogov, z željo po višjem življenjskem standardu in s pogledom v prihodnost. Še zlasti poudarjajo pozitiven odnos delodajalcev do svojih zaposlenih in pomembnost razvoja kadrov. Za uspešno integracijo v novo okolje se morajo slovenski izseljenci (tako kot tudi vsi drugi) naučiti jezik okolja, kjer stalno ali začasno živijo. V nasprotnem primeru se

lahko znajdejo v družbeni osami, izločeni iz političnega življenja ter brez možnosti odločanja in aktivne participacije. Uspešno integracijo omogoča jezikovni in kulturni pluralizem, ki nasprotuje asimilacijskim težnjam in odpira prostor za sobivanje različnih kultur. Prav večkulturnost, ki omogoča ohranjanje identitete in vrednot različnih skupin, bogati okolje in družbo. Na poti do zelenega cilja se migranti lahko znajdejo pred velikimi družbenimi in sistemskimi preprekami, ki se kažejo kot nestrpnost, predsodki, diskriminacija, hegemonija, socialna izključenost ipd.

Izkušnja izselitve pri ljudeh spodbuja željo po osebni rasti. Na delu v tujini si širijo obzorja, raziskujejo osebne meje in razvijajo socialno mrežo. Društvo Vtis v svojih poskusih izmenjave znanja in izkušenj s Slovenijo apelira, da bi morali odgovorni v Sloveniji proučiti predlagane rešitve trenutnega stanja množičnega izseljevanja mladih. Čim prej bi morali sprejeti ukrepe za krepitev kroženja znanja, s čimer bi povečali slovenski znanstveni potencial in pozitivno vplivali na državno gospodarstvo. Moralna odgovornost »vrnitve v domovino« torej ne leži le na plečih mladih slovenskih izobražencev, temveč v veliki meri tudi na državi. Naloga države je ustvarjanje in ohranjanje spodbudnega okolja, v katerega se bodo ljudje radi vračali. Samo v tem primeru lahko upamo na resnično kroženje znanja, ki bo »domov« prineslo nove izkušnje in potencial za vsestranski razvoj vključujoče družbe.

## VIRI IN LITERATURA

- Allport, Gordon (1954). *The Nature of Prejudice*. Reading, MA: Addison-Wesley.
- Bevc, Milena (2013). Emigracija slovenskih znanstvenikov v obdobju 1995–2009 po njihovem znanstvenem področju. *Dve domovini / Two Homelands* 37, 21–40.
- Eures portal (2019), <https://ec.europa.eu/eures/eures-apps/cvo/page/statistics?lang=en> (29. 1. 2019).
- Findlay, Allan M., Graham, Elspeth (1991). The Challenge Facing Population Geography. *Progress in Human Geography* 15/2, 149–162.
- Giorgi, Amedeo (1970). *Psychology as a Human Science: A Phenomenologically Based Approach*. New York: Harper & Row.
- Gurieva, Svetlana D. idr. (2015). Migration as an Indicator of People's Social and Psychological Stability (as Exemplified in the Pskov Region). *Psychology in Russia: State of the Art* 8/1, 61–73.
- Halfacree, Keith H., Boyle, Paul J. (1993). The Challenge Facing Migration Research: The Case for a Biographical Approach. *Process in Human Geography* 17/3, 333–348.
- Holloway, Immy, Todres, Les (2003). The Status of Method: Flexibility, Consistency and Coherence. *Qualitative Research* 3/3, 345–357.
- Jahedi, Salar, Mendez, Fabio (2014). On the Advantages and Disadvantages of Subjective Measures. *Journal of Economic Behavior & Organization* 98, 97–114.

- Lukšič Hacin, Marina (2004). Opredelitev pojma selitev in beg možganov. *Migracijska politika in beg možganov* (ur. Milena Bevc). Ljubljana: Inštitut za ekonomska raziskovanja, 3–4.
- Marjanovič Umek, Ljubica, Zupančič, Maja (2004). *Razvojna psihologija*. Ljubljana: Znanstveni inštitut Filozofske fakultete.
- Milharčič Hladnik, Mirjam (2017). Preučevanje slovenskega izseljenstva v perspektivi spolno obeleženih migracij. *Raziskovanje slovenskega izseljenstva: Vidiki, pristopi, vsebine* (ur. Janja Žitnik Serafin, Aleksej Kalc). Ljubljana: Založba ZRC, 67–82.
- Ministrstvo za delo, družino, socialne zadeve in enake možnosti (2010), [http://www.mddsz.gov.si/fileadmin/mddsz.gov.si/pageuploads/dokumenti\\_\\_pdf/Strategija\\_ekonomskih\\_migracij-2010-2020.pdf](http://www.mddsz.gov.si/fileadmin/mddsz.gov.si/pageuploads/dokumenti__pdf/Strategija_ekonomskih_migracij-2010-2020.pdf) (1. 4. 2019).
- Ministrstvo za javno upravo (2019), <https://e-uprava.gov.si/podrocja/osebni-dokumenti-potrdila-selitev/selitev-prijava-odjava-prebivalisca/zacasni-naslov-v-tujini1.html> (6. 2. 2019).
- Ministrstvo za notranje zadeve (2019), [http://www.mnz.gov.si/mnz\\_zasvas/tujci\\_v\\_sloveniji/drzavljanstvo/dvojno\\_drzavljanstvo/](http://www.mnz.gov.si/mnz_zasvas/tujci_v_sloveniji/drzavljanstvo/dvojno_drzavljanstvo/) (4. 2. 2019).
- Mlekuž, Jernej (2004). Življenjska pripoved migrantke Luise: Prispevek za »drugačno« družbeno geografijo. *Geografski vestnik* 76/1, 37–51.
- Moustakas, Clark (1994). *Phenomenological Research Methods*. Thousand Oaks, CA, US: Sage Publications, Inc.
- Mulec, Breda, Gostečnik, Nina (2011). Kroženje možganov. *Dve domovini / Two Homelands* 33, 109–122.
- OECD (2019), <https://data.oecd.org/earnwage/average-wages.htm> (1. 4. 2019).
- Ograjensek, Irena idr. (2011). *Podatkovne osnove za sistematično spremljanje bega možganov: Primer mladih raziskovalcev v Sloveniji*, [http://www.stat.si/StatistichniDnevi/Docs/Radenci2011/Ograjensek%20et%20al\\_Beg%20mozganov-prispevek.pdf](http://www.stat.si/StatistichniDnevi/Docs/Radenci2011/Ograjensek%20et%20al_Beg%20mozganov-prispevek.pdf) (28. 1. 2019).
- Puklek Levpušček, Melita, Zupančič, Maja (2011). *Študenti na prehodu v odraslost*. Ljubljana: Znanstvena založba Filozofske fakultete.
- Rus, Veljko, Toš, Niko (2005). *Vrednote Slovencev in Evropejcev: Analiza vrednotnih orientacij Slovencev ob koncu stoletja*. Ljubljana: Fakulteta za družbene vede.
- Statistični urad RS (2019), <https://pxweb.stat.si/pxweb/dialog/statfile2.asp> (6. 2. 2019).
- Tilley, Christopher (1994). *A Phenomenology of Landscape: Places, Paths and Monuments*. Oxford: Berg.
- Tung, Rosalie L. (2008). Brain Circulation, Diaspora, and International Competitiveness. *European Management Journal* 26/5, 298–304.
- Valentinčič, Dejan (2017). Sodobno izseljevanje iz Slovenije (2004–2017) in etnično povezovanje »novoizseljencev«. *Raziskovanje slovenskega izseljenstva: Vidiki, pristopi, vsebine* (ur. Janja Žitnik Serafin, Aleksej Kalc). Ljubljana: Založba ZRC, 171–192.

- Vtis (2016). *Izzivi v tujini izobraženih Slovencev*, <https://drive.google.com/file/d/0Bwl6MzxHFLbseFNhSGVnaGpqel9VWVBWdjd1QmNrS1Y3czFJ/view> (31. 1. 2019).
- Zavratnik Zimic, Simona (2011). Sodobne migracije v mnenjih slovenske javnosti. *Dve domovini / Two Homelands* 33, 55–71.
- Zorc, Mateja (2013). Gospodarska kriza v Sloveniji in ukrepi za izhod iz nje. *Z znanjem do idej za nov zagon gospodarstva: Zbornik 10. festivala raziskovanja ekonomije in managementa*. Koper: Fakulteta za management, 126.
- Zupančič, Maja (2011). Razvojno obdobje prehoda v odraslost – temeljne značilnosti. *Študenti na prehodu v odraslost* (ur. Melita Puklek Levpušček, Maja Zupančič). Ljubljana: Znanstvena založba Filozofske fakultete, 9–38.
- Žitnik Serafin idr. (2018). *Sodobne strategije slovenskih izseljencev za ohranjanje etnične identitete: Zaključno poročilo*. Ljubljana: ZRC SAZU, Inštitut za slovensko izseljenstvo in migracije.

## SUMMARY

### THE EXPERIENCE OF LIVING AND WORK OF CONTEMPORARY SLOVENIAN EMIGRANTS IN AUSTRIA AND GERMANY

Maja GOSTIČ

The author presents a contextual framework for economic migration, using objective statistical data as well as an empirical qualitative study. The research is dedicated to the most numerous group of contemporary Slovenian emigrants in the two most popular countries for emigration – young migrants between the age of twenty and forty years old in Austria and Germany.

The first question to ask is why they left, since motivational factors can be very different from person to person. Nevertheless, all of them found themselves in a new, foreign environment after moving. The author focused her research question on the experience of living abroad, since the statistical data show just one side of the broader picture. She conducted 18 interviews with Slovenian emigrants, offering an insight into their subjective experience of contemporary-day migration. The participants in the study were satisfied with their life abroad, especially with the aspect of their professional careers. The employers in Austria and Germany show great interest in the subjective wellbeing of their employees and offer them motivational opportunities to broaden their knowledge and enhance their professional skills.

Undoubtedly, the reasons for leaving Slovenia (unemployment, low wages, lack of career opportunities) and unwillingness to return (poor social security) are important indicators of the areas of everyday life that can be improved through state policy. Measures to strengthen the circulation of knowledge in order to increase Slovenia's scientific potential and positively influence the national economy should be taken as soon as possible. The moral responsibility of "returning to the homeland" therefore lies not only on the shoulders of young Slovenian academics, but also largely on the state. Its task is to create and maintain a stimulating environment to which people will want to return. Only in this case can we hope for a true circulation of knowledge, which will "bring home" new experiences and create the potential for the comprehensive development of an inclusive society.

# ZAVAJAJOČI PODATKI NA SEZNAMIH LADIJSKIH POTNIKOV KOT POSLEDICA RESTRIKTIVNE AMERIŠKE MIGRACIJSKE ZAKONODAJE

Lucia KULIHOVA<sup>1</sup>

COBISS 1.01

## IZVLEČEK

### Zavajajoči podatki na seznamih ladijskih potnikov kot posledica restriktivne ameriške migracijske zakonodaje

Avtorica se v članku ukvarja z ameriškimi potniškimi in migracijskimi zakoni iz let 1893, 1903 in 1907, katerih namen je bil upravljanje priseljevanja v ZDA. Prizadevanja za omejevanje priseljevanja predstavlja na podlagi kriterijev o koristnosti oziroma potencialni nevarnosti priseljencev. Pokaže, da podatki, navedeni na seznamih ladijskih potnikov, niso bili vedno verodostojni, želja tako izseljencev kot ladijskih družb po vstopu v ZDA je bila namreč močnejša od strahu pred zavrnitvijo.

KLJUČNE BESEDE: migracijski zakoni, ladijska družba, seznam ladijskih potnikov, go-ljufanje s podatki, ZDA

## ABSTRACT

### Misleading Data on Passenger Lists as a Consequence of Restrictive American Migration Legislation

The article focuses on American travel and migration legislation in the years 1893, 1903 and 1907, which were intended to manage immigration to the USA. Efforts to limit immigration were based on the criteria of the usefulness of or the potential threat posed by immigrants. The article shows that the data provided in the passenger lists were not credible in all cases, since the desire of both immigrants and steamship companies to enter the USA was much stronger than the fear of being refused.

KEY WORDS: migration legislation, steamship company, passenger list, data fraud, USA

---

<sup>1</sup> PhD kandidatka, Univerza na Primorskem, Titov trg 4, SI-6000 Koper; lucia.kulihova93@gmail.com

## UVOD

Teoretični del članka predstavlja razvoj ameriške migracijske zakonodaje od 19. stoletja do leta 1910 in obravnava tipologijo in vzrok restriktivnih elementov, ki so se v zakonih pojavili z namenom preprečiti potencialno ogroženost družbe. Izhaja iz seznamov ladijskih potnikov nemške ladijske družbe iz Bremna, Norddeutscher Lloyd, iz let 1901, 1905 in 1910, na katerih je opazen neposreden vpliv migracijskih zakonov iz let 1893, 1903 ter 1907, po natančni medsebojni primerjavi pa lahko ugotovljamo tudi razlike in posebnosti. Cilj analitičnega dela je izslediti in navesti zavajajoče ter nepravilne podatke s seznamov, ki so bili prikazani že glede na omenjene restriktivne elemente v zakonodaji. V članku se osredotočam na podatke oseb, ki so jih ob prihodu v ZDA zavrnilo, in na razloge, ki so botrovali njihovi vrnitvi v domovino. Najdene primere deportiranih potnikov primerjam s podatki iz zapisa Record of Aliens Held for Special Inquiry, ki je bil del dokumentacije o potnikih; tako laže ugotavljam, v katerih primerih je šlo za goljufijo. Izseljence, ki niso ustrezali ameriški priseljski zakonodaji, so morale ladijske družbe izločiti že pred vkrcanjem v Evropi. Pokažem, da na seznamih ladijskih potnikov navedeni podatki niso bili vedno verodostojni. Želja izseljencev in ladijskih družb, da jim omogočijo vstop v ZDA, je bila močnejša od strahu pred zavrnitvijo, zato so goljufali tako potniki kot ladijske družbe.

## SEZNAMI LADIJSKIH POTNIKOV KOT SREDSTVO ZA OMEJITEV NEZAŽELENIH MIGRANTOV: RESTRIKTIVNI MIGRACIJSKI ZAKONI

Seznami ladijskih potnikov so državni administraciji pomagali nadzorovati število v ZDA sprejetih migrantov (LeMay 2013: 21). Seznami, ki so postali bogat vir o izseljencih oz. priseljencih, so navajali imena potnikov, datum njihovega prihoda, družinske podatke, spol, starost, zakonski status in poklic ter narodnost in stalno prebivališče. Postopoma so jih, glede na migracijske zakone, npr. v letih 1893, 1903 in 1907, uporabljali tudi za selekcijo nezaželenih kandidatov. Prvi zakon, ki je urejal potniški promet, je bil Zakon o regulaciji pomorskega prevoza (Steerage Act) iz leta 1819 (Kalc 2018: 109). Ta je prvič uvedel 'sezname ladijskih potnikov', t. i. *passenger lists*. Vsaka ladja, ki je prispela na ameriško območje, jih je morala v obliki t. i. manifesta potnikov predložiti carinskemu predstojniku v pristanišču in jim s tem posredovati podatke o migracijah (Passenger Act 1819).

Kljub v ustavi zapisanim svobodoljubnim načelom so bile Združene države že od svojega nastanka pozorne na to, koga so sprejele v svojo družbo. Določeni organi so opazovali, kdo prihaja v državo in s kakšnim namenom ter kako bi nanjo lahko vplival. Kadar so nameravali povečati število delavcev, so zakone sprostil, sicer pa so vstop v državo omejevali. Na zakonodajo so vplivale tudi v ZDA vse bolj priljubljene evgenične, lahko bi rekli celo rasistične misli, ki naj bi zagotavljale »zdravo družbo«. Ana Cergol Paradiž piše, da evgeničnega prizadevanja ni toliko motiviral strah pred



propadanjem v gospodarskem smislu, temveč predvsem v biološkem (Paradiž 2016: 8). Menim, da sta ti dve značilnosti neločljivo povezani in bi po teoriji biološki propad postopoma prinesel tudi gospodarskega.

Strinjam se s tezo Mika Cola, da nadoblast »bele rase« ni bila mišljena v pomenu barve, temveč kulture (Cole 2015: 17). Treba pa je poudariti, da omenjene teorije ne predstavljajo splošnega mnenja in so imele v ameriški politiki veliko nasprotnikov. Na podlagi zbranih zakonov iz obdobja od konca 19. stoletja do leta 1910 in sovpadajočih seznamov ladijskih potnikov lahko sklepamo, da naj bi bil posameznik, ki je stopil na ameriška tla, izobražen, finančno samostojen, moralen, fizično in psihično popolnoma zdrav ter tako družbeno koristen. Izobrazba je le postopoma postala pomemben dejavnik migracijske zakonodaje. Bolj dobrodošli – pa še to ne vedno – so bili kvalificirani posamezniki, kot npr. obrtniki in učitelji (LeMay 1999: 31). Leta 1864 izdani Zakon o priseljevanju je spodbujal prihod migrantov, ki so jih ladijske družbe novačile z delovnimi pogodbami. Ti migranti so z obljubo, da bodo povrnili denar za prevoz, lahko legalno delali 12 mesecev. Ker je to časovno sovpadalo z ameriško državljansko vojno, je bil razlog najverjetneje povojna prenova družbe, ko naj izobrazba ne bi igrala najpomembnejše vloge. Leta 1868 je Contract Labor Law zagotavljal tudi plačilo prevoza, nepismenim pa je bil vstop v ZDA popolnoma prepovedan šele leta 1917 (Szucs, Hargreaves Luebking 1997: 366).

Ameriška zakonodaja je s pomočjo seznamov ladijskih potnikov nadzorovala tudi finančna sredstva, ki naj bi jih imeli na voljo potencialni migranti; izdana je bila namreč serija zakonov, ki so določali in postopoma dvigovali višino žepnine. Če izhajamo iz Williama Grahama Sumnerja, ki meni, da ima tisti z denarnimi sredstvi veliko prednost v borbi za preživetje pred tistimi, ki jih nima, zasledimo vpliv socialnega darwinizma (Zahra 2018: 51). Od leta 1893 je bilo priporočenih vsaj 30 dolarjev (An Act to Facilitate the Enforcement of the Immigration 1893: 569), leta 1903 pa že 50 (An Act to Regulate the Immigration 1903: 1216). Z naraščajočim številom migrantov so se kot pogoj za vstop v državo povečali tudi zneski. Zakon iz avgusta 1882 je določil priseljenjsko takso 50 centov (An Act to Regulate Immigration 1882: 214), ki naj bi postala baza za t. i. *immigration fund*, 'sklad za priseljevanje', s katerim bi ameriške oblasti poplačale z regulacijo migracij povezane stroške. Že leta 1891 je ameriški kongres predlagal povišanje omenjene takse na pet dolarjev, vendar predlog ni bil sprejet (Congressional Record, 23. 2. 1891: 9). Trud nasprotnikov neomejene imigracije so ovirali njeni zagovorniki, na sestanku kongresa 23. februarja 1891 je bilo povedano, »da je Amerika (ZDA) vedno zagovarjala teorijo, da so za vse uboge in zatirane njeni »svobodni bregovi« odprti, hkrati pa so nasprotniki razmišljali, kaj sploh so »novi imigranti« prinesli družbi« (Congressional Record, 22. 2. 1891: 8–10).

Leta 1903 je Zakon o priseljevanju za vse države, z izjemo Kanade, Mehike in Kube, vstopno takso povišal na dva dolarja (An Act to Regulate the Immigration of Aliens into the United States 1903: 1213). Zakon razlaga pomen takse, ki so jo ladijske družbe plačale v korist Združenih držav. Leta 1907 so takso z dva povišali na štiri dolarje (An Act to Regulate the Immigration of Aliens into the United States 1907: 898). Leta

1906 je začela v igro postopoma vstopati Dillinghamova komisija, ki je želela takso z dveh povišati na pet dolarjev in dejansko ustaviti množice prihajajočih migrantov (Lund 1994). Omenjena komisija, ki je nasprotovala neomejeni imigraciji v ZDA, je bila prepričana, da je bila stara migracija boljša od nove (Molina 2006: 62). Z migracijo se je celovito ukvarjala – izdala je 42 zvezkov, ki so obravnavali migrante v ameriški industriji ali njihove otroke v šolskem sistemu. Pomagala je tako pri končni izločitvi nepismenih oseb kot pri potrditvi vstopa nekaterih posameznikov v državo.

Frank Tibor navaja, da je bila Dillinghamova komisija znak naraščanja prisotnosti socialnega darvinizma in biološkega rasizma v ameriškem političnem mišljenju (Tibor 2009: 2). Takse so urejali zakoni o migraciji iz let 1882, 1903 in 1907, pri čemer so si najbrž prizadevali predvsem za finančni dobiček, ki so ga ponujale prihajajoče množice ljudi.

V 19. stoletju je bilo v ameriški družbi še zaznati vpliv puritanstva s poudarkom na morali. Iz tega razloga so bili pozorni na ženske brez spremstva, ki bi po njihovem mnenju lahko zašle v prostitucijo. Z zakonom The Paige Act iz leta 1875 so prepovedali vstop osebam, ki so podpirale prostitucijo (Logar 2017: 15). Page Laws iz leta 1875 je prekinil prihod Kitajk (Abrams 2005: 2) in na ta način to etnično skupino izločil kot po spolu opredeljeno skupino. Zakon v svojih dokumentih omenja tudi Dillinghamova komisija, in sicer kot prvi zakon, ki je izločil specifično skupino tujcev (immigration Commission; *Statistical Review of Immigration 1820–1910*: 366).

Neporočene ženske so priseljenski komisarji spraševali o podrobnostih njihovega spolnega življenja in jih v primeru spolnih izkušenj spuščali v državo ob obljubi, da se bodo poročile s svojimi partnerji. Njihov vstop v državo je bil odvisen tudi od njihove narodnosti (Moroney 2012: 35). Deirdre Moloney navaja primer treh danskih sester, ki jih je komisar zavrnil kot moralno neustrezne, ker je ena že imela spolne izkušnje (Deirdre 2012: 35). Med podobne zakone spada tudi zakon iz leta 1891 (Logar 2017: 19), ki naj bi vključil klavzulo LPC (*likely to become public charge* / 'lahko postane družbeno breme') o z moralnega vidika sumljivih osebah (Perry 2016: 140). To naj bi bil dejanski začetek sistematičnega preverjanja migrantov (*Statistical Review of Immigration 1820–1910*: 366). Moralnega propada so se bali tudi zakonodajalci evropskih držav, predvsem Ogrske, ki so v vplivu ameriške države na svoje državljane prepoznale moralno grožnjo (Brunnbauer 2016: 154).

Zakon o priseljevanju iz leta 1893 je dovoljeval izgon poligamistov (An Act in Amendment to the Various Acts Relative to Immigration 1893: 1084). Izločitev političnih skupin se je po navadi nanašala na konkretne družbene dogodke. Že leta 1798 je izšla serija zakonov z naslovom The Alien and Sedition Acts. Eden med njimi – Aliens Friends Act (An Act Concerning Aliens) od 25. junija 1798 – je omogočal predsedniku države deportirati tujca, ki bi bil lahko potencialno nevaren ameriški družbi. Kapitani ladij so morali sporočiti prihod vseh tujcev; ti so morali biti na podlagi zakona Customs of Port (prav tam) ustrezno zabeleženi. Podobno je deloval tudi Aliens Enemies Act (An Act Respecting Alien Enemies) iz leta 1798, ki je omogočil deportacijo tujcev moškega spola, če so predstavljali grožnjo ameriški družbi (prav

tam) in so pripadali državi, ki je bila v vojni z ZDA; ta zakon je bil namenjen predvsem Francozom (Kanstroon 2007: 55). Leta 1901 so se pokazale posledice atentata na ameriškega predsednika McKinleyja; najprej so se odrazile v zakonodaji, nato pa še v možnostih prihoda anarhistov v državo.

Prihajajoče migrante so najbolj privlačile možnosti dela in dobička, zato je morala ameriška zakonodaja urediti pogoje pogodbenega dela. Foran Act iz leta 1885 je skušal naselitev upočasniti s prepovedjo vnaprejšnjega pogodbenega dela. Izhajajoč iz dejstva, da so delavcem delo obljubili agenti ladijskih družb (Light 2013: 6), je hkrati nasprotoval njihovemu poslovanju. Zakon o priseljevanju iz leta 1891 je potrjeval ilegalnost že vnaprej sklenjenih pogodb za delo kot tudi že obljubljenemu delu na podlagi oglasa (An Act to Regulate Immigration 1891: 1084), čeprav zakon iz leta 1903 ne vključuje ilegalnega pogodbenega dela intelektualcev (An Act to Regulate Immigration 1903: 1214). Že omenjena Dillinghamova komisija je v zaključku svoje raziskave migracijo neposredno povezala s poslovanjem ladijskih družb, ki so vabile svoje stranke, naj plujejo v Združene države, kjer bodo gotovo sanjsko zaslužile. Prav ta komisija, ki je formalno delovala med letoma 1907 in 1910, je bila vrhunec procesa omejevanja migracij v Ameriko. Ugotovila je, da so skoraj vsi evropski migranti prišli obiskat ali družino ali prijatelje, z lastno raziskavo na evropskih tleh pa, da migranti prihajajo predvsem zaradi močne propagande agentov (Light 2013: 4). Da ne bi spodbudili še močnejših migracij, je zakon iz leta 1893 določil, da morajo predstavniki ladijskih družb svoje agente obvestiti, naj se ukvarjajo le s tistimi, ki so vozovnice nameravali kupiti že brez njihovega vpliva. Agenti so morali imeti na vidnem mestu v pisarni tudi kopijo zakona (An Act to Facilitate the Enforcement of the Immigration and Contract Labor Laws 1893: 570).

Da bi ladijske družbe prepeljale čim večje število potnikov (migrantov), so najemale tolmače, ki bi jih pripravili na pogovor ali pa so kontaktirali družino in filantropska društva, ki bi jim olajšali vstop (Feys 2013: 74). Na podlagi tega sklepam, da so družbe potnikom pomagale uresničiti njihove sanje o Ameriki, oni pa so jim zagotavljali dobiček, obe strani pa sta nasprotovali tretji, to je ameriški državi, ki jo je zanimala lastna varnost. Kljub temu da je država iskala načine za zagotovitev varnosti s pomočjo nadzora seznamov potnikov, se je verjetno borila proti poskusom ladijskih družb in njihovih strank, da bi se izognili zakonom.

Zaradi težav z infekcijami so bile restrikcije najstrožje v zdravstvu. Zakon iz avgusta 1882 je povečal nadzor nad pristanišči in ladjami, s katerimi so pluli potniki, ter popolnoma izločil obsojence, duševno bolne, idiote in nesposobne, »ki bi lahko bili v breme družbi« (An Act to Regulate Immigration 1882: 214). Po Dillinghamovi komisiji je bil to prvi resni poskus regulacije migracij v ZDA (*Statistical Review of Immigration 1820–1910*: 366). Zdravstveno stanje potnikov naj bi po zakonu iz leta 1893 preverjal tudi za to odgovoren 'ladijski zdravnik ali kirurg' (*surgeon*). S pomočjo seznamov ladijskih potnikov lahko ugotovimo, da vse naštetosti niso bile najpomembnejši razlog za deportacijo. Najpomembnejša sta bila zdravstveno stanje in pogodbeno delo, ki pa sta stopila v ospredje le med masovnimi migracijami. Na

podlagi politične opredelitve so bili javno izloženi anarhisti, na podlagi spolnega življenja pa poligamisti; ker pa jih ni bilo mogoče takoj preveriti, jih verjetno na seznamih tudi ni nihče navajal.

## **VLOGA SEZNAMOV LADIJSKIH POTNIKOV V ZGODOVINSKI RAZISKAVI: NEPOPOLNOST PODATKOV**

Po Antoniusu Holtmannu so sezname ladijskih potnikov vir z najboljšejšo zbirko podatkov o selitvah vsakega posameznika, vse od pristanišča do ladijske družbe, s katero je potoval (Holtmann 2003: 1). Josef Ehmer in Annemarie Steidl v projektu iz leta 1998 opozarjata, da so zgodovinarji do takrat uporabljali statistične podatke iz evropskih pristanišč, ne pa, z vidika Avstro-Ogrske, tudi iz ameriških (Ehmer idr. 1998: 11). Za to se moramo zahvaliti Balchevemu institutu v Pennsylvaniji, ki je objavil nekaj izdaj z obravnavami seznamov potnikov (Steidl 2007: 66). Sezname potnikov so uporabni za natančnejše podatke o potnikih, njihovem poklicu, načinu potovanja, sorodnikih in remigraciji (prav tam: 12). Te raziskave omogoča ogromno število digitaliziranih seznamov potnikov iz obdobja 1820–1897, med njimi Free Online New York Passenger List, do leta 1914 pa projekt Ellis Island. Da bi ugotovila razlike, ki so jih pri izpolnjevanju in zapisih povzročili obvezni ameriški migracijski in potniški zakoni iz let 1893, 1903 ter 1907, sem za analizo izbrala sezname potnikov iz let 1901, 1905 in 1910. S seznamov potnikov zbrane podatke je treba previdno ocenjevati. Aleksej Kalc je v svojem članku poudaril možnosti uporabe tega gradiva kot podlago za vzorčne študije. Piše, da »je njegova vrednost tem večja, čim pomankljivejši so tradicionalni kvantitativni viri« (Kalc 1996: 56). Naj dodam, da so ti podatki uporabni tudi za preučevanje verodostojnosti zapisov in vzrokov, zaradi katerih so ladijske družbe skupaj s potniki ob registraciji navajale zavajajoče podatke; ti podatki dejansko prinesejo več, kot bi prinesli v svoji popolni obliki.

## **SEZNAMI POTNIKOV LADIJSKE DRUŽBE NORDDEUTSCHER LLOYD IZ LET 1901, 1905 IN 1910 IN NJIHOVE SPREMEMBE NA PODLAGI ZAKONOV IZ LET 1893, 1903 IN 1907**

Analizirala sem zbrane sezname potnikov ladijske linije, ki je plula iz Bremna v New York, za leta 1901, 1905 in 1910; objavljeni so na spletni strani Liberty Ellis Foundation. Od leta 1907 so se sezname imenovali List or Manifest of Alien Passengers for the United States Immigration Office at Port of Arrival (Kalc 2018: 109), s čimer so poudarjali povezavo med prometom in migracijo ter dolžnostjo Urada za priseljevanje, kar izhaja prav iz delovanja Dillinghamove komisije, ki je preučevala vzroke in možne učinke migracijskega procesa oziroma samih migrantov na ameriško družbo.

## POTOVANJE IZ BREMNA S PODJETJEM NORDDEUTSCHER LLOYD

V članku obravnavam sezname ladijskih potnikov podjetja Norddeutscher Lloyd iz Bremna. Na začetku 20. stoletja je dober del v ZDA namenjenih izseljencev potoval iz severnoevropskih pristanišč, med njimi sta prednjačila nemška Bremen oziroma Bremerhaven in Hamburg. Tu sta imeli svoj sedež največji nemški ladijski družbi Norddeutscher Lloyd in Hamburg Amerika Linie (Hapag), ki sta se leta 1892 skupaj z družbama Red Star Line in Holland America Line združili v ladijski kartel Nordatlantischer Dampfer Linien Verband (NDLV) (Feys 2007: 16). Kartel je obvladoval srednji in vzhodnoevropski kontinentalni izseljenski promet v Severno Ameriko (Kalc 1992: 481). Čeprav so potniki odhajali na pot iz nemških pristanišč, Nemci niso bili najštevilčnejši potniki. Po Badu je med letoma 1894 in 1910 v Združene države odpotovalo le 11 odstotkov Nemcev, vsi drugi so bili tujci (Bade 2000: 152). Za pot v Ameriko so se v tem času odločali predvsem posamezniki iz Vzhodne in Jugovzhodne Evrope. Med njimi so bili številni na sezonskem delu v Nemčiji, kjer so lahko naleteli na »agitacijo« agentov nemških ladijskih družb, npr. že omenjenega podjetja Norddeutscher Lloyd, ki so jih prepričali, da so se odpravili na pot. Poročilo Dillinghamove komisije omenja F. Misslerja, ki je posloval tako v Bremnu kot tudi v vseh deželah Avstro-Ogrske (Dillingham Commission Report 1910: 98). Misslerjevo agencijo je raziskovala tudi Irena Puskas (1982: 102). Tekmovanje ladijskih podjetij za pridobitev potnikov je bilo značilno že od konca 19. stoletja. Iz grškega primera je razvidno, da je imelo leta 1905 deset podjetij iz sedmih evropskih držav svoje agencije v Grčiji (Boyden idr. 2013: 46). Med sabo so tekmovala tudi »domača podjetja«, npr. iz Bremna in Hamburga (nemška Norddeutscher Lloyd in HAPAG). Po mnenju priče iz Rusije, ki je komentirala dogajanje v pristaniščih, so bili ljudje celo prisiljeni zamenjati linijo v korist enega ali drugega ladijskega podjetja (Newman 2000: 4).

Nemški pristanišči pa nista tekmovali le med seboj, ampak tudi z vse močnejšimi evropskimi pristanišči, zlasti z britanskimi in nizozemskimi. Puskaseva omenja »vojno cen« iz leta 1904, ki je nemška podjetja prisilila k znižanju cen vozovnice na 90 kron, zaradi česar so izgubila 8,5 milijona nemških mark (Puskas 1982: 99). Podjetje je imelo v lasti vrhunske ladje, ena med njimi je bila Gneisenau, ki naj bi prvič odplula v New York 18. marca 1905, njena zadnja pot pa bi morala biti 3. aprila 1909. Podatki podjetja niso povsem zanesljivi, saj se je njihov večji del izgubil (Feys 2013: 6).

## PRIMERJAVA ZBRANIH SEZNAMOV LADIJSKIH POTNIKOV Z ZAKONI: SPREMEMBE IN POSEBNOSTI

Pravila za urejanje seznamov ladijskih potnikov iz leta 1901 so izhajala iz zakona, sprejetega 3. marca 1893. Obrazec je vseboval 20 kategorij. Očitni vpliv omenjenega zakona je bil razviden iz vprašanja, ki se je nanašalo na potencialne moralne grožnje, in sicer, ali je posameznik poligamist. Omenjeni zakon še ne omenja odgovornosti

ladijskih družb za deportacijo neustreznih kandidatov, temveč le finančno kaznovanje 10 dolarjev za *collector of customs* ('carinik') za vsako nezabeleženo osebo (An act to Facilitate the Enforcement 1893: 570). Po zakonu je moral *inspector of arriving aliens*, 'nadzornik prispelih tujcev' vsakega sumljivega potnika napotiti na poseben pogovor, na katerem so bili prisotni vsaj štiri inšpektorji, za sprejem pa so se morali odločiti vsaj trije. Seznamu potnikov linije, ki je 27. 2. 1901 odplula iz Bremna v New York, ni bilo dodanih izjav zdravnika in ladijskega kapitana, kot je bilo to značilno v letih 1905 in 1910. Mogoče je, da se izjava ni ohranila in je zato ameriški arhiv iz Washingtona ni digitaliziral. Pregledala sem še dva seznama iz leta 1901. Seznam linije H. H. Meier od 9. maja 1901 ne vsebuje nobene izjave, le seznam 30 potnikov. Izjava z datumom 20. avgust 1901 (ladja Kaiser Wilhelm der Grosse) je popolnoma ohranjena, vsebuje tudi izjavo zdravnika in podatke o vseh potnikih.

Leta 1905 je izjava vsebovala 21 vprašanj, leta 1905 se je pojavilo dodatno vprašanje o anarhistični politični orientaciji, čeprav je bilo to vprašanje z zakonom urejeno že leta 1901, izjave pa so tokrat izhajale iz zakona iz leta 1893. Vsota priporočenih finančnih sredstev potnikov se je s 30 povišala na 50 dolarjev. Do spremembe je prišlo tudi pri zdravstvenih pregledih, ki jih je moral ob prihodu na ameriška tla izvajati zdravnik iz United States Marine Hospital Service; ta je moral imeti v nasprotju z zakonom iz leta 1893 vsaj dveletno prakso. Določene skupine, med njimi že omenjeni poligamisti in anarhisti, ali osebe z že pridobljeno delovno pogodbo naj bi bile izločene, tisti, ki so jih pripeljali, pa so bili lahko kaznovani s 1000 dolarji (An Act to Facilitate the Enforcement 1903: 1215). Tako so, v primerjavi s prejšnjim zakonom, povečali odgovornost predstavnikov ladijskih družb za izbor potnikov.

Leta 1910, v času Dillinghamove komisije, so se na seznamih ladijskih potnikov pojavile bolj izrazite spremembe. Sezname iz leta 1910 so bili pripravljene na podlagi zakona iz leta 1907, ki je migracije utemeljeval v mednarodnem smislu in dovoljeval nadzor ameriških organov nad prometom tudi na evropskih tleh oziroma v pristanišču, iz katerega so potniki odhajali (An Act to Facilitate the Enforcement 1907: 903). Pri analizi seznama izhajam iz linije ladje George Washington, ki je marca 1910 plula med Bremnom in New Yorkom. Manifest je vseboval dva lista s skupaj 29 vprašanji, ki sta jih na posameznih listih dopolnjevali še izjavi kapitana in zdravnika. Po raziskavi Stockhammerja in Steidla naj bi bilo vprašanj kar 35 (Stockhammer 1910: 6). Vprašanja se niso bistveno spremenila, razširila pa so se z novimi (o bolj intimnih zadevah), ki so posredno izražala odnos do množice migrantov. Zahtevali so fizične oznake vsake osebe, kar je povzročilo občutek, da so migranti potencialni zaporniki. Spraševali so tudi za naslove, s katerih so prišli, in ne le za tiste, kamor so bili namenjeni. Najverjetneje so poskušali za vsakega posameznika poiskati čim več podatkov. Na listu 216 je bila navedena izjava zelo izkušenega zdravnika (s 15 leti prakse). Povečalo se je tudi število deportiranih, ki jih v naslednjem poglavju prikazujem kot dokaz kršitve v prejšnjih poglavjih omenjenih delov zakonov.

## NAVAJANJE ZAVAJAJOČIH IN NEPRAVILNIH PODATKOV: RESTRIKTIVNI ELEMENTI IN DEPORTACIJE

Pri analizi deportacij potnikov s seznamov so uporabni predvsem že omenjeni dodatni zapisi o tujcih, ki so bili poslani na poseben pogovor (Record of Aliens Held for Special Inquiry). Zaradi dodatnih komentarjev komisarjev si lažje predstavljamo razloge za deportacijo in dogajanje med pogovorom; dogajanja med pogovorom ob vstopu namreč ne moremo poznati.

Komisarji za deportacijo so se najbrž odločali na podlagi zakonov, hkrati pa so se ob srečanju z določenimi posamezniki zanašali tudi na lastni občutek. Lažje je bilo potnikom, ki so nameravali obiskati sorodnike ali prijatelje. Seznami potnikov so zahtevali navedbo točnega naslova sorodnika, česar niso vedno izpolnili, podatki so bili v mnogih primerih zelo splošni, na primer *uncle Brooklyn*, 'stric Brooklyn', kar je bilo navedeno na seznamu potnikov iz leta 1901 (List or Manifest of Alien Immigrants). Na seznamih iz let 1905 in 1910 sem našla malo bolj jasno napisane podatke, na primer *uncle Alois Horvath 2248 North Street, Philadelphia, Pennsylvania*; tudi o njihovi resničnosti lahko dvomimo. Potniki so najverjetneje skušali z natančnejšimi podatki ameriške oblasti prepričati, da v ZDA prihajajo z iskrenimi nameni.

Naslovov po navadi ni bilo mogoče neposredno preveriti, oblasti pa so ugotovile, da so si jih potniki tudi izmišljevali. Čeprav so v ZDA imeli sorodnika, so ga ob prihodu le redki tudi obiskali. Raziskava Guntherja Pecka navaja, da so fiktivne naslove navajale agencije, ki so posredovale delo, med njimi Sklirisova agencija, ki je imela sedež med številka 531 in 539 West Second Street South v grškem naselju v Salt Lake Cityju; ta naslov so potniki/migranti tudi navajali za svoj cilj. Raziskava njihovih odgovorov leta 1912 je pokazala, da je med omenjenima hišnima številka 23 različnih bratrancev in 16 bratov iz ločenih družin (Peck 2000: 96). Raziskava Marcusa Browna iz leta 1904 je pokazala, da je kar 46 od 105 potnikov na ladijski liniji Cunard posredovalo fiktivne naslove, ki jih ni bilo mogoče najti. V primeru sumljivih ali zaradi ročnega izpolnjevanja neberljivih naslovov so posameznike poklicali še na dodatni pogovor. Kot piše Torsten Feys, so imeli inšpektorji malo časa za dodatno preverjanje. Prva kontrola je bila kratka, trajala je le eno do dve minuti. Na podlagi pogovora so sprejeli med 80 in 95 odstotkov migrantov, preostali so šli še na nadaljnje preverjanje (Feys 2013: 74), med njimi pa je bilo na koncu samo nekaj deportiranih. Z izbranih seznamov je bilo iz ene linije deportiranih približno osem do deset oseb. Eden od potnikov madžarske narodnosti, Iren Artim, ki je bil pozneje iz originalnega dokumenta prepisan kot Trzis Artim, je navedel, da gre obiskat brata, ki naj bi živel na naslovu *New York 170-165 Vth Street*. Povsem mogoče je, da niso bili prepričani, ali je namenjen v New York kot eno od ameriških zveznih držav ali v mesto NYC. Zanimiv je tudi primer Jana Urbanka, ki je bil zaradi nepopolnega naslova poslan na dodatni pogovor. Po podatkih s seznama je nameraval obiskati svaka Jozefa Herbačka, njegove podatke pa je navedel v nerazumljivi obliki *Jozef Herbacek 1809 J*. Nihče od njiju ni bil deportiran.

Deportacije so dokaz, da se navedeni podatki niso ujemali s pogoji za vstop. Ženske so, denimo, pogosto potovale skupaj s svojimi otroki, pri tem pa so navedle tudi naslov svojih mož. V resnici je bilo nemogoče preveriti, koliko otrok jim je sledilo in ali so može izkoristile zgolj za to, da so si olajšale potovanje. Steidl je navedla primer iz avstrijskega mesta Salzkammergut, kjer so v kroniki našli dokaze o ženskah, ki so zapustile svoje može in odšle v ZDA (Steidl 2005: 69). Še zlasti je bilo domači naslov potnika težko preverjati od leta 1907, če je bil napisan npr. v obliki – *Jan Czech Lokta Galicia*.

Najpogostejša oznaka za »sumljive osebe« je bila LPC – *likely to become public charge*, 'lahko postane družbeno breme', kar v vseh primerih ni povsem razumljivo. Očitno je, da je bilo največ sumljivih oseb iz Vzhodne in Jugovzhodne Evrope, lahko bi rekli, da so bili Slovani. Tako sklepam na podlagi priimkov, kot so Dumlovic, Makevic, Graovac, Rapowa, Runjaic, Cygan in Kozik, na kar je lahko vplivalo tudi negativno mnenje o novi imigraciji. Leta 1905 je bil deportiran 17-letni samski Hrvat Daul Rapaic, ki ni navedel nobenega očitnega razloga za deportacijo, potoval pa je s svojo družino. Po dodatnem zapisu posebnega pogovora izvemo, da je bil Daul Rapaic kot edini med sopotniki označen kot LPC, drugi pa so skupaj potovali naprej. Makevic in Graovac sta trpela za konjunktivitisom, očesno boleznijo, bila sta nepismena, njuni imeni sta v angleški različici nepopolno zapisani. Predvidevamo lahko, da sezname niso izpolnjevali posamezniki sami, kar potrjuje tudi isti rokopis v enem od delov (seznam 30 potnikov).

Iz zdravstvenih razlogov so na tej liniji deportirali potnika Martina Kožika, ki je najverjetneje potoval skupaj z očetom. Kožik je bil 27-letni samski kmet z zdravstveno težavo (ankilozo). Na to odločitev so vplivali zakoni iz let 1893 in 1903, ki so prepovedali vstop fizično nepopolnim osebam; obravnavani zapis ga je označil kot LPC. Zaradi družine, ki se je zdravila v bolnišnici, je bil zavržen tudi Petro Rapowa.

Sumljivi so bili tudi neporočeni moški in ženske, starejši od 25 let, ki so potovali z otroki. Omenila sem že, da so se ženske, ki so potovale s svojimi partnerji, a niso bile poročene, morale pred potovanjem poročiti. Na seznamu ladijskih potnikov iz leta 1906 sem zasledila primer 29-letne ženske nemške narodnosti, ki je navedla, da je samska, iz zapisa dodatne kontrole pa se da ugotoviti, da je že bila poročena. S podatki o zakonskem statusu so najbrž skušali tudi goljufati. 27-letni oče otroka, ki ga je peljal s seboj, je napisal, da je poročen, vendar je v zapisu srečanja z inšpektorji navedeno, da še nikoli ni bil poročen. Ob datumu sprejema znova piše, da je že poročen. Poleg njega omenjam tudi 58-letno žensko, ki je prav tako navedla, da je poročena, medtem ko je bila v zapisu inšpektorjev zabeležena kot vdova (List or Manifest of Passenger Aliens, 8. 11. 1906).

Leta 1910 so bili že vsi deportirani označeni kot LPC. Tega leta sta bila deportirana dva Rusina iz avstrijskega dela Avstro-Ogrske (Galicije), eden od njiju je navedel, da si je že priskrbel pogodbeno delo, kar je bilo prepovedano že po zakonu iz leta 1893. Morda je bila za njun izgon kriva nepismenost, ki je bila med prepovedmi za vstop navedena šele leta 1917. Omenjam še Karla Bartho, ki je bil leta 1910 deportiran zaradi



težav z očmi, Poljaka Jana Tobijnoga, ki je imel težave z arterijo, in Hnata Hapyna ter Josefa Krasickija, ki sta bila deportirana zaradi vnaprej sklenjene pogodbe. Omeniti je treba še bojazen pred infekcijskimi boleznimi, ki se je od leta 1897 pojavljala zaradi primerov trachome, očesne infekcijske bolezni, klasificirane v ameriški bolnišnici Public Health and Marine Hospital (*Statistical Review of Immigration 1820–1910*: 366).

V primeru Krasickija je bila verjetno vzrok nekdanja zaporna kazen. Pri tem je pomembno, da to, kar je skušal zamolčati, na seznamu ni bilo navedeno. Težko pa je ugotoviti, kako so komisarji vedeli, da ta podatek drži. Lahko da je Krasickij že obiskal ZDA, čeprav je navedel prav nasprotno, in je bil zato že zabeležen. Sčasoma so restriktivni elementi postajali strožji, vrhunec pa so dosegli leta 1910 z Dillinghamovo komisijo. Z njo so se verjetno povečali tudi poskusi izogibanja zakonom in iskanja novih načinov goljufanja tako potnikov kot ladijskih družb.

## SKLEP

Posledice migracijskih zakonov iz let 1893, 1903 in 1907 so se odražale na seznamih potnikov iz let 1901, 1905 in 1910. V resničnost podatkov s seznamov lahko dvomimo, v kolikor predvidevamo, da so potniki pri njihovem navajanju skušali goljufati. S to tezo se je leta 1904 ukvarjal že Marcus Brown, iz njegovih ugotovitev pa je izhajal raziskovalec Torsten Feys, ki se je prav tako ukvarjal z migracijo kot poslovno zadevo. Strinjam se z njegovimi zaključki, da je bilo nekatere podatke, ki so jih navajali potniki, nemogoče takoj preveriti – mednje sodijo politična usmeritev in naslovi sorodnikov, ki so jih nameravali obiskati.

Naslove sorodnikov so lahko navajali zgolj zato, ker je bilo to obvezno, pri tem pa so jim pomagale tudi agencije, ki so jim posredovale delo. Gunther Peck se je s tem ukvarjal na primerih agencije v Salt Lake Cityju. Iz moje raziskave, ki je nastala na podlagi seznamov ladijskih potnikov in zapisov iz pogovorov s komisarji, izhaja, da so potniki poskušali goljufati pri podatkih o naslovu, že sklenjenih pogodbah, pri navedbi morebitne zaporne kazni in podatkih o zakonskem statusu; poročeni posamezniki so se zdeli zanesljivejši. Ob primerjavi obveznega manifesta s podatki iz zapisa o tistih, ki so bili poslani na dodatni pogovor, bi lahko našli neujemajoče primere. Potnik Josef Krasickij je navedel, da že ima sklenjeno pogodbo, kar je bilo ilegalno, vendar je bil po podatkih iz zapisa Record of Aliens Held for Special Inquiry najpomembnejši razlog za deportacijo njegova zaporna kazen, kar pa na prvem seznamu ni bilo navedeno.

S tem ne poudarjam le uporabnosti seznamov ladijskih potnikov, saj so ti pomagali zgolj razporediti tiste, ki so bili sprejeti takoj, in tiste, ki so bili še sumljivi, poudarjam tudi uporabnost dodatnih informacij na zapisih. Potrdilo se je, da so bili prenašalci infekcijskih bolezni brez izjeme deportirani, pri drugih pa je bilo odločilno mnenje dežurnih komisarjev, ki so se gotovo odločali tudi na podlagi lastnih občutkov, kot je bilo to v primeru (najverjetneje) sorodnikov Rapaica, od katerih je bil le

eden brez navedenega razloga označen kot LPC. Če v uradni statistiki Dillinghamove komisije primerjamo kronološke podatke med letoma 1892 in 1910, opazimo, da je kategorija »pogodbno delo« vse manj pomembna, medtem ko je kategorija LPC skupaj z zdravstvenimi razlogi nenehno naraščala (Number Cause of Debarments: 367). Komisija navaja tudi, da se v kategoriji fizičnih ali mentalnih bolezni število deportiranih ni spremenilo, kar razume kot posledico odličnega selekcijskega dela ameriške inšpekcije v evropskih pristaniščih leta 1907, hkrati pa priznava, da je bil razlog lahko tudi nezmožnost preverjanja vsakega primera posebej; psihičnih bolezenskih znakov ni mogoče takoj opaziti (Conclusions of the Comission: 26–28). Slabo fizično stanje je lahko pomenilo le nižjo telesno maso, kar Zahra povezuje predvsem z migracijo judov (Zahra 2018: 40). V primeru nepopolno navedenega naslova so bili potniki običajno poslani na dodatni pogovor, na koncu pa od njih nihče ni bil deportiran. Ni mogoče vedeti, kaj točno se je dogajalo med pogovorom, čeprav bi bil to gotovo najpomembnejši vir, ki bi lahko pojasnil deportacijo določenih oseb. Ni mi uspelo dovolj natančno ugotoviti, v kolikšni meri so potnikom pri tem pomagale tudi ladijske družbe, se je pa s to tezo ukvarjal že omenjeni Torsten Feys in s tem odprl temo, vredno nadaljnjega raziskovanja.

## VIRI IN LITERATURA

- Abrams, Kerry (2005). Polygamy, Prostitution, and the Federalization of Immigration Law. *Columbia Law Review* 105/3, 641–716.
- Bade, Klaus (2000). *Migration in European History*. New Jersey: Willey-Blackwell.
- Boyden, Michael, Krabbendan, Hans, Vandebussche, Liselotte (2013). *Tales of Transit: Narrative Migrant Spaces in Atlantic Perspective, 1850–1950*. Amsterdam: University Press.
- Brunnbauer, Ulf (2016). *Globalizing Southeastern Europe: Emigrants. America and the State since the Late 19th Century*. United States of America: Lexington Books.
- Cole, Mike (2015). *Racism: A Critical Analysis*. London: Pluto press.
- Ehmer, Josef, Steidl, Annemarie, Zeitlhofer, Hermann (1998). *Migration Patterns in Late Imperial Austria*. Wien: Österreichische Akademie der Wissenschaften Postgasse.
- Feys, Torsten (2007). *Where all Passenger Liners Meet: The Port of NY as a Nodal Point for the Transatlantic Migrant Trade 1885*. Helsinki: XIV International Economic History Congress.
- Feys, Torsten (2013). *The Battle for the Migrants: The Introduction of Steamshipping on the North Atlantic and its Impact on the European Exodus. St. John's. New Foundland*. St. John's: International Maritime Economic History Association.
- Frank, Tibor (2009). The Dillingham Report, Franz Boas and the Measurement of US. New Immigrants, 1907–1911. *Internal, International, and Transatlantic Moves in the 19th and Early 20th centuries* (eds. Annemarie Steidl, Joseph Ehmer). Gottingen: V&Runipress, 101–119.

- Holtman, Antonius (2003). Fifteen Years of Germans to America: Truly Enough! Passenger Lists and their Outcomes. *Aemi Journal* 2003, 1–15.
- Kalc, Aleksej (1992). Prekooceansko izseljevanje skozi Trst. *Zgodovinski časopis* 46/4, 479–496.
- Kalc, Aleksej (1996). Ladijske potniške evidence kot vir za zgodovino izseljenstva, s posebnim ozirom na izseljenske sezname tržaškega pristanišča. *Dve domovini / Two Homelands* 7, 51–69.
- Kalc, Aleksej (2018). Izseljevanje iz Beneške Slovenije v Severno Ameriko na začetku 20. stoletja na podlagi ladijskih potniških seznamov. *Dve domovini / Two Homelands* 47, 107–126.
- Kanstroon, Dan (2007). *Deportation Nation: Outsiders in American History*. United States of America: Harvard University Press.
- LeMay, Michael (1999). *Us Immigration and Naturalization Laws and Issues: A Documentary History*. Westport: Greenwood Press.
- LeMay, Michael (2013). *Transforming America. Perspectives on U.S. Immigration: The Making of a Nation of Nations: The Founding to 1865*. Santa Barbara, Denver, Oxford: Praeger.
- Light, Ivan (2013). The Migration Industry in the United states, 1882–1924. *Migration Studies* 1/3, 258–275.
- Logar, Žan (2017). *Zajezitev zlatega toka priseljevanja: Razvoj priseljenske zakonodaje v ZDA*. Ljubljana: Filozofska fakulteta.
- Lund, John (1994). Boundaries of Restriction: The Dillingham Commission. *History Review* 6, <http://www.uvm.edu/~hag/histreview/vol6/lund.html> (23. 11. 2018).
- Molina, Natalia (2006). *Fit to be Citizens?: Public Health and Race in Los Angeles, 1879–1939*. Los Angeles: University of California Press.
- Moloney, Deirdre (2012). *National Insecurities: Immigrants and U.S. Deportation Policy since 1882*. North Carolina: The University of North Carolina Press.
- Newman, Aubrey (2000). *Trains and Shelters and Ships*. Leicester: University of Leicester.
- Paradiž, Ana Cergol (2016). *Evgenika na Slovenskem*. Ljubljana: Založba Sophia.
- Peck, Gunther (2000). *Reinventing Free Labor: Padrones and Immigrant Workers in North American West*. Cambridge: University Press.
- Puskas, Julianna (1982). *From Hungary to the United states (1880–1914)*. Budapest: Akademiai Kiado.
- Szucs, Loretto Denis, Hargreaves Luebking, Sandra (1997). *The Source: A Guidebook to American Genealogy*. Salt Lake City: Ancestry.
- Steidl, Annemarie, Stockhammer, Engelbert, Zeitlhofer, Hermann (2007). Relations Among Internal, Continental and Transatlantic Migration in Late Imperial Austria. *Social Science History* 31/1, 61–92.
- Steidl, Annemarie (2005). Young, Unwed, Mobile and Female Women on Their Way from the Habsburg Monarchy to the United States of America. *Przeglad Polonijny* 4, 55–77.

Stockhammer, Engelbert, Steidl, Annemarie, Zeitlhofer, Hermann (2010). The Effect of Wages and Demografic Pressure on Migration from the Habsburg Monarchy to the United states of America in 1910. *Economic History Yearbook* 51/2, 201–222.

Zahra, Tara (2016). *The Great Departure: Mass Migration from Eastern Europe and the Making of the Free World*. New York: W. W. Norton and Co.

## Zakoni in seznamih potnikov

*Conclusions of the Comission: Abstracts of Reports of the Immigration Comission 1*, <https://babel.hathitrust.org/cgi/pt?id=umn.31951p00832719i;view=1up;seq=11> (21. 10. 2018).

*An Act Concerning Aliens, 1798*, <https://memory.loc.gov/cgi-bin/ampage?collId=llsl&fileName=001/llsl001.db&recNum=693> (15. 6. 2018).

*An Act to Facilitate the Enforcement of the Immigration and Contract Labor Laws of the United States, 1893*, <https://www.loc.gov/law/help/statutes-at-large/52nd-congress/session-2/c52s2ch206.pdf> (21. 8. 2018).

*An Act to Regulate Immigration, 1882*, <https://www.loc.gov/law/help/statutes-at-large/47th-congress/session-1/c47s1ch376.pdf> (23. 1. 2018).

*An Act to Regulate the Immigration of Aliens and the Residence of Aliens in the United States, 1917*, <https://www.loc.gov/law/help/statutes-at-large/33rd-congress/session-2/c33s2ch213.pdf> (26. 10. 2018).

*An Act to Regulate the Immigration of Aliens into the United States, 1903*, <https://www.loc.gov/law/help/statutes-at-large/57th-congress/session-2/c57s2ch1012.pdf> (17. 10. 2018).

*Congressional Record* 23. 2. 1891, 9, <https://onlinebooks.library.upenn.edu/webbin/serial?id=congrecorecord> (24. 10. 2018).

*Statistical Review of Immigration 1820–1910*. Dillingham Comission, <https://archive.org/details/reportsofimmigra03unitrich/page/n5> (24. 10. 2018).

Emigration Conditions in Europe. *Dillingham Comission Report 1910*, [https://archive.org/stream/reportsofimmigra04unitrich/reportsofimmigra04unitrich\\_djvu.txt](https://archive.org/stream/reportsofimmigra04unitrich/reportsofimmigra04unitrich_djvu.txt) (13. 11. 2018).

Number Cause of Debarment at all US Ports During the Period of July 1891–June 1910, *Dillingham Comission: Reports of the Immigration Comission*, <https://babel.hathitrust.org/cgi/pt?id=mdp.35112101728469;view=1up;seq=11> (31. 10. 2018).

*Document 35: Act of February 26, 1885: Prohibition of Contract Labor (Foran Act)*, [https://books.google.si/books?id=a1Aclme7AMkC&pg=PA56&lpg=PA56&dq=foran+act+1885&source=bl&ots=tKZmEbrT4t&sig=EvAj\\_3GmGi1emRW\\_rEE3xyCTZ60&hl=sk&sa=X&ved=0ahUKEwjWoorhOL7bAhUSbVAKHR-NBBFMQ6AEIRjAD#v=onepage&q=foran%20act%201885&f=false](https://books.google.si/books?id=a1Aclme7AMkC&pg=PA56&lpg=PA56&dq=foran+act+1885&source=bl&ots=tKZmEbrT4t&sig=EvAj_3GmGi1emRW_rEE3xyCTZ60&hl=sk&sa=X&ved=0ahUKEwjWoorhOL7bAhUSbVAKHR-NBBFMQ6AEIRjAD#v=onepage&q=foran%20act%201885&f=false) (21. 11. 2018).

*List or Manifest of Alien Passengers for the United States, 1901*, <https://www.libertyellis-foundation.org/passenger-details/czoxMjoiNjA0OTgxMTQwMDA2ljs=/czo4Oij-tYW5pZmVzdCI7> (12. 9. 2018).

*List or Manifest of Alien Passengers for the United States, 1910*, <https://www.libertyellis-foundation.org/passenger-details/czoxMjoiMTAxMjk2MDUwMTMxIjs=/czo4O-iJtYW5pZmVzdCI7> (13. 11. 2018).

*List or Manifest of Alien Passengers for the United States, 1905*, <https://www.libertyellis-foundation.org/passenger-details/czoxMjoiMTAyMzk1MDEwODExIjs=/czo4OiJ-tYW5pZmVzdCI7> (13. 11. 2018).

*List or Manifest of Alien Passengers for the United States, 1906*, <https://www.libertyellisfoundation.org/passenger-details/czoxMjoiMTAyMzlyMTIwNDUyIjs=/czo4O-iJtYW5pZmVzdCI7> (13. 11. 2018).

*Passenger Act 1819*, [http://www.norwayheritage.com/articles/templates/historic\\_documents.asp?articleid=21&zoneid=18](http://www.norwayheritage.com/articles/templates/historic_documents.asp?articleid=21&zoneid=18) (22. 9. 2018).

*The Paige Act of 1875*, <https://loveman.sdsu.edu/docs/1875Immigration%20Act.pdf> (13. 11. 2018).

## SUMMARY

### MISLEADING DATA ON PASSENGER LISTS AS A CONSEQUENCE OF RESTRICTIVE AMERICAN MIGRATION LEGISLATION

Lucia KULIHOVA

The end of the 19th century was marked by the phenomenon of mass migration from Europe to the United States, which generated bipolar attitudes towards it. The supporters of limited migration, represented above all by certain political currents, enforced restrictive elements via legislation. The passenger lists we analysed contain not only basic information about the passengers, but also an insight into events during the migration controls at Ellis Island when deciding whether to accept or refuse a candidate, which is the main focus of this article.

The article presents a close connection between migration legislation and passenger lists containing restrictive elements, through the use of selected cases over a range of years, where specific changes can be detected. In addition, the set of values a member of American society might possess based on a particular philosophy is emphasised, above all the importance of excellent physical and mental condition, as proved by the data of the Dillingham Commission. In particular we provide examples of misleading or incorrect data provided either by passengers or steamship companies, which in contrast to the Record of Aliens held for Special Inquiry also kept data on deported individuals. Passengers might have provided various types of misleading data, such as their political beliefs or the addresses of relatives, since these could not be checked immediately (Feys 2013). On the other hand, it is assumed that the fairness of the decision to exclude someone can hardly be viewed in detail without exploring the process of the interviews with the American commissioners. The discrepancy between the data provided by the passengers and the findings of the commissioners demonstrates the intensity of the desire to enter the USA and get a chance for a better life, whereas the lack of clarity with regard to the reasons for exclusion in certain cases raises the suspicion that the real power to decide who was worthy of being accepted and who was “likely to become a public charge” was based on the commissioners’ own attitudes and assumptions.

K N J I Ž N E O C E N Ě

B O O K R E V I E W S





## **Khaled A. Beydoun, *American Islamophobia: Understanding the Roots and Rise of Fear***

Oakland, California, University California Press, 2018

The purpose of this book, according to the author, is to provide general readers, students, and activists with a comprehensible introduction to Islamophobia. With this publication, Beydoun attempts to shed light on the phenomenon which has an international cluster of terms and phrases that include "anti-Muslim prejudice", "anti-Muslim bigotry", "intolerance against Muslims", "demonization of Islam", and "Muslimophobia". As a Muslim American law professor and a civil right activist, the writer hopes to give his readers a different perspective on Islamophobia. He bases his speculations on the chronological explanations of attitudes of American people due to certain events; discusses various court cases on granting American citizenship to Muslims; and discusses newspaper and TV news headlines as well as his own life experience. Last but not least, the author attempts to connect the old system of intolerance against Muslims to current policies and rival ideologies.

The book was written during a period of high interest in research of Islamophobia, and expanded the author's field of study. References to works by Edward Said, Samuel Huntington, Evelyn Alsultany, Kambiz Ghanea Bassiri and other scholars show the depth of the author's concern for and the scope of his study of the issue. The author highlights seven essential points relating to the topic, which he presents in the seven chapters of his book.

In Chapter One – What is Islamophobia?, Beydoun discusses the beginning of modern Islamophobic fear and the nation's expectations of its leaders in combating that fear. The election of Trump and his continuing "fully-fledged anti-Muslim campaign" reflect and consolidate what the majority of the population supports these days (p. 30). The private reactions of American people towards American Muslims, who have a "Muslim look" by covering their heads with headscarves or wearing a beard, are reviewed in this chapter. The reactions include the murder of Muslim students, armed and unarmed anti-Muslim protests in various states, the vandalization of mosques, etc. Apart from the attacks on Muslims, one can be quite surprised when reading the book to realize how easily and impulsively similar looking people have been victimized.

In Chapter Two – The Roots of Modern Islamophobia, the author examines cases where Muslims were barred from receiving American citizenship and considered to be "unassimilable within American values and society" (p. 46). Beydoun references authors who have mentioned the clash of Western and Eastern ideologies. The phrase "Islam was everything the West was not ..." (p. 51) sounds just like what Edward Said once wrote in *Orientalism* (1978).

Those who wish to get closer to the events which besmirched the reputation of the Muslim community in the US can turn to Chapter Three – A Reoriented "Clash of Civilizations". It discusses the case in the state of Oklahoma where a born-and-bred

Catholic citizen of the United States executed an attack. Although the media habitually blamed Muslims for being involved in terror, this case turned out to be an exception. This one and only exception could not improve their reputation, which was ultimately “undermined” on the 11th of September 2001.

Chapter Four – War on Terror, War on Muslims continues the discussion of the polarization of the nation in the US. The line between the poles was drawn by Bush’s phrase “You are either with us or against us” (p. 119). The president addressed Muslim Americans, warning about the consequences of being “bad Muslims”. Several years later, President Obama shared similar ideas, saying that Muslims are responsible for keeping Muslims communities “clean” from extremist ideologies (p. 119), even while Obama’s Arab/Muslim identity gave great support to some American Muslims. Another division of Muslims in America discussed in this part is “good Muslims” and “bad Muslims”. “Good Muslims” are those who limit their religious affiliation. “Bad Muslims” are those who freely exercise their faith and end up being suspected of terrorism. The author supports his arguments with autobiographical memoirs of his student life. Having a Shiite father from Lebanon and a Sunni mother from Egypt resulted in a marginalized identity. However, Beydoun found power in being in the margins.

Chapter Five – A “Radical” or Imagined Threat? narrates stories of people who brought some changes into their lifestyle (keeping a beard by young men or fasting during Ramadan, etc.). The changes caused suspicion and prejudice-driven fear that this kind of “radicalization” among the younger generation might induce terrorism. Therefore, CVE (Countering Violent Extremism) policing turned its attention to so-called “homegrown radicals” and might-be “apprentices” of ISIS (Islamic State of Iraq and Syria) or other Islamic transnational terror networks. Thus, any Sunni Muslim was considered to be vulnerable to radicalization, and accordingly radical or imagined subject to the surveillance of the state.

Chapter Six – Between Anti-Black Racism and Islamophobia is full of memoirs about the greatest Black Muslim American, Muhammad Ali. The author supports his attitude to the issue by saying “despite the heights Ali reached in sport, and the throne he claimed in the hearts and minds of everyone, the black Muslim experience and people he represented are still, today, marginalized and ignored” (p. 154). The reader can conclude that African American Muslims and non-black Muslim individuals are in the same boat, “created” by Islamophobia.

In the final part, in Chapter Seven – The Fire Next Time, Beydoun introduces us to another victimized group, LGBTQ Muslims. As can be expected, this minority group also fights for its “share of the limelight” in the US. However, there are some people whose minds were struck by the unimaginable integration of Islam and homosexuality.

Although Beydoun offers readers a solid analysis of the political and social history of Islamophobia in American society, and his insights are applicable to a broad spectrum of other western societies, his book falls short of showing some kind of support of the American people. These people have witnessed terrorist attacks by

extremist groups, sometimes developing a phobia of going to public places, and sometimes experienced the loss of their loved ones during the attacks. Moreover, the media has presented faces with beards as nothing but negative. These foreign looks and “modern threats” are posed by a culture which is different, as we all know from the books of Huntington and Said, to the “host” society.

How could you prove that the associations American people have recently obtained of Muslims with extremism, Muslims with terrorism, and Muslims with gender inequality did not originate after Muslim/Islamic immigration to the US? Could it not be after 9/11?

A thorough consideration of an issue necessitates a balanced approach. Therefore, the book is unapproachable in a balanced fashion and does not consider the issues experienced by the mainstream community along with the issues faced by Muslim Americans in the framework of this “clash of cultures”.

Furthermore, the author includes the following assertion: “I found myself wedged between the hate and its intended victims. Muslim Americans like myself were presumptive terrorists, not citizens; unassimilable aliens, not Americans; and the speeches I delivered on campuses and in community centers, to Muslims and non-Muslims, cautioned that the dangers Islamophobia posed yesterday were poised to become even more perilous today” (p. 13). It may seem to contain a little bias regarding the narratives of the events concerning Islamophobia in this book. The latter is naturally understandable due to some dramatic events and brutal ends some Muslims American met while living in the US.

*American Islamophobia* contains a critique of western society’s reaction towards Muslim American, Black Muslim, and LGBTQ Muslims. The issue faced by Muslim Americans is called scapegoating, hostility, hate crimes and even a war against Islam (p. 179). Unfortunately, it is a story about a minority who went to the West to establish a foothold but were opposed by the majority which has its own culture and rules of life. Muslim people make up a minority who fight for their rights and cultural peculiarities to be exercised in their full sense in a different land, which has its own history and peculiarities of being a “melting pot” or a “salad bowl” – assimilation of various cultures and having as a result a culture which favours gender equality and freedom. If we imagine the situation other way round – American people living in the Middle East, this surely would not be a case of “smooth” assimilation but would cause similar debates between the majority and minority cultures.

Despite some minor weaknesses, the book makes a great contribution to current American studies and Islamic studies in general. By exploring the association between Muslim Americans and marginalized minorities and tracking the policies addressed to migrants in the US, Beydoun cleverly underpins his sharp analysis with a detailed discussion of ethnicity issues under the administration of different US presidents. In particular, a focus on Muslim issues that are “unassimilable and irreconcilable with American identity” is found throughout. What Beydoun has managed to achieve is to usefully explore, analyse and conceptualize the issues relating to the carrying out

of policies in this area. The book is easy to read and can be called a page-turner, with a detailed autobiography, authentic references, and congruent case study material.

Gaziza Tolesh

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

## 1. Usmeritev revije

Revija *Dve domovini / Two Homelands* je namenjena objavi znanstvenih in strokovnih člankov, poročil, razmišljanj in knjižnih ocen s področja humanističnih in družboslovnih disciplin, ki obravnavajo različne vidike migracij in z njimi povezane pojave. Revija, ki izhaja od leta 1990, je večdisciplinarna in večjezična. Dve številki letno v tiskani in elektronski obliki izideta na svetovnem spletu (<http://twohomelands.zrc-sazu.si/>).

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

## 2. Sestavine prispevkov

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

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

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

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

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

### 3. Citiranje

Avtorji naj pri citiranju med besedilom upoštevajo naslednja navodila:

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

### 4. Grafične in slikovne priloge

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

# INSTRUCTIONS TO AUTHORS PREPARING ARTICLES FOR PUBLICATION IN “DVE DOMOVINI / TWO HOMELANDS”

## 1. Editorial content

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

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

## 2. Elements

**Articles** should contain the following elements in the order given:

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

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

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

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

### 3. Quotations in articles

- Long quotations (four lines or more) should be typed as an indented paragraph (using the "tab" key), without quotation marks, the first line of the paragraph after the quotation should not be indented; quotations shorter than four lines should be included in the main text and separated with quotation marks, in normal font (not italic).
- When citing an author in brackets use the following form: (Anderson 2003: 91–99); when citing several authors separate their names with a semicolon and cite them according to the year of publication in ascending order (Milharčič Hladnik 2009: 15; Vah Jevšnik, Lukšič Hacin 2011: 251–253).
- A list of references should be placed at the end of the text and arranged in alphabetical order according to the author's surname. The list of references should include only cited sources and literature. Multiple references by one author should be arranged according to the year of publication. Multiple references by one author published in the same year should be separated with lower-case letters (e.g. Ford 1999a; 1999b).
  - a) Books:

Anderson, Benedict (1995). *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. London, New York: Verso.
  - b) Articles in a series:

Milharčič Hladnik, Mirjam (2009). Naša varuška. *Krila migracij: Po meri življenjskih zgodb* (eds. Mirjam Milharčič Hladnik, Jernej Mlekuž). Ljubljana: Založba ZRC, ZRC SAZU, 15–20.
  - c) Articles in journals:

Vah Jevšnik, Mojca, Lukšič Hacin, Marina (2001). Theorising Immigrant/Ethnic Entrepreneurship in the Context of Welfare States. *Migracijske i etničke teme* 27/2, 249–261. All major elements of English book and article titles should be capitalized (except conjunctions and prepositions shorter than five letters).
  - d) Internet sources:
    - Becker, Howard (2003). *New Directions in the Sociology of Art*, <http://home.earthlink.net/~hsbecker/newdirections.htm> (1 Feb. 2008).
    - *Interaction: Some Ideas*, <http://home.earthlink.net/interaction.htm> (1 Feb. 2008).

### 4. Graphics and illustrations

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



DVE DOMOVINI • TWO HOMELANDS  
Razprave o izseljenstvu • Migration Studies  
50 • 2019

**TEMATSKI SKLOP / THEMATIC SECTION**

**ŽENSKÉ V MISIJONIH: MED SLOVENIJO IN INDIJO /  
WOMEN IN THE MISSIONS: BETWEEN SLOVENIA AND INDIA**

*Ana Jelnikar*

Slovene Women Missionaries in India: Contexts, Methods and Considerations

*Irena Avsenik Nabergoj*

The Mission of the Church in Dialogue with Non-Christian Religions

*Helena Motoh*

"Our Bengal Mission": Negotiation of National and Transnational Agendas by Interwar Yugoslav Missionaries in Bengal

*Tamara Ditrich*

Female Renouncers in India: A Neglected Chapter in the History of Indian Religions

*Benjamin Zachariah*

The Tongue is Mightier than the Printing Press? Reflections on the Production of Oral Histories and on Languages of Legitimation

*Nataša Rogelja Caf*

A Life in Letters: An Anthropological Reflection on the Correspondence of Slovene Missionary sr. Conradina Resnik

**ČLANKI / ARTICLES**

*Francesco della Puppa*

Transnational Families and Migrant Masculinities: The Social Institution of Male Adulthood and Family Reunification in the Bangladeshi Diaspora in Italy

*Duška Knežević Hočevar, Sanja Cukut Krilič*

Contestable Demographic Reasoning Regarding Labour Mobility and Migration

*Lev Centrih*

»Maribor ob morju«: Zveza komunistov Slovenije in vprašanje poselitve Koprškega okraja v letih 1945–1965

*Jernej Mlekuž*

Nadzor nad nenadzorovanimi migracijami: Kako je slovensko časopisje pisalo o prebegih iz Jugoslavije v letih 1945–1965

*Marina Lukšič Hacin*

Političnost migracij po drugi svetovni vojni: Od politike revanšizma do amnestije

*Marjan Smrke*

Religioznost in velikodušnost do migrantov

*Maja Gostič*

Izkušnje bivanja in dela sodobnih slovenskih izseljencev v Avstriji in Nemčiji

*Lucia Kulihova*

Zavajajoči podatki na seznamih ladijskih potnikov kot posledica restriktivne ameriške migracijske zakonodaje

**KNJIŽNE OCENE / BOOK REVIEW**

Khaled A. Beydoun, *American Islamophobia: Understanding the Roots and Rise of Fear* (Gaziza Tolesh)

ISSN 0353-6777



9 770353 677013

ISSN 1581-1212