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TWO
homelands
MIGRATION STUDIES

59 • 2024

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TEMATSKI SKLOP

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LABOR MIGRATION IN UKRAINE AND THE POST-SOVIET SPACE

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The migration movement of the population to other countries is often due to the presence of a high quantity of labor potential that is not in demand in the domestic labor market. Labor migration is currently one of the largest migrations worldwide (Sabluk, 2021). The globalization processes taking place worldwide coupled with each country's economic, political, domestic, and national issues, are among the factors contributing to this high level of migration. After post-Soviet countries gained independence, their citizens could travel to other countries, particularly for employment. Increased labor migration to other countries was noticed in Ukraine, especially after the start of hostilities in the country's east (Babets & Ruda, 2020; Kadriu, 2023).

This themed section of *Dve domovini / Two Homelands* illuminates significant contemporary migration and labor migration trends in the post-Soviet space. Ukraine has experienced substantial emigration in recent decades, spurred by economic uncertainties and the conflict in eastern Ukraine since 2014. Labor migration is a major phenomenon, partly facilitated by Ukraine's visa-free access to the EU, which provides more opportunities for temporary work abroad (Kortukova, 2021). However, large-scale emigration of working-age Ukrainians poses risks of "brain drain" and other socioeconomic impacts (Spanger & Andersen, 2023). Kazakhstan has also seen substantial emigration and immigration, mainly to and from neighboring countries like Russia and Uzbekistan, for economic reasons. Newly restrictive residence permit regulations in Kazakhstan may alter these longstanding migration dynamics within the region. Japan is gradually easing some of its previously strict immigration policies to fill acute labor shortages in the construction, home healthcare, and agriculture sectors. However, tensions remain around the integration of migrants into Japanese society. Public attitudes do not always align with government efforts to accept more foreign workers (Liu, 2023). Meanwhile, many Tajiks engage in temporary cyclical labor migration to Kazakhstan, working in trade sectors like markets or transportation. Their collective family-based migrant enterprises demonstrate resilience in the face of challenging conditions, though restrictive and unpredictable migration policies in Kazakhstan create precarity.

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Complex economic, social, political, and demographic drivers shape migration patterns and experiences in the region. These countries address migration management through evolving legal frameworks to ensure migrant rights and sustainable development. The multifaceted factors influencing migration decisions and migrants' lives resist straightforward policy solutions (Merho, 2019). More research and policy dialogue are needed to develop holistic, evidence-based approaches.

Thus, this themed section aims to provide diverse scholarly perspectives on labor migration patterns in Ukraine and neighboring countries, highlighting migrants' lived experiences and policy frameworks shaping the evolving regional migration system. The section contains six articles that raise and try to answer important questions. Marusiak et al. provide a critical analysis of the drivers of labor migration, specifically relating to education reforms, and examine broad trends and impacts of labor migration. Their paper outlines relevant sociological theories related to the social functions of education and its transformation, including from Durkheim, Weber, and Parsons. A comprehensive historical overview of migration periods in Ukraine, focusing on identifying the drivers and nature of each period, is provided. It discusses how issues like the transition to distance learning and homeschooling may relate to emigration attitudes and draws meaningful connections between educational reforms, quality, and labor migration trends.

"Social-Economic Integration of Kazakh Migrants in Turkey" and "Ethnic Entrepreneurship of Tajik Migrants: Strategies for Running a Family Business (on the Example of the 'Green Bazaar' in Almaty)" provide insights into the lived experiences of migrants and their economic and social integration. Abuova et al. examine the integration experiences of the Kazakh diaspora community and provide historical context on the migration of Kazakhs from Xinjiang to Turkey, outlining the key factors driving their exodus. The high mortality rate highlights the journey and hardships the migrants face. The Kazakhs' economic integration into Turkish society via leatherwork and manufacturing shows their adaptability. In contrast, Imasheva provides an in-depth look at Tajik migrant entrepreneurs in Kazakhstan, highlighting the collective family business strategies. The author outlines the historical context and prior research on post-Soviet Tajik migration patterns and experiences. Examining the collective, family-based nature of many migrant enterprises showed their resilience and shed light on an important migrant community. This manuscript makes a solid contribution to the section's theme by delving into the integration experiences of a key migrant group.

Most articles also relate to migration policies, laws, and rights in various contexts. Yaroshenko et al. provide a timely comparative analysis of migrant rights in Ukraine versus other European nations (Poland, Germany, and the Czech Republic) during the war. Their article discusses the concrete issues internally displaced persons (IDPs) face, like access to housing, employment, and education. Statistical data on migration since 2014 helps frame the issue and current crisis. Tables/charts help visualize the data. Adilgazinova et al. offer an interesting examination

of contemporary immigration policies and migrant adaptation in Japan, providing an insightful comparative perspective. The authors describe the structure and roles of key immigration institutions in Japan. They also discuss the relevant economic factors driving demand for migrant labor in Japan, such as labor shortages in specific sectors, and cover social security, health insurance, and education regarding migrant experiences in Japan. Finally, Kappassova et al. broadly examine overall migration patterns, issues, and policy implications in Kazakhstan, outlining relevant historical migration periods and contemporary data. The conceptual framework from the UN distinguishing different categories of migrants is helpful for analysis. Discussion of recent scholarly perspectives on migration governance and policy effects adds useful theoretical grounding.

While each country grapples with unique dynamics, several common threads emerge. Economic uncertainties, conflicts, and demographic pressures drive high levels of both emigration and immigration in the region (Pityulych & Hoblyk, 2020; Chernobay et al., 2021). Migrants seek improved livelihoods and opportunities abroad, yet often face integration barriers and precarious legal status. Restrictive policies attempt to curb migration but frequently fail to address underlying structural causes or protect migrants' rights. These complex challenges resist simple solutions. As demonstrated by the articles' diverse methodologies—from legal analysis to qualitative interviews—understanding contemporary regional migration requires examining it from multiple academic vantage points and centering on migrants' voices. This themed column provides a stepping stone to more nuanced perspectives and policy dialogues. Key priorities include developing evidence-based, humane approaches to managing migration, ensuring education access and labor rights for migrants, and facilitating social integration. As migration transforms communities and reshapes the post-Soviet space, inclusive policies that promote development for all represent the path forward. Much work remains, but constructive responses can emerge through insightful scholarly contributions and shared commitment to human dignity.

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MIGRATION ABROAD AS A SOCIAL CONSEQUENCE OF TRANSFORMATIONS OF THE INSTITUTE OF EDUCATION IN MODERN UKRAINE

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ABSTRACT
Migration Abroad as a Social Consequence of Transformations of the Institute of Education in Modern Ukraine
This study provides an original qualitative analysis of how contemporary labor migration trends shape and interact with Ukraine's education system. While extensive research analyzes the economic and political impacts of Ukrainian migration, few studies examine its influence on domestic educational processes. Thus, this study helps fill this gap through the in-depth examination of migrants' motivations, particularly the desire to finance quality education for children. By elucidating these understudied connections, the study aims to inform education policies and partnerships that leverage migration's developmental potential while mitigating the risks of brain drain.
KEYWORDS: migration, demography of Ukraine, educational institutions, sociological factors of resettlement, sociography

IZVLEČEK
Migracije v tujino kot družbena posledica preoblikovanja izobraževalnega sistema v sodobni Ukrajini
Avtorji v prispevku predstavijo izvirno kvalitativno analizo vpliva sodobnih trendov na področju delovnih migracij na izobraževalni sistem v Ukrajini. Medtem ko so gospodarski in politični vplivi ukrajinskih migracij predmet analize številnih raziskav, jih le malo proučuje njihov vpliv na izobraževalne procese v državi. Ta študija s podrobno analizo motivov migrantov, zlasti njihove želje po financiranju kakovostnega izobraževanja za svoje otroke, zapolnjujejo to vrzel. Avtorji si z osvetlitvijo teh premalo raziskanih povezave želijo prispevati k izobraževalnim politikam in partnerstvom, ki bodo izkoriščali razvojni potencial migracij in hkrati zmanjšali tveganje bega možganov.
KLJUČNE BESEDE: migracije, demografija Ukrajine, izobraževalne ustanove, sociološki dejavniki preseljevanja, sociografija

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INTRODUCTION

The current education system is undergoing reform and transformation since its traditionalism cannot fulfill the diverse requirements of a rapidly changing society. A significant volume of regularly updated information, as well as the necessity for flexibility and the capability to organize time effectively, are required by learners. They must be able to identify and prioritize essential information, analyze datasets to derive practical solutions to problems, and possess certain skills known as "soft" or "soft skills." As a result, implementing new educational forms and technologies is required to enhance the overall standard of education. In 2020, the global pandemic posed significant challenges that required urgent attention. Schools and higher education institutions had to quickly adjust to the situation and implement new educational technologies to ensure the continuous delivery of education (Miethlich et al., 2021). As a result, remote learning became a new reality for students, teachers, and schoolchildren alike. Notably, this form is typical of many universities in other countries, but it has not yet been widely adopted in Ukraine (Yermakova, 2015, pp. 96–99; Onishchenko, 2020).

The authors agree with I. S. Nechitailo (2015) that the readiness of Ukrainian education for a new era (postmodern), for the transition to a new society (knowledge), is determined by its ability to become a reliable basis for the development of a humane personality with developed critical thinking, creative potential, freely oriented in multi-vector information flows; able to "catch" from these flows the most important and reliable facts; able to transform these facts into knowledge and apply this knowledge in practice for the benefit not only of oneself but also of others and society as a whole. At the state level, particularly on the government portal, it is stated that Ukrainian education today does not meet the modern needs of the individual and society, the needs of the economy, or global trends. Therefore, the systemic transformation of the educational sphere has begun. In schools, the main directions of change are the development of twenty-first-century competencies (general cultural and environmental competence, entrepreneurship and innovation, critical and systematic thinking, creativity, initiative, ability to constructively manage emotions), in vocational education—the involvement of employers and increasing the share of internships in the educational process, in higher education— the improvement of quality, ensuring academic integrity (Berkimbaev et al., 2012; Education and Science Reform, 2021).

The Ukrainian science and research system faces monumental challenges due to Russia's invasion, with significant numbers of scientists having fled the country, according to estimates by the OECD (2022). However, the OECD analysis also highlights opportunities to strengthen partnerships between Ukrainian scientists and foreign institutions in ways that could support Ukraine's post-war recovery. As the OECD report concludes, policy measures to support refugee Ukrainian scientists should aim to facilitate their eventual return and the forging of sustainable

partnerships between Ukrainian and foreign research institutions. The report stresses the need for "genuine brain circulation" rather than brain drain. It also emphasizes the potential for digital tools and open-access resources to enable continued remote research collaboration involving scientists within Ukraine.

Globalization and the free movement of people between countries have led to increasing labor migration, including from Ukraine (Yemelianova & Tereshchenko, 2020, pp. 6–12). In their recent article, these researchers analyze the phenomenon of Ukrainian labor migration, noting that millions of Ukrainians now work abroad, making up one of the largest migrant groups in Europe. The authors find that the average age of migrants has dropped, with most now aged 30–44 and over a third holding higher education degrees. The authors highlight that young Ukrainians are also getting accustomed to migration, increasingly traveling abroad for education. The authors argue that this growing educational migration is becoming the first stage of labor migration and that uncontrolled emigration of students risks imbalances in Ukrainian society. Therefore, they argue that educational migration needs greater oversight from authorities and civil society. In summary, the article provides an important analysis of the drivers and risks of Ukrainian labor migration in the era of globalization.

In May–June 2018, the state research institution Institute for Education Content Modernization (IECM) conducted an online survey among teachers, employees, and administrators of general secondary education institutions on the topic: "Educational reform from within: the educators' point of view." A third of respondents (32%) describe the state of school education as "chaos," while the other two-thirds describe it as "stagnation," "decline," or "crisis." However, the remaining representatives of general secondary education institutions are convinced that the system is "flourishing," "rising," or "coming out of the crisis." According to the respondents, the most serious problems in education that need to be solved in the next five to ten years are the logistics of educational institutions (83% of respondents), salaries of teachers (47%), and motivation of students to acquire knowledge (45%) (Results of the online survey, 2018). The social aspects of the functioning of education are considered in the works of classic sociologists E. Durkheim (1961), M. Weber (2018), T. Parsons (1971), and others. E. Durkheim emphasized the role of education in creating and maintaining social solidarity by transmitting cultural knowledge, norms, and values to future generations. He believed that schools should focus not only on teaching academic subjects but also on inculcating moral values in students. M. Weber believed the modern education system was a product of rationalization, the process of applying rational and efficient principles to various aspects of society. He argued that education played a significant role in perpetuating social inequality by providing differential access to education based on an individual's social class. T. Parsons saw education as a key agent of socialization, preparing individuals for their societal roles and teaching them the norms and values of their culture.

Modern Ukrainian researchers have also studied this question. In the work of I. Nechitailo (2015), the social aspects of the functioning of education are considered, which relate to the impact of education on society as a whole, the change of values and identity of a person, and the development of civil society. T. Yermakova (2015, pp. 96–99) considers education a social phenomenon and finds out how it affects social processes. E. V. Astakhova (2000, pp. 7–12) analyzes the social aspects of the functioning of education, including its role in forming human capital, improving social mobility, and increasing the economic competitiveness of society as a whole. In the work of S. Shchudlo (2012), attention is drawn to the socioeconomic problems of higher education, particularly financing and the effectiveness of spending money on education. Kozlovska (2008, pp. 13–20) examines the social and economic aspects of access to education for different social groups, including issues of state funding, investment in education, and scholarship policy. L. M. Khyzhnyak and K. V. Khyzhnyak (Khyzhnyak & Khyzhnyak 2016, pp. 137–144) draw attention to the social consequences of the hybridization of higher education, in particular the changing roles of teachers and students, the impact of electronic education on students' health, and the socioeconomic consequences of the introduction of such technologies.

This article was written before the war in Ukraine and, therefore, reflects the pre-war situation and recommendations. It is important to acknowledge that the ongoing conflict has had a significant impact on the education system in Ukraine, and, as a result, the current situation and recommendations for improving the system are likely to be different. Nevertheless, this article provides valuable insights into the social aspects of education that remain relevant even in times of crisis.

This study aims to provide a qualitative analysis of how contemporary labor migration trends from Ukraine shape and interact with the country's education system.

METHODOLOGY

This study uses a qualitative approach to provide an in-depth analysis of the causes and consequences of contemporary labor migration in Ukraine and how educational reforms and sociocultural factors influence these migration processes. The main research methods include literature review, secondary data analysis, sociohistorical analysis, descriptive analysis, content analysis, and comparative analysis.

The literature review synthesizes and critically examines previous theoretical perspectives and empirical studies relevant to the research objectives. This includes both classic sociological theory and contemporary scholarship by Ukrainian researchers on relevant topics such as the social impact of education, socioeconomic issues in higher education, access to education, and the impact of technology and globalization.

Quantitative secondary data from Ukrainian government sources, including migration statistics and education indicators, are analyzed to provide context on the scope and trends related to the research focus. The limitations of relying solely on official data are highlighted. A sociohistorical approach traces the course of the four main periods of migration from Ukraine from the late nineteenth century to the present. Scholarly historical accounts, archives, and demographic data are used to analyze each period's timing, causes, size, and composition.

The contemporary situation is richly described, particularly the predominance of economic motivations driving the fourth period, which began after Ukraine's independence in 1991. Content analysis of Ukrainian legislation, government reports, and academic studies provides context. Thematic analysis of secondary sources highlights the provision of quality education as a primary reason cited by contemporary Ukrainian labor migrants.

Comparative techniques contrast different periods, demographics, regions, and forms of migration to identify important patterns and variations. The study concludes that despite extensive research on the impact of migration in areas such as the economy and politics, there remains a gap regarding its specific impact on Ukraine's educational processes. Given the priority that migrants place on financing quality education, further research is warranted.

THEORETICAL PRINCIPLES OF RESEARCH

Transformation is a method of changing the form, appearance, nature, or character of a social or individual structure. Transformation does not involve a vector of change; it can be both progressive and regressive. The main thing is the transformation of the forms and content of social life, the institutional sphere, norms, values, mentality, and other sociocultural aspects of society (Podolska, 2009). The transformation of education as a social institution is a process of changing all its components, which takes place under the influence of social demands, economic and technical innovations, political reforms, and sociocultural transformations. The ability of education to effectively fulfill its social functions is only possible if it responds to public interests and needs. Durkheim (1996), in his writings, argued that education depends on the specific historical conditions of social development; socioeconomic changes in society lead to changes in education, and the purpose of education is to develop the physical, intellectual, and moral qualities of the individual that society requires of him. Education as a social institution is a sustainable form of organization of social life and joint activities of individuals, which includes a set of individuals and institutions endowed with power and material resources (based on certain norms, rules, and principles) to implement social functions and roles, management, and social control in the process of training, education, development, socialization of the

individual with the subsequent mastery of his profession, specialty, qualifications (Yermakova, 2015, pp. 96–99).

One of today's requirements is continuous education or lifelong learning. This is because the knowledge society and its dynamics require individuals to improve themselves constantly to compete in the labor market. In this sense, the need for professional development and self-education is relevant. This can be formal education (in an educational institution with a diploma) or training, seminars, and courses. It should be noted that the principle of continuity of education, regardless of age, social status, or profession, has long been supported by highly developed countries (Komilova et al., 2019). In particular, as noted by Kozlovska (2008, pp. 13–20), the basis of the continuing education program in its European and US editions is the focus on the development of the individual and the universal provision of this development by removing age, social, and organizational constraints. Educational institutions as subjects of providing educational services should be transformed and provide opportunities for everyone to choose the form and content of acquiring new knowledge and skills.

The objectives of education and its content are also changing, which in turn requires new teaching methods and forms, updating training programs for teachers and pupils (students), and evaluating the results of their learning. In response to the demands of the labor market and stakeholders, the new educational paradigm tends to favor so-called soft skills (Sandra et al., 2022). They go beyond cognitive knowledge and help to increase competitiveness in the global labor market in terms of its computerization, automation, and the introduction of new technologies. Becoming a skilled professional, a leader, requires not only a certain amount of learned information but also emotional intelligence. It consists of finding solutions in a stressful or conflictual situation, initiative, organization, sociability, empathy, adapting quickly to change, and working in a team (Kurmanov, 2023).

THE IMPACT OF THE QUALITY OF THE EDUCATION SECTOR ON THE VOLUME OF LABOR MIGRATION

Quality assurance is one of the most important societal demands on the entire education system. This category is multifaceted and complex. The quality of education is, first of all, the ability of this institution to fulfill its social functions, to meet the requirements of all participants, society as a whole, and the needs of the time. The quality of education comprises several qualitative characteristics: teaching staff, programs and methods, learning outcomes, infrastructure, and logistics. According to a survey conducted by the Razumkov Centre and the Ilko Kucheriv Democratic Initiatives Foundation in July 2020, most Ukrainians assess the quality of school education in Ukraine as average (44.5%) and another 10% as positive. A third consider it very low (11%) or rather low (22%). At the same time, most Ukrainians

agree that improving the quality of secondary education in Ukraine is important. Of the respondents, 34% consider it one of the priority issues; another 48% noted the importance of this problem but believe that Ukraine faces more serious challenges (EDUCATION AND THE PANDEMIC, 2020).

One of the mechanisms aimed at improving the quality of education and overcoming dysfunctions in the system is the introduction of external independent evaluation in 2004. This is a set of organizational procedures (mainly tests) to determine secondary school graduates' academic achievement levels when they enter higher education institutions. The positive effect of introducing external evaluation is to improve the quality of graduates' knowledge, reduce corruption in institutions, and create conditions for equal access to education for all, closer to European standards. It should be noted that not everyone recognizes these positive changes. According to a sociological survey, 70% of citizens believe that the external independent evaluation has put all applicants on an equal footing, and 60% agree that the external independent evaluation has reduced corruption in admissions (EDUCATION AND THE PANDEMIC, 2020). In today's conditions, the problem of the introduction of distance education, online education, and e-education in modern Ukrainian society is relevant. It is widely discussed in media, politics, social networks, and scientific discourse. Distance education has its advantages and disadvantages. Among the positive aspects are:

- convenience and mobility for participants (learning at any time, in a convenient place, without travel costs);
- flexibility and individual approach (possibility to adjust the teaching process—learning considering the characteristics of the student or group);
- economic efficiency;
- innovation (possibility of introducing new pedagogical methods and technologies, modernization of all processes).

Among the negative aspects are:

- the need for constant access to the Internet;
- difficulties in communication between student and teacher;
- the need to involve parents of students in the organization of the educational process;
- lack of live communication within the group, which complicates the organization of group work;
- the need to train teachers to use information technology;
- insufficient control of the acquisition of knowledge.

Certain institutional, sociocultural, and personal barriers that slow down the implementation of fully-fledged distance education in Ukraine are worth mentioning. Such factors include the imperfection of legislation in this area, certain social stereotypes and norms in the field of education, and the unwillingness of teachers to play a new

role in the virtual environment, which requires not only knowledge of the subject but also mastery of information and communication technologies (Miethlich, 2022). The transition to new forms of education (including distance education) requires restructuring the teacher training system, modernizing institutions' material and technical base, and revising methods of organizing the educational process in general (at macro and micro levels). The demand for distance education in modern society can be traced back to the introduction of quarantine (Periokaite & Dobrovolskiene, 2021). Homeschooling is a specific form of schooling that is gaining popularity, i.e., teaching children at home under the supervision of parents or relatives, sometimes with the involvement of teachers. This is done according to an individual plan and timetable, without grades. The main purpose of such education is to develop the student's internal motivation to acquire knowledge. This form of education has its advantages and disadvantages, but its growing popularity in Ukraine may indicate certain shortcomings in traditional school education.

One of the most important aspects of distance learning that makes it effective is the high level of motivation of both teachers and learners. During the quarantine, the participants in the educational process were practically not ready to conduct classes at a distance, which probably affected the quality of education in general (Sandra & Aritonang, 2021). Finding out the difficulties that arose and the level of motivation and satisfaction can be one of the areas of empirical sociological research in this field. The website zn.ua contains survey data with reference to the Educational Agency of Kyiv, which was conducted among students, their parents, and teachers in the capital (thirty-four thousand respondents) by electronic questionnaire in two stages: in early April and the first week of May. It was found that the main problem with distance learning is the inability to understand the quality of educational material. This was mentioned by 48% of parents and 46% of students. Moreover, the number of such respondents increased by almost 20% in the study's second phase. Half of the teachers surveyed believe that the main difficulty of distance learning is the inability to control how students learn the material. At the same time, 18% of teachers complained that they could not determine their students' achievement levels. Other challenges for teachers were technical problems (38%), communication with students (41%), and lack of experience in distance learning (37%) (Onishchenko, 2020).

The further continuation of the school process online has caused considerable resonance in social networks and media; clashes of different points of view create conflicts and increase social tensions among the population. The transformation of the educational process leads to the implementation of blended learning, that is, a combination of face-to-face and distance learning. An integrated approach (including the participation of the public, experts, and sociologists) is important because transitioning to such a concept in education means transforming all its components as a social institution (actors and their roles, social norms governing their behavior, functions). Khyzhnyak & Khyzhnyak (2016, pp. 137–144) note that the search for

a new model of higher education is underway, which is explained by the need to ensure the sustainable development of education in an unstable world in turbulent social relations, which extends to educational practices. At the same time, the transition of higher education to the information base takes place in the process of hybridization of the educational model. However, educational hybrids are difficult to fit into the existing management model of higher education. New social control and motivation systems for both teachers' professional activity and motivation to teach students are needed.

LABOR MIGRATION AS A FACTOR IN THE DEVELOPMENT OF EDUCATIONAL PROCESSES

The next step in the work is to consider migration as one of the factors influencing educational processes. The processes of labor migration in the territory of Ukraine have not always been of the same intensity and nature. Today, Ukrainian researchers of migration processes in Ukraine distinguish four periods: the first—the end of the nineteenth to the beginning of the twentieth century; the second—during World War I (so-called labor); the third—between the two world wars (mostly political); the fourth—after World War II (political, displaced persons). The collapse of the Union of Soviet Socialist Republics (USSR) led to the fourth period of migration in Ukraine, which continues today. At the beginning of the 1990s, significant changes occurred, particularly in the intensity, direction, and nature of external migration of the Ukrainian population (Uehling, 2004, pp. 77–109). It is worth mentioning the work of such Ukrainian historians as S. Kacharaba and M. Rozhyk (Kacharaba & Rozhyk, 1995), who note that "the main source of Ukrainian immigration to Western Europe and America were immigrants from Western Ukraine who were forced to leave their homeland in the late nineteenth and early twentieth centuries [...]." This was the beginning of the first period of Ukrainian emigration, which was conditioned by certain factors: socioeconomic, sociopolitical, spiritual, and cultural. As a result, the first period of Ukrainian migration resulted in hundreds of thousands of Ukrainians moving to Russia, the United States, Canada, Brazil, Argentina, and European countries.

The second period of migration took place after the post-revolutionary events and the civil war of 1917–1921. Unlike the first period, the main contingent of migrants in this wave were representatives of the nobility, officials, intellectuals, hetmans, and officers who were forced to migrate for political reasons. One of the main reasons for the political migration of this stage was the defeat of the national liberation struggle in 1917–1921. Many of them tried to create a Ukrainian movement in exile. Among the emigrants were groups of highly educated people, specialists in various fields of economics, scientists, and writers. The countries chosen for emigration were Poland, Czechoslovakia, Romania, Austria, Bulgaria, Germany, and France. It should be noted

that the second period of migration also included the forced expulsion of one million Ukrainian migrants during collectivization in Siberia and the North in 1929–1930.

The political situation in Ukraine caused the third period. During this period, various segments of the population emigrated. Political and military leaders of the Ukrainian People's Republic, as well as many representatives of Ukrainian science, culture, etc., left the USSR. With the accession of Galicia to the USSR, the number of emigrants reached at least one hundred thousand people. Among the emigrants of this period were those who had been in IDP (internally displaced persons) camps during the war and who were afraid to return home from the western parts of Germany after the war in order not to be abandoned in concentration camps. In the United States alone, their number reached about eighty thousand. By 1944, more than three million Ukrainians in Hitler's Germany, including those evacuated to the West (excluding prisoners of war), had been deported to forced labor. A third of them were repatriated to the USSR in 1945–1948. Others were scattered all over the world. In 1953, there were only twenty thousand leftists in Germany and only five thousand in Austria. In Germany, five thousand Ukrainians had jobs and were integrated into the state economy. In Austria, there were only five hundred. This incomplete list is supplemented by another 2,128 Ukrainians (including 4,849 families) who lived on external assistance (Posmitna, 2020, pp. 31–39).

The collapse of the USSR led to the fourth period of migration in Ukraine, which continues to this day. In the early 1990s, the intensity, direction, and nature of external migration of the Ukrainian population underwent significant changes. The reasons (political, religious, ideological, etc.) and the nature of the migration changed. Labor migration in the Soviet Union was largely an internal "closed" phenomenon. It provided for intensive (voluntary and forced) labor movement within the country, which does not mean that the phenomenon of emigration was utterly absent in the USSR. However, cross-border migration was the exception rather than the rule and was isolated. Most USSR citizens did not go abroad on their own initiative but on the orders of the government (Voyvoda, 2022). These were military personnel serving abroad, specialists, highly skilled workers working in socialist and developing countries, and small groups of organized tourists. A separate group was Jewish emigrants. The Soviet authorities forcibly deported some dissidents. However, this group was an exception rather than a natural phenomenon of the period. There was a negative opinion about the majority of such migrants; they were labeled "traitors to the motherland" (Roskladka et al., 2020, pp. 70–81).

MIGRATION PROCESSES IN INDEPENDENT UKRAINE

After the declaration of independence, the number of emigrants to Ukraine increased sharply. The reasons for this were the fall of the Iron Curtain, the creation of an appropriate legal framework, a significant simplification of the mechanism for processing

travel documents, and the decline in living standards due to the economic crisis. After ill-conceived reforms in the early 1990s, most of the country's population lives below the poverty line. Rising unemployment, meager salaries, total delays in payment, lack of prospects for professional growth, economic instability, and insecurity of citizens have served and continue to serve as reasons for strong migration (Skydan et al., 2023). Even in the recent "pre-perestroika" past, the slightest hint of the unprofitability of the economy and low wages in the labor market were considered unacceptable in the country "where socialism triumphed," one of the main achievements of which was the absence of unemployment. Today, this problem has taken on a qualitatively different nature. It is impossible to reform economic relations without laying off workers and depriving them of their basic income and ability to provide for themselves and their families. Forced unemployment (or unemployment) in Ukraine, which accompanies market reforms, was particularly acute in the 1990s. However, it remains a pressing problem. Moreover, searching for an effective strategy for state regulation of employment in the country is still one of the most important national problems (Nikiforenko & Anh, 2021, pp. 5–18).

It should be noted that the fourth period of Ukrainian migration is qualitatively different from the first three. In particular, the main reason for migration in this period was economic, and the purpose of such migration was to improve the situation of one's family. There was also a change in family values and roles. However, this fourth period should be divided into two periods. The first is the period from the 1990s to the end of 2008 because, as sociological research shows, scholars mainly characterize this period as economic migration, as discussed above. Despite a short-term economic stabilization in Ukrainian society since around 2005, migrants are in no hurry to return. According to the State Statistical Committee, there was a partial decrease in migration processes at that time, but it did not last long. With the onset of a new economic crisis, labor migration is again increasing. Another reason is the internal transformation of the migrant worker's worldview and sociocultural needs (Patynska-Popeta & Zinchuk, 2022). The authors are interested in the latest period of migration because it continues today. Its representatives are actively involved in mixing the experiences gained in the donor and recipient countries (including the experience of international cooperation, which may include the updating/rethinking of various national stereotypes) (Dzyra, 2020, pp. 185–196).

An important development in the direction of the study of issues related to the emergence and development of labor migration of citizens of Ukraine was the monograph *Labor Migration of Citizens of Ukraine. White Book*, written by O. Khomra, M. Ozhevan, T. Petrova, V. Nagorny, O. Primak (Khomra et al., 2006). The work considers the historical, legal, socioeconomic, and sociopolitical aspects of migration processes. The authors analyze the positive and negative features of the fourth period of migration from the territory of Ukraine, the method of calculating migration patterns by quantitative and age characteristics. Economic migration is "the crossing of national or international borders in search of work, purchase or sale

of goods, investment and other activities that have economic goals or motives." The researcher J. Korczynska (2003) also classifies labor migration as economic. It is any movement of people whose purpose is to improve their material conditions. Economic migration includes most migrations in the modern world. Economic determinism in explaining the causes of all labor migration also limits the understanding of complex migration processes. The role of various sociocultural factors, including national stereotypes and prejudices, should also be considered, for example, when choosing the direction of migration.

Educational migration is an increasingly relevant issue facing Ukraine today. As Velychko & Yaremenko (2020, pp. 62–70) analyze in their article "The Phenomenon of Student Migration in Ukraine," the number of Ukrainian students pursuing education abroad has risen sharply in recent years, with over 60,000 Ukrainian students studying overseas as of 2015. The authors find that the key destinations for these students are Poland, Germany, and Russia, largely due to geographical and cultural proximity. Regression analysis shows that growth in international tourism has been the most significant factor influencing increases in student emigration from Ukraine. Velychko and Yaremenko highlight the implications of this growing trend, including potential brain drain and loss of human capital, as many students fail to return to Ukraine after completing their studies abroad. They propose policy measures to mitigate negative impacts, such as modernizing Ukraine's education system and enhancing cooperation between universities and students. While recognizing potential benefits, such as acquiring new knowledge, skills, and cultural experience, the authors emphasize the need for Ukraine to take urgent action to reduce the harmful effects of student emigration.

Labor migration is one of the types of migration undertaken by an individual to find a job (positive migration attitude to work), i.e., the movement of able-bodied persons for the purpose of employment, which may be permanent or temporary. By entering into the process of production of material goods and paid services as carriers of mental abilities, knowledge, and skills acquired through education and practical experience, etc., such persons become important factors of change in the labor market and, consequently, influence economic and social development (Bozorgmehr & Díaz, 2022). For any country, including Ukraine, the reduction of the labor force structure has a negative impact on socioeconomic development. However, labor migration not only helps to overcome the economic crisis but also gives a certain impetus to the further development of the country (Klochko & Issakova, 1993, pp. 405–409). The true extent of labor migration remains unknown, with different expert versions suggesting different figures. For a long time, due to the lack of statistics, various fabricators and politicians put the figure between five and seven million, and from around 2009 to 2013, between three and four million. In recent years, the poverty level in Ukraine has remained threatening, contrary to the expectations of economic change. According to the Main Statistics Office in Lviv Region, as of early 2021, migrant workers in this region comprise 15% of the

working population. The main countries of emigration for Lviv region residents remain Germany, the United States, Poland, the Czech Republic, and Spain. The highest level of migration movement in the Lviv region was observed in seven districts: Zhovkva, Kamianka-Buzka, Mykolaiv, Mosty, Peremyshlyany, Pustomyty, and Yavoriv. Therefore, choosing a place to conduct in-depth interviews, the authors stopped at the inhabitants of the Mykolaiv area.

An explanation for this trend can be found in the semi-structured interviews, where respondents mentioned family, taking care of the family, and children among the main motivations for labor migration: "I have a family, I had to think about how to clothe them, what to feed the children tomorrow." "And what is here? Here, I would never be able to provide my family with everything I need, and the children have grown up, the needs have increased every year." The family's needs in terms of financial well-being, higher education for the children, and buying a house are the most important. Ukrainian citizens emigrate abroad for the following reasons: economic, personal, socio-professional, and cultural. Regarding the economic factor, 37 of the 40 interviewees were dissatisfied with their financial situation, and only one informant openly stated that she went abroad because of family problems. According to this respondent, if she had not left home at that time, everything in her family could have ended fatally: "I had to leave it urgently, maybe it could have been fatal, so I secretly got a visa for the Czech Republic […]." It can be assumed that the other two also left for family reasons. They were young women, one of whom wanted to change her life, and the other left after her husband because he no longer wanted to live in Ukraine, and she wanted to keep her family.

A recent article by T. V. Shepel (2021, pp. 104–110) analyzes the geographical dimensions and main problems of educational migration in Ukraine. The study identifies the mass departure of Ukrainian citizens abroad as a major issue, with the quality of domestic education and difficult socioeconomic conditions driving this external migration. Shepel also points to the active recruitment of Ukrainian students by European and US institutions. After reviewing the legal frameworks around academic mobility in Ukraine, the article traces current trends and statistics in Ukrainian student migration patterns, noting the popularity of Western study destinations. Through statistical analysis, Shepel identifies the key factors and institutions shaping educational migration from Ukraine. The article concludes by offering recommendations for Ukrainian state policy, assessing possible impacts, and suggesting regulatory approaches to manage these migrations while retaining domestic talent and competitiveness. The article comprehensively examines the drivers, trends, and policy implications of Ukrainian educational migration.

THE IMPACT OF EMIGRATION TRENDS ON EDUCATIONAL SYSTEMS: A COMPARATIVE ANALYSIS

Contemporary labor migration trends from Ukraine are shaping and interacting with the country's education system since a significant driver of this migration is the desire to finance quality education for children. Ukrainian migrants prioritize providing their children with access to improved educational opportunities, which has implications for domestic education policies and processes.

The concept is that the movements of Ukrainian migrants seeking better wages abroad, particularly in Europe, are closely tied to perceived deficiencies in Ukraine's education system and a lack of access to quality schooling. This connection between migration and education has not been adequately studied. However, given many migrants' educational aspirations for their families, the impact of contemporary labor migration on Ukraine's schools merits further research.

The key concept is that contemporary Ukrainian labor migration patterns, driven significantly by desires for better education, interact with and shape domestic educational processes in important yet understudied ways. Examining this relationship can inform policies that leverage migration's developmental potential while reducing risks like brain drain.

Singapore offers top students prestigious scholarships and research grants, contingent on returning home to work for some time after studying abroad. This scheme incentivizes return migration among skilled citizens (Ziguras & Gribble, 2015, pp. 246–264). China has created prestigious "Thousand Talents" awards to attract back Chinese scientists and experts who have studied or worked overseas, an approach that strengthens domestic research capabilities (Marini & Yang, 2021, pp. 541–552).

India leverages its large diaspora by encouraging non-resident Indians (NRIs) to invest in the Indian economy, transfer knowledge back home, and act as connections between India and their adopted countries (Maloo, 2023). In the Philippines, government agencies organize job fairs abroad to recruit migrant workers to return home or channel remittances toward local development. Diaspora networks also promote skill transfer (Lu, 2014). The UK and other developed countries have relaxed immigration policies to make it easier for foreign graduates of local universities to stay after completing their education, retaining their newly gained skills (Vega-Muñoz et al., 2021).

Drawing on these examples, strategies for Ukraine could include engaging its diaspora as partners in research and development, targeted recruitment of skilled return migrants, tying education grants to return-home agreements, collaborating with destination countries to facilitate circular migration, and strategic scholarships for studies in key industries. A multifaceted approach is required to curtail the risks of brain drain.

CONCLUSIONS

For example, most respondents cited dissatisfaction with their financial situation as the main reason for going abroad. Many respondents wanted to earn money for a "normal life" before leaving. As respondent Ms. Stefania notes: "For the daily bread." Another respondent left to earn money for her children's education and to finish the house she started building ten years ago. Note that there are reasons for emigration, such as the desire to earn money for repairs or to buy a new apartment or house. However, the practical majority of respondents stressed that the future of their children was important to them, especially "quality education." Although Ukrainians expected the reforms to significantly improve the country's economic situation, market transformations resulted in losses for the majority of the economically active population: wages did not increase, effective demand decreased, and the risk of losing one's job increased. After a brief period of hope for an improvement in their material and social status, a sober awareness of the insecurity of the country's labor market and the need to find new sources of income for themselves and their families emerged.

Thus, the mechanisms of self-organization were introduced. One of the ways of adapting to the new situation was temporary labor migration abroad. It can be concluded that there are many developments regarding the impact of labor migration on the population's life. In particular, developments in economics, politics, and demography, including developments to identify the impact of labor migration on the family, children, values, identity, attitudes, adaptation, and integration of migrant workers in the new environment, can be met. However, the authors could not find any research that would identify the impact of labor migration on educational processes. However, one of the main reasons for labor migration is the need to provide quality education for children.

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POVZETEK

MIGRACIJE V TUJINO KOT DRUŽBENA POSLEDICA PREOBLIKOVANJA IZOBRAŽEVALNEGA SISTEMA V SODOBNI UKRAJINI

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Avtorji v prispevku analizirajo povezave med sodobnimi vzorci ukrajinskih delovnih migracij in izobraževalnim sistemom v tej državi. Najprej naredijo sintezo klasičnih teoretičnih pogledov na družbeno vlogo izobraževanja, pri čemer se opirajo na ključne avtorje na tem področju, kot so Durkheim, Weber in Parsons. Predstavijo, kako izobraževanje posreduje kulturno znanje in oblikuje posameznike tako, da ti zadovoljujejo družbene potrebe. Ponudijo tudi pregled pomembnih sodobnih ukrajinskih raziskav o štirih zgodovinskih obdobjih migracij iz Ukrajine od konca devetnajstega stoletja naprej. Vsako obdobje analizirajo z vidika časa, vzrokov, obsega in demografskih značilnosti. Sedanje obdobje, po letu 1991, izstopa po pretežno gospodarskih vzgibih migracij, v nasprotju s prejšnjimi obdobji, ko so bili vzrok zanje politični pretresi in konflikti. Ključna ugotovitev prispevka je, da sodobni ukrajinski delovni migranti dajejo prednost višjim plačam v tujini, s katerimi financirajo boljši dostop do kakovostnega izobraževanja za svoje otroke v domovini. Avtorji ugotavljajo, da na želje po odhodu v tujino vplivajo nezadovoljstvo s kakovostjo, razpoložljivostjo in cenovno dostopnostjo ukrajinskega izobraževalnega sistema. Analizirajo ukrajinske vladne podatke in akademske študije, ki pričajo o nizki stopnji zaupanja javnosti v domače šole in znatnem izseljevanju študentov, ki si želijo pridobiti visokošolsko izobrazbo v sosednjih državah, kot sta Poljska in Nemčija. Preučujejo tudi reforme, ki so bile v Ukrajini izpeljane po osamosvojitvi, vključno s standardiziranim testiranjem srednješolcev in zagotovitvijo večje avtonomije univerz. Analizirajo tudi vpliv novosti, kot je razmah učenja na daljavo, zlasti v času omejitev gibanja med epidemijo bolezni covid-19, ter opisujejo ovire za reforme, kot sta pomanjkanje digitalnega dostopa in (ne)pripravljenost učiteljev za spletno poučevanje. V prispevku analizirani statistični podatki kažejo na vse obsežnejše migracije študentov in strokovnjakov na področju izobraževanja, zaradi česar obstaja nevarnost znatnega odliva najbolj kvalificiranih domačih kadrov. Avtorji z namenom predstavitve možnih političnih ukrepov predstavijo tudi kratko primerjavo z drugimi državami, kar zadeva izkoriščanje diaspor, programov zaposlovanja, mednarodnih partnerstev in politik priseljevanja za krepitev svojih izobraževalnih sistemov in zmanjševanje tveganj izseljevanja visokokvalificiranih delavcev. Pri tem poudarjajo, da imajo sodobne migracije iz Ukrajine pomembne, a kompleksne vplive na izobraževalni sistem te države, ki so še premalo raziskani, zato so potrebne nadaljnje raziskave na tem področju.

SOCIAL-ECONOMIC INTEGRATION OF KAZAKH MIGRANTS IN TURKEY

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ABSTRACT
Social-Economic Integration of Kazakh Migrants in Turkey
The research aims to describe the social and economic integration of Kazakh migrants in Turkey. Amongst the objectives of this scientific work are research on Kazakh migration into Turkey in the first half of the twentieth century and the determination of reasons and prerequisites for such a process. The primary methods of this research are historical and logical analysis, induction and deduction, and synthesis. The article covers the Kazakh migration to Turkey, the integration process of Kazakhs into Turkey, and the reasons, prerequisites, and factors that led to the migration of Kazakhs from East Turkistan.
KEYWORDS: migration, transmigrants, refugees, diaspora, migrants' integration

IZVLEČEK
Socialno-ekonomska integracija kazaških migrantov v Turčiji
Namen znanstvenega prispevka je opisati družbeno in gospodarsko vključevanje kazahstanskih migrantov v Turčiji. Cilja avtorjev sta tudi raziskati kazahstanske migracije v Turčijo v prvi polovici dvajsetega stoletja ter opredeliti razloge in pogoje, ki so vplivali na ta proces, pri čemer uporabljajo predvsem metode zgodovinske in logične analiza, indukcije in dedukcije ter sinteze. Avtorji proučujejo kazahstanske migracije v Turčijo, proces vključevanja Kazahov v Turčijo ter razloge, predpogoje in dejavnike, ki so privedli do migracije Kazahov iz Vzhodnega Turkestana.
KLJUČNE BESEDE: migracije, transmigranti, begunci, diaspora, integracija migrantov

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INTRODUCTION

According to Bermukhamedova and Abilova (2020, pp. 249–252), the Kazakh diaspora is located in fifty countries and has 5 to 5.5 million people. Nevertheless, it is impossible to clearly evaluate the number in the Kazakh diaspora as it shrinks in many countries. Kuşçu (2016, pp. 380–396) notes that ethnic Kazakhs do not live near each other in European and US territories. Meanwhile, in the Near and Far East, the opposite effect takes place. Since the initial migration, Kazakh people have attempted to save their cultural traditions and ethnic group. Many Kazakh people in Turkey are descendants of Xinjiang, and many still deem this region their homeland. Mendikulova (1997) concludes that an indicator differentiating the Kazakh diaspora from other migrants is a successful integration into the society of the recipient country. This is a prerequisite to their successful integration into countries with developed economies and multicultural structures. The Kazakh mass migration began around the eighteenth century and lasted until 1960. Prerequisites for migration were various: political, religious, and economic. According to Kaiyrken and Makhat (2020, pp. 31–37), the main reason was the intolerance to the oppression from the Chinese government. The beginning of the Kazakh diaspora in Turkey was mainly in 1930, when after the suppression of the Xinjiang rebellion, around eighteen thousand Kazakhs moved from Altay to the territories of India and Pakistan. However, refugees did not settle there for a variety of reasons. Amongst the possible next destinations in the migration were five primary ones, each of which was closely discussed and analyzed:

1. Migration to the Arab countries, mainly Saudi Arabia. Kazakhstan is a predominantly Muslim country, and Islam is the religion of the majority of its population. Kazakhs could easily integrate due to their shared religion.
2. Taiwan, as some Kazakhs were cooperating with Chiang Kai-shek, who had fled there after the Chinese Communist Party took control of mainland China. Chiang Kai-shek was the head of the Nationalist government in China and later in Taiwan. This connection led Kazakh migrants to consider Taiwan a migration destination (Hrubinko & Fedoriv, 2023).
3. The unusual variant was to move to the United States (California and Texas), where the government invited Kazakhs. Various factors affected this variation, including the desire to diversify immigrant populations, economic opportunities, or geopolitical considerations.
4. Remain in India and Pakistan. Some Kazakhs considered the option of remaining there due to their initial migration to these countries.
5. Move to Turkey. Turkey eventually emerged as a significant destination for the Kazakh diaspora due to cultural and historical ties between the two countries.

As a result, Turkey was a suitable choice for Kazakh refugees as permanent residents. This is due to their shared historical and cultural roots. In 1952, some Kazakh refugees moved to Turkey. They received Turkish citizenship and land and were given homes and cattle there. In the 1970s, Turkish Kazakhs successfully integrated into the country's economy and earned their wealth from producing and selling leather. According to Baypakov and Smagulov (2010), more than twenty thousand Kazakhs currently reside in Turkey. Many live and work in Istanbul's Gunashli, Sefekay, and Zeitinburg districts.

The main goal of this research is to delineate the intricate process of social and economic integration among Kazakh migrants in Turkey. The study aims to uncover the motivations behind Kazakh migration to Turkey during the first half of the twentieth century, as well as the factors and prerequisites underpinning this migration. This study focuses on the nuances of their integration journey and emphasizes the adaptation and economic participation of the Kazakh diaspora in their host country.

The novelty of this research is in its comprehensive examination of the social and economic integration of the Kazakh diaspora within the Turkish context. While previous studies have explored various facets of Kazakh migration and the diaspora's experiences, this research seeks to address an existing gap by providing an in-depth analysis of their integration process in Turkey. Through a detailed exploration of historical, cultural, and economic dimensions, this study endeavors to contribute valuable insights into the dynamics of diaspora integration and its impact on both the host society and the migrants themselves.

MATERIALS AND METHODS

The basis of the methodological approach in the research is a quality combination of historical, cultural, and logical analysis during the study of literature, deduction, induction, and synthesis, which allowed us to deduct the primary peculiarities of the process projection. Scientific research covers the social and economic integration of Kazakhs in Turkey, the migration process description, and their reasons and prerequisites.

This scientific work was concluded in three main stages. The first stage of the research was dedicated to the theoretical basis, which was then used as an initial fundament for scientific research. A collection of theoretical sources and an analysis of information on this topic were concluded. The aims of the article were formed, the research problem was deducted, and forms and methods of its analysis were stated. The actuality of the research was also determined, and short reviews of other research on this topic were also presented. Reasons and prerequisites of Kazakh migration from Xinjiang were highlighted. Through logical analysis, we deducted a connection between the political oppression of Kazakhs in China and their migration to other countries.

In the second stage of the scientific research, analytical research on the Kazakh migration into Turkey process was concluded. A historical and cultural analysis determined the main reasons and prerequisites of Kazakh migration into Turkey. We also investigated the peculiarities of Kazakh ethnic migration into India and Pakistan and their subsequent move to Turkey. Moreover, we observed a connection between the Kazakhs' successful integration into Turkey and their shared history.

In the last stage of the scientific work, we systematically categorized and synthesized the material acquired during the research and study of other scientists' work. Based on the results of their scientific work, we formed conclusions to determine the overall tendencies of economic and social integration of Kazakh refugees in Turkey.

RESULTS

Kazakh migration prerequisites

Before the migration, Kazakhs were the largest ethnic group in Xinjiang after Uyghurs, and in 1945, their population was around 439,000 people (Noda, 2019, pp. 25–42). They were living mainly on animal husbandry and related professions. Kazakhs were settling there in the 1880s. According to the existing historical data, in 1883, nearly one hundred Kazakh families moved to the Altay first, under the rule of Daldebay and Kokdarhan naimans, which had moved through Jimsar, Mori, and Baytik Mountain in the Barkol region of East Turkestan (Xinjiang). In 1895, another two hundred families moved to Barkol, and during 1912–1913, one thousand more.

Even though East Turkestan was under the control of Pekin, Kazakhs have lived in the husbandry region relatively autonomously. During the Qing Dynasty, their rulers had such ranks as *uang* or *gyun*, *beis*, *tayzhi*, *ukyrdai*, *zalyng* and *zanggi*, *zhuzbasi* and *auylbasy*. It is worth noting that this region was not under the full control of Pekin. This was especially prominent when the Xinhai Revolution overthrew the Qing Dynasty in 1912. Then, Chinese governors, usually appointed from the center, started acting more independently, usually employing overly cruel control methods. Pressure and oppression of Kazakhs and Uyghurs in the region were more apparent, as local governors wanted to ensure their rulership position, and freedom-loving residents of Xinjiang were ready to defend their lifestyle with arms in their hands. During the rule of local governors Jin Shuren (1928–1933) and Sheng Shicai (1933–1944), the situation reached its boiling point (Forbes, 1991).

The period saw restrictions on Kazakh language education and ever-increasing local taxes. During an attempt to stabilize the situation in regions, native lands were confiscated by local authorities and distributed amongst Chinese migrants. People were punished and sentenced to death even for minor infractions. After the arrests of popular Uyghur and Kazakh representatives of East Turkmenistan, they rebelled. Although the rebellion was initially successful, they could not match the governor's

forces, which were overpowering them in numbers and equipment quality by a large margin. As a result, it is possible to denote that cruel and violent treatment by Xinjiang governors was a key factor in the Kazakh massive exodus from East Turkistan.

Migration from Xinjiang to India and Pakistan

Having faced harsh realities, some Kazakh leaders of Kymyl and Barkol regions met secretly in August of 1935 and discussed help from Ma Bufang, a Muslim general who had controlled neighboring provinces of Gansu and Qinghai. At the beginning of 1936, Kazakh groups moved to Gansu individually. They clashed in brutal fights with Sheng Shicai forces on the way, but they were welcomed in Gansu. Around 18,000 Kazakhs, including women, children, and cattle, relocated from Xinjiang during this period (Kara, 2019, pp. 1–11). Therefore, an exodus from Xinjiang began. In Gansu, however, Kazakhs did not stay for long. The unwillingness to be an instrument in Ma Bufang's political games and conflicts with the local population forced Kazakhs to move forward. They decided to move south to Hindustan. Around five thousand people went on the journey. Even though Chinese soldiers tried to block the route for the Kazakhs, they managed to fight their way to Tibet. There, during the year, they clashed with local tribes while suffering from hunger, cold, and suffocation. Different estimates note that around two thousand Kazakhs died, 40% of their total exodus to India. Despite all the complications on the journey, in September 1941, migrants managed to get to India (Figure 1).

Figure 1: In 1950, a group of Uyghurs escaped during the communist Chinese invasion and sought refuge in Kashmir, India (Radio Free Asia, 2023).

Their trouble persisted even after crossing the Indian border. Initially, they were in the refugee camp in Muzaffarabad, where they were kept in practically prison-like conditions, which led to many deaths. Tropical climate, unusual for migrants, also had its influence. In 1940–1950, they were accustomed to the conditions of India and Pakistan. They also managed to befriend local Muslims. However, they could not comfortably live in a foreign environment, as lingual and cultural differences between locals and foreigners were too steep. Due to the refusal of Pakistan and the Indian government to give them citizenship, unsatisfactory conditions of living, etc., Kazakh migrants started to grasp the lack of perspectives in Pakistan and India. A question of migration to other countries started to appear.

Relocation to Turkey

During a meeting of Kazakh leaders in Srinagar, they decided to migrate further to Turkey, as their local populace was closer to them linguistically and religion-wise (Gayretullah, 1977). With this, in the early 1950s, a Kazakh delegation visited a Turkish consul, presenting a list of people who wanted to migrate to Turkey. An interesting addition to the topic of Kazakhs' stay in India and Pakistan is help from the United States. US representatives offered assistance to Kazakh refugees during their stay in India, Pakistan, and other countries primarily as part of their geopolitical strategy during the Cold War era. The US government saw an opportunity to utilize the Kazakh refugees as a potential asset against the Communist regime in China, which was aligned with the Soviet Union (Zhanbulatova et al., 2020). The assistance provided by the US representatives involved indirect support and agitation to further the US agenda. This was done through indirect help and agitation among the Kazakh people (Ono, 2019, pp. 43–83). The United States might have lobbied for humanitarian aid to be directed toward Kazakh refugees through either international organizations or bilateral agreements. This aid could include food, shelter, medical care, and other necessities for their well-being. In some cases, US representatives might have been involved in facilitating safe havens for Kazakh refugees, offering protection from potential threats or harassment from the Communist regime or other hostile entities. The United States could have supported cultural and educational exchanges for Kazakh refugees, aimed at empowering them with skills and knowledge that would enable them to contribute positively to their host countries and potentially assist in their eventual return to Kazakhstan (Nurtazina & Toktushakov, 2017).

On October 17, 1951, the Association of East-Turkestan Kazakh Refugees was founded, which aimed to:

1. Organize migration of Kazakh political refugees from Pakistan to Turkey, which required close connections to the Turkey embassy in Karachi. The collection of material required for migration was also concluded.

2. Ensure positive relations with the Pakistani government.
3. Resist any actions of the Embassy of the People's Republic of China, which agitated Kazakh people to return to China.
4. Provide any help required for Kazakhs who escaped from East Turkistan and reached India and Pakistan borders.

As a result of the successful activity of the organization, fourteen thousand Kazakhs were added to the list of refugees, four hundred of whom were children who had been in India and Pakistan in the previous twelve years (Gür, 1995). Later, this list was given to Nebil Bati, an ambassador of Turkey in Pakistan, and in February of 1950, a pleading for migration to Turkey was filed. During this year, an answer from Ankara was given, which stated that Kazakhs would be accepted as migrants, but they had to wait while bureaucratic procedures were conducted. Meanwhile, the second group of Kazakh migrants from East Turkestan arrived in Kashmir in 1951. These people left their native lands as they chose not to conform to the Mao Zedong regime instated by the Chinese Communist Revolution in 1949. Pakistan Kazakhs contacted the group and recommended they migrate to Turkey together. On March 13, 1952, the Turkish government, under the chair of Prime Minister Adnan Menderes, decided to allow the migration of Kazakh refugees from Pakistan, India, and Kashmir. This meant that Turkey had officially recognized them as refugees (Gayretullah, 1977). The first 102 migrants traveled through Kashmir, India, Pakistan, and Iraq on cars to the Turkish border. There, they went to Istanbul by train. It took them around twenty days. Through the efforts of members of the Association of East-Turkestan Kazakh Refugees, 1,379 Kazakhs who had migrated from India in 1941 moved from Pakistan to Turkey between September 12 and December 26, 1953 (Gür, 1995).

Social-economic integration of Kazakhs in Turkey

Kazakh refugees in Turkey were divided into two categories: "Free migrants" and "settled migrants." The former were Kazakhs who arrived in Turkey in 1952 from India and Pakistan and were not on the list evaluated by the Turkish government. They settled in Ceylanpinar, in the Urfa Province. There, they were working on one of the largest Turkey farms (Figure 2). "Free migrants" received Turkish citizenship and were not taxed. They could receive a loan to build a house or start a business (Andrews, 1989). "Free migrants" are the majority of Kazakh refugees in Turkey. They arrived in 1952–1958 with a total estimation of 1,900 people. Officially settled migrants were given citizenship, land, home, and cattle. They were accommodated in the refugee camps near Istanbul: Zeytinburn, Tuzla, and Sirkeci. There, they were taught the Turkish language and simple professions. The traditional profession of Kazakh is husbandry. However, for most Kazakhs in Turkey, it has changed. Kazakhs have come to the country without any capital, and as refugees, they were working in any job

they could find. They worked jobs, such as house and road building, for around ten years. Animal husbandry, a previous Kazakh profession, was practically unavailable in Turkey (Kalshabaeva & Beisegulova, 2018, pp. 153–160).

Figure 2: Kazakh refugees, late 1950s (source: Lias, 1956)

Kazakhs also worked at farming, growing wheat. This profession was common amongst Kazakhs who settled in Konya, partly due to the geographical peculiarities of the region—being a flat plain suitable for farming. The government has given them land and horses. In teams of ten to twenty people, Kazakhs started to plow fields and grow plants. However, lacking farming skills and experience, they were forced to find other ways of earning a living. Thus, they came to handicraft and leatherwork. At least a single sewing machine was present in each Kazakh family. Thus, in the 1960s, Kazakhs began developing a sphere new to the Turkish economy— leather processing and leather product manufacturing. They produced leather gloves, hats, and covers, sold them on the market, and began an entrepreneurial practice. This led to their profit and society status improvement. Home workshops grew into whole manufacturing. Families moved from villages to the closest cities and then to economic centers, such as Istanbul, Izmir, and Ankara, with the intention of continuous expansion (Mendikulova, 1997).

The Kazakh people's historical nomadic lifestyle significantly influenced their ability to adapt to new conditions. Having spent millennia living as nomads developed their social, psychological, and physical capacities, making them resilient and versatile (Tastulekov et al., 2019). This adaptability translated well into their integration efforts in Turkey. Upon their arrival in Turkey, Kazakh refugees demonstrated a strong entrepreneurial spirit. Lacking capital and facing the necessity to find work,

they took on various jobs, including manual labor and house building. Their willingness to engage in diverse economic activities showcased their determination to succeed. Recognizing that their traditional profession of animal husbandry was not readily available, they seized the opportunity to develop the leather processing and manufacturing sector in the 1970s. This shift allowed them to contribute to the Turkish economy and establish a significant presence in the leather industry. Kazakh families moved from rural areas to urban centers like Istanbul, Izmir, and Ankara as their leather businesses expanded. This strategic migration allowed them to tap into larger markets, access resources, and expand their business operations. Higher education led to diversification in their professional pursuits and enhanced their contribution to the Turkish economy (Akgün, 2019; Komilova et al., 2021).

Kazakh migrants shared religious and cultural affinities with the host Turkish society. This commonality facilitated social interactions and eased the process of assimilation. The Turkish government's policy of providing citizenship, land, housing, and support to refugees, including Kazakhs, significantly aided their integration (Koulish & Fouskas, 2022). The availability of resources and opportunities helped them establish themselves as self-sufficient members of society. The Kazakh community's cohesion and mutual support among its members played a pivotal role in their integration. Sharing common experiences and assisting one another created a sense of belonging and facilitated their transition into Turkish society.

DISCUSSION

Rakhimzhanova (2021) notes that after some time spent in India, Kazakh migrants asked for shelter in Turkey, where they were accepted as Turkic people with a shared history. The author also concludes that although Turkish, they are visually distinct from other Turkish people, mainly because of their atypical appearance. Kazakh people, due to their Central Asian origins, may have physical features that are distinct from the Turkish population. These features include variations in facial structure, skin tone, eye shape, and hair texture. Kazakh refugees maintained certain elements of their traditional clothing, which can stand out compared to the clothing typically worn by most of the Turkish population. Nevertheless, the successful integration of Kazakhs into the Turkish environment is an interesting depiction of Kazakh identity flexibility and their ability to adapt to the environment. Conclusions on the successful integration of Kazakh refugees in Turkey are similar to those made by the author. While investigating the Kazakh diaspora in Turkey, Zafer (2020) describes Kazakhs as an ethnic group with their own cultural identity and traditions as well as their migration process from East Turkistan. He states that Kazakhs were forced to leave their native lands due to cruelty from the Chinese. The researcher states that their path lay through Gansu, Tibet, Kashmir, India, and Pakistan. He concludes that the Kazakh diaspora in Turkey was formed during a long migration period, initially thought of as

temporary. Conditions, however, forced them to settle down in a new place. Zafer's conclusions on the migration of Kazakhs from East Turkistan are similar to those of this article's authors.

For a wider understanding of the problem, it is necessary to point out the number of Kazakhs residing outside the Republic of Kazakhstan. In the article "Meeting the Kazakh Diaspora," Wood (2019) notes that around four million Kazakhs reside outside Kazakhstan, a quarter of the total Kazakh population. She notes that other countries' annexation of their territories is the primary reason for the migration. Other reasons are those of political, religious, and economic origin. The problem of the national identity of Kazakhs in Turkey is noted in Demirci's research, which considers an attempt to evaluate the value of Kazakh culture amongst them, the place of culture in their identity, and the transformations that took place during the development process (Demirci, 2020, pp. 321–342). According to the conclusions, identity is determined by one's existence in society, one's perception of society, and one's belonging to it. It is apparent that the peculiarities—everyday life, traditions, and ceremonies—of the country in which one is living play a great role in the understanding of the Kazakh identity (Bozorgmehr & Díaz, 2022). Demirci thinks that to restore the uniqueness of their cultural heritage, Kazakhs utilize reconstructions of the national identity of the traditional period. Thus, the information presented is a valuable addition to the conclusions made in this article.

While discussing the Kazakh refugee integration in Turkey, their political life in the country is worth noting. Kidal (2020) thinks that Kazakhs were getting closer to the Nationalist Movement Party (NMP) and actively participated in Turkey's political life from 1968 to 1980. The NMP's anti-communist rhetoric managed to attract Kazakh migrants because, back in their homelands, many of them had suffered under communists. Another factor that familiarizes NMP and Kazakh is the movement of Pan-Turkism, which is determined to unify all the Turks, of which Kazakhs are a part (Besenyő & Málnássy, 2022). As such, many Kazakh migrant representatives were able to contribute to the politics in NMP. In their work, Tlebaldiyeva et al. (2021, pp. 3390–3395) state that Kazakh–Turkish relations were promising from the beginning. Kazakhstan's initial and primary task was its recognition by other countries and integration into a global society. Turkey had a prominent role in this task. Researchers have concluded that close cooperation with Turkey allowed young countries of Middle Asia and the Caucasus to gain independence, to close with European institutions and the United States, and to receive economic help from Turkey and their Western allies. An important factor in the support of Kazakhstan in all of the international organizations is their lingual, religious, and cultural proximity (Omurzakova et al., 2022). Even though the research topic is barely related to the problem of this article, it is a small and natural addition to the research, as it analyzes the modern relations between Turkey and the Kazakhstan Republic, especially in the scientific sphere.

Saylan and Chabdenova (2020, pp. 322–325) investigate the history of the Kazakh diaspora migration to Turkey, which occurred twice during the 1950s and

1990s, and social and material assistance given to the refugees by Turkish people, which enhanced their living conditions. As a result, Kazakhs managed to develop various spheres in Turkey, which led them to success, mainly in the leatherworks (Tsybukh, 2023). Researchers also observe that despite living in another country, Kazakhs keep their traditions and culture while living in groups. Researchers focus on the fact that small leatherworks and leather product manufacturing companies created by Kazakh migrants were successful as this was their traditional profession. Saylan and Chabdenova's conclusions and this article on Kazakh social and economic integration in Turkey are similar and contribute to each other.

Analyzing the social and economic integration of Kazakh refugees into the Turkish system in the first half of the twentieth century is an actual task, as it allows us to conclude and evaluate the influence of ethnic and cultural belonging on the integration process in another country. Research of this process is an important topic of scientific investigation and attracts the interest of sociologists, historians, and representatives of other countries. The authors of this article have provided the main reasons and prerequisites for the migration of Kazakhs from their historical home. It was mainly due to the aggressiveness and oppression from local Chinese authorities. The authors' interpretation of presented results may be a basis for a new hypothesis or theory in this discourse or other directions.

The Kazakh integration process into Turkey's social and economic system was analyzed. The authors describe professions that helped Kazakhs succeed in Turkish society, mainly through leatherwork. They note that this way, Kazakh refugees have created a new industry in the Turkish economy and, through manufacturing, have matched Turkish companies. The authors also described the migration process of Kazakhs from East Turkistan to Turkey. It began in Xinjiang, from which Kazakhs have moved south to India and Pakistan through the Tibet mountains. They assert that this journey was not easy and was full of obstacles: pursuit by Chinese forces in Xinjiang; hunger, cold, and armed resistance from Tibet tribes, which carried away around 2000 Kazakh lives; long-lasting stay in India and Pakistan, which ended in adoption by Turkey as refugees. As a result, the scientific research aim was completed, and an actual problem was solved. The results of this research mostly coincide with those of other authors. However, the problems, which are related to the scientific aim of the research, still require further investigation and diagnostics.

CONCLUSIONS

We can conclude that Kazakh refugees have successfully integrated into every layer of Turkey's social and economic life, as they have become full-fledged members of the society in the country. This article highlights the tendencies of Kazakh refugee integration into the Turkish social and economic systems, indicating reasons and prerequisites to the migration from East Turkistan and describing the process of

Kazakh relations and its complications, which they had to overcome in the journey. The main reason for Kazakh migration from Xinjiang was the aggressive and repressive policy of Chinese authorities, which tried to strengthen their power in the region by suppressing the nomad Kazakh and Uyghur. It was also apparent that one of the prerequisites to the adaptation of Kazakhs in Turkey was their shared nomad history, which substantially influenced their physical and psychological abilities. We conclude that Kazakh refugees in Turkey successfully integrated into the country by naturally adopting Turkey's social and economic system.

The materials of this article may be useful and novel for sociologists, historians, political scientists, and scientists studying the social and economic integration of Kazakh refugees in Turkey in the first half of the twentieth century. Moreover, the data of this article will be valuable for specialists in sociology and history, students, and researchers interested in the East Turkestan Kazakh integration into Turkey, the reasons for it, and the prerequisites to the process. It is worth prolonging the in-depth research of the Kazakh integration into Turkey. The concluded investigation does not cover every peculiarity of this historical-sociological problem. It requires further analysis of such questions as the Xinjiang Kazakh exodus and the reasons for and prerequisites of the phenomena.

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POVZETEK

SOCIALNO-EKONOMSKA INTEGRACIJA KAZAŠKIH MIGRANTOV V TURČIJI
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Prispevek ponuja podrobno analizo migracij etničnih Kazahov iz kitajske pokrajine Šindžjang v Turčijo v začetku dvajsetega stoletja. Avtorji s pomočjo zgodovinske analize, logičnega sklepanja in drugih metod raziskujejo dejavnike, ki so vplivali na odhod Kazahov, na njihovo potovanje v Turčijo ter na njihovo prilagajanje. Glavni vzrok za migracije Kazahov iz pokrajine Šindžjang je bilo zatiranje kitajskih oblasti. Zaradi njihovih agresivnih politik, s katerimi so želeli zatreti nomadska kazaška in ujgurska ljudstva, je bilo na tisoče ljudi prisiljenih v beg in iskanje zatočišča. To so bile ene najštevilnejših migracij Kazahov, in danes po ocenah živi v diaspori v petdesetih različnih državah med 5 in 5,5 milijona Kazahov. Kazaški begunci so se morali podati na dolgo pot iz Šindžjanga preko Indije in Pakistana, polno nevarnosti, kot so lakota, hud mraz in napadi lokalnih plemen, preden so končno dosegli Turčijo. Pripovedi o tem napornem potovanju pričajo o tem, kaj vse so bili Kazahi pripravljeni tvegati, da bi ušli zatiranju in našli pot na svobodo. V Turčiji so kazaški begunci dobili državljanstvo, zemljo, streho nad glavo in živino, da so se lahko ustalili. Kljub temu pa so se le stežka vključili v tamkajšnjo družbeno strukturo in gospodarstvo. S tesno povezano skupnostjo in kulturnimi vezmi so si postopoma našli svoje mesto v turški ekonomiji. Najprej so se oprijeli vsakega razpoložljivega fizičnega dela, sčasoma pa so se specializirali za usnjarstvo, pri čemer so se oprli na svoje veščine, pridobljene v dolgi zgodovini nomadskega pastirstva. S tem so pripomogli k razvoju usnjarske industrije v Turčiji. Danes v Turčiji živi več kot 20.000 Kazahov, velika večina v istanbulskih predelih Gunashli, Sefekay in Zeitinburg. K njihovi lažji asimilaciji so pripomogle skupna muslimanska vera in turške kulturne korenine, ki si jih delijo s turškim narodom, pa tudi njihova prilagodljivost pri vključevanju v družbo gostiteljico zaradi svojega nomadskega porekla.

Zanimivo je, da so nekateri Kazahi našli še dodaten način socialne integracije s politično participacijo. Pridružili so se turški protikomunistični Stranki nacionalističnega gibanja (MHP) v Turčiji in na ta način pokazali svoje ostro nasprotovanje komunistični Kitajski. S svojim političnim aktivizmom so pokazali na še eno možnost integracije, ki jo imajo odločni migranti. O tem pričajo tudi fotokopije zgodovinskih dokumentov, prikazane v prispevku. Avtorji z analizo kulturnih vezi in vztrajnosti migrantov prinašajo spoznanja o lažjem vključevanju diaspore, poleg tega pa s proučevanjem tega slabo raziskanega vidika kazaške zgodovine pripomorejo k boljšemu akademskemu razumevanju prisilnih migracij in procesov prilagajanja. V prispevku predstavijo razburljivo potovanju kazaških beguncev in obravnavajo njihovo končno integracijo v Turčiji, s čimer prispevajo k širšim zgodovinskim pogledom

na diaspore. Prikažejo, kako se lahko migranti s skupnimi kulturnimi koreninami in močnimi skupnostnimi vezmi uspešno prilagodijo in prispevajo k svoji novi domovini. Zgodba kazaških migrantov je zgodba o preizkušnjah in premagovanju težav z vztrajnostjo in postopnim vključevanjem v strukturo družbe gostiteljice.

EXPLORING ETHNIC ENTREPRENEURSHIP: FAMILY BUSINESS OF TAJIK MIGRANTS

Zhuldyz Imasheva[I]

ABSTRACT

Exploring Ethnic Entrepreneurship: Family Business of Tajik Migrants

The article aims to study the peculiarities of the ethnic entrepreneurship of Tajik migrants. The method of interview-narratives was used. The study was conducted based on the "Green Bazaar" in Almaty, which is the center of the accumulation of migrant entrepreneurs. The author formed a certain portrait of a businessman and highlighted the factors of influence on ethnic entrepreneurship. The key feature of the analyzed problem is the collective nature of work, namely, the conduct of business by whole families. The study results highlight the key aspects of building an effective policy toward migrant entrepreneurs.

KEYWORDS: labor migration, migration policy, emigrants, business, enterprise

IZVLEČEK

Etnično podjetništvo: Družinska podjetja tadžiških migrantov

Avtorica v prispevku preučuje posebnosti etničnega podjetništva tadžiških migrantov, pri čemer uporablja metodo pripovednih intervjujev. Študija je bila izvedena na podlagi »Zelenega bazarja« v kazahstanskem mestu Almaty, ki je največje središče migrantskih podjetnikov. Avtorica predstavi neke vrste portret takšnega podjetnika ter dejavnike, ki vplivajo na etnično podjetništvo. Ključna značilnost analizirane teme je kolektivno delo, in sicer sodelovanje celotnih družin pri podjetništvu. V rezultatih študije so predstavljeni ključni vidiki, potrebni za oblikovanje učinkovite politike do podjetnikov migrantov.

KLJUČNE BESEDE: delovne migracije, migracijska politika, izseljenci, podjetje, podjetništvo

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INTRODUCTION

The collapse of the Union of Soviet Socialist Republics (USSR) significantly affected the economy of the individual republics that were part of it. The participating countries, which had certain roles in the distribution of labor and the extraction of resources under the auspices of one country, actually remained in their own care. For example, Tajikistan, a country with a high level of development in agriculture and trade, needed to search for marketing channels not only for finished products but also for a workforce with high skills in a particular industry. Another key aspect that influenced the life of the population of the former USSR member countries was the transition from socialist ownership of the means of production to the development of entrepreneurship (Voyvoda, 2022; Shahini et al., 2023). The population, actually left without the opportunity to provide for their families, was forced to look for new ways to earn money. Russia remained the main direction of migration of the population of Tajikistan for many years. However, due to the tightening of the Labor Code (including aspects regulating the labor of migrants), many Tajiks shifted their migration vector to Kazakhstan (Yugay, 2022, pp. 206–220). For many years, Kazakhstan, an economically developed region of Central Asia, has been an alternative to moving to Russia. Current data from the Migration Service of Tajikistan indicates that 10.5 thousand Tajiks live and work in Kazakhstan (Yukhudzoda, 2022).

To date, Tajik migrants and their families have faced new challenges. From March 4, 2022, certain rules for issuing temporary and permanent residence permits to foreigners and stateless persons in Kazakhstan changed in Kazakhstan. These changes led to reduced numbers of arrivals and the deportation of Tajiks and their families already living there (Rofe, 2022). Introducing new rules for the stay of migrants may damage the economic condition of Kazakhstan since the free movement of labor made it possible to fill niches with low wages and effectively distribute labor resources (Christian & Preston, 2019, pp. 783–808). The topic of labor migration of Tajiks and their adaptation to running a family business in Kazakhstan is only partially studied in modern scientific literature. So, for example, S. S. Raufov (2020, pp. 266–272) considered the temperament of migrants, its features, structure, and dependence on the geography of migration. In her study, G. Sh. Nazarova (2019, pp. 46–51) examines the differences between migrants who got jobs in Russia and those who temporarily chose this direction and moved further to Tajikistan or other countries. K. Sharifzoda (2019) analyzes the prerequisites for labor migration to Kazakhstan against the background of a change in the vector from Russia and the volume of migrant flows, taking into account different countries. In his article, E. Lemon (2021) describes the business organization at the "Green Bazaar" in Almaty and the ratio of migrants and local sellers in the context of trade.

B. Tatibekov (2018, pp. 33–36) considers the processes of migration to the countries of Central Asia and highlights the common features of the countries as directions for labor resettlement. The key factor in the migration of citizens to

neighboring countries is the Russian language of communication. The influence of various economic factors on the causes of population migration is exhaustively considered in the work of M. Weidenbaum (1996, pp. 141–156). The American economist pays attention to the financial motivation of migrants, considering the issue from the point of view of sciences related to sociology. Researchers O. Brednikova and O. Pachenkov analyze the connections of migrants in the new society and the construction of their connections based on ethnicity. The authors emphasize that in addition to family ties, building relationships between migrants and contractors depends on economic factors and the conditions of interaction (Brednikova & Pachenkov, 2002, pp. 74–81).

At the same time, despite the study of certain aspects of the topic, such as the prerequisites for migration or the problems of discrimination, the portrait of a Tajik migrant remains unaccounted for. The problem of population migration due to various economic reasons does not only apply to the countries of the former USSR. For example, increased migrations to various European countries after 1945 and an increase in population migration after the 1965 US reform are still the subject of study by scientists around the world (Aldrich & Waldinger, 1990, pp. 111–135; Koulish & Fouskas, 2022). Separate studies of problems in the context of the East indicate that more than half of the population of Southeast Asia are ethnic Chinese. A comparative analysis of the volume of migration to European countries and US states indicates a significant influx of migrants to the United States from various countries even today (Deutschmann, 2021; Dorn & Zweimüller, 2021, pp. 49–76).

Even though much research has been conducted, some questions still need to be studied. There is limited comprehensive research on Tajik migrant entrepreneurship in Kazakhstan, a lack of examination of how family ties in Tajiks evolve as businesses develop, and an understudied impact of generational authoritarianism on young entrepreneurs.

The article aims to examine Tajik migrant entrepreneurship in Kazakhstan, including the factors shaping this phenomenon and its implications for migration policy. The key objectives are analyzing the process of Tajik migration to Kazakhstan and its impact on migrant families, examining the development of ethnic businesses among Tajik migrants, and exploring the role of family ties and relationships in Tajik migrant entrepreneurship.

MATERIALS AND METHODS

The study was carried out based on interviews with individual representatives of migrant families who work at the "Green Bazaar" in Almaty. The "Green Bazaar" is the largest market in Kazakhstan, with a history dating back to the nineteenth century. Today, it thrives as a bustling hub of commerce and economic activity. For Tajik migrants, this marketplace serves as an arena for establishing new sources

of income through trade. The concentration of the Tajik diaspora traders fosters a sense of community, while interactions with locals and other groups reflect broader economic integration. These dynamics make the Green Bazaar a great location for exploring the Tajik migrant entrepreneurship in Kazakhstan. The survey was conducted by contacting respondents and in the format of a directed survey on a given topic. The authors informed the participants about the anonymous and voluntary participation, and the participants provided their consent. The key questions raised at the beginning of the conversation were: "Tell us about the prerequisites for migration to Kazakhstan?" "What determines the choice of trade as a way to provide for a family?" "What challenges did you face in the process of developing your own business?" "Did you feel the support of relatives when opening a family business?" "How has the presence or absence of family support affected you and the success of your business?" It is important to emphasize that there are a number of factors that influence the selection of the sample. In particular, some respondents fear research or are reluctant to share their stories with the public. This is because many businessmen operate illegally and without official permission.

The sample included various age categories, income, and education levels. Thus, only one respondent among the surveyed participants has a higher education. The age limits of the respondents are allocated within the range of 17–52 years. The gender identity of all respondents is expressed as 100% male since females are not directly involved in running the family business. In the rare cases where this is possible, it is the man who bears the full responsibility and the opportunity to discuss the family matter with others. In total, the author conducted fifteen narrative interviews. In the course of forming conclusions on the study, cases of three families whose paths to business have their own specific features were selected and, to one degree or another, confirmed the conclusions of sociologists who have previously studied this topic.

The theoretical stage of the study involved the study of the prerequisites for labor migration of Tajiks and the factors influencing the choice of place of work and residence. The analysis of the choice of Kazakhstan as a country for employment was carried out, taking into account the historical events that influenced the fact of migration as such. In addition, the labor legislation of the countries considered for migration and social factors both within migrant families and in the external environment of their residence were taken into account. The scientific works of sociologists served as the foundation for the theoretical part of the study.

The main stages of the empirical part of the study can be described as selecting a sample, selecting research tools (the choice of conducting interview-narratives with representatives of migrants), preparing questions, and conducting the interview itself. The field site of the study is the "Green Bazaar" in Almaty. The author chose this site for research based on the many ethnic Tajik entrepreneurs who run a family business here. Employed entrepreneurs are engaged in both wholesale and retail trade. The bazaar is of particular interest for research not only because migrants

from different countries are concentrated here but also because it is an important element of the economic and social life of the city. Along with Tajik entrepreneurs, trade is also carried out by local residents, allowing us to explore the differences in business opportunities for citizens of the country and visitors.

RESULTS

Migrant entrepreneurship in Kazakhstan

To further understand the course of the study, it is important to review the basic terms. The study considers the concept of "entrepreneur" as a person doing business with employees or performing a task with a certain degree of autonomy in the market. At the same time, the hallmark of a migrant entrepreneur is, as such, the lack of innovation and the reproduction of old forms of business (Aldrich & Cliff, 2003, pp. 573–596). Unlike the classical understanding of entrepreneurship, most ethnic entrepreneurs simply copy and reproduce the old forms, that is, what is fundamental. This is especially noticeable in the retail trade and services sector, where the majority of ethnic "enterprises" are located (Aldrich & Waldinger, 1990, pp. 111–135). Summarizing the thoughts of sociologists, it is possible to form a definition of "migrant entrepreneurship," which refers to income-generating business activities undertaken by migrants in their destination country.

Kazakhstan was chosen as a country for research because population migration is one of the key factors in filling the human capital of this country. First, this is evidenced by the volume of migration from neighboring countries and the fullness of individual trade structures with emigrant workers. By its very nature, migration is a complex process influenced by demographic, economic, and social factors within both the country of origin and the country from which the refugees are coming. These factors affect not only the volume of migration but also the gender and age structure of migration processes, the standard of living and education of the masses of migrants, etc. (Bozorgmehr & Díaz, 2022). Today, Kazakhstan is one of the popular destinations for labor migration from neighboring countries. The official statistics of the Republic of Kazakhstan state that 2,518 Tajiks arrived in the country at the beginning of 2022. An analysis of indicators over the past five years suggests that since 2018, the number of Tajik migrants has more than tripled. As described above, one of the most common reasons for migration is moving for further employment (Figure 1).
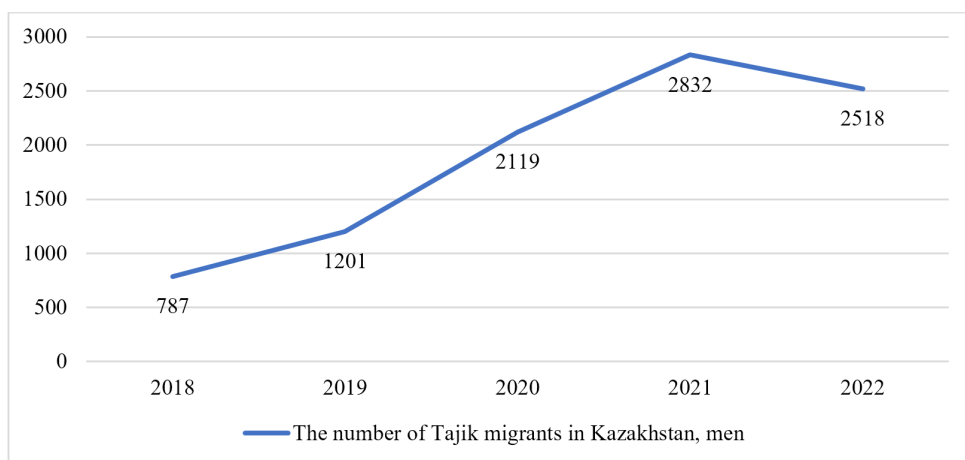
Figure 1: The number of Tajik migrants in Kazakhstan for 2018–2022 (source: composed by the author).

Kazakhstan's economy depends on the level of oil production (Mussin & Mussina, 2023). Due to its sharp increase, the country has recently seen a demand for labor of various formats: highly qualified workers with higher education and skills in industry and low-skilled workers involved in the bazaars (Sharifzoda, 2019). This has become the main reason for labor migration from nearby countries to Kazakhstan. The research for this article was conducted on the territory of one of the largest markets in the city of Almaty, the "Green Bazaar." The market began to function as early as 1875 and was a guest yard where visiting merchants stayed for the night. The Gostiny Dvor was gradually overgrown with small shops of local sellers, which subsequently led to the expansion of the trading area and the organization of a large market. The systematic development and reconstruction of the bazaar has led to its being one of the largest in Kazakhstan today. The "Green Bazaar" is particularly interesting for research because it is a colorful example of a market with many migrant entrepreneurs (Antonov, 2021).

Despite the popularity of "Green Bazaar" and other markets in Kazakhstan, there is still a discourse among scholars about their future development. R. A. Spector (2008, pp. 42–53) describes the need to reform the political attitude to the issue of organizing the work of bazaars, introducing official policy, reconstructing retail space, and departing from the post-Soviet influence on trade. A distinctive feature of the "Green Bazaar" is the concentration of not only migrant entrepreneurs but also a large number of local residents. One of the main products is dried fruit, which adds a special color to the place and makes it attractive to tourists. During the study, the author conducted fifteen narrative interviews with representatives of migrant sellers.

Segments of Tajik Migrant Entrepreneurs

Based on the conversations with Tajiks, several formats for developing ethnic entrepreneurship in the modern market have been identified. Three segments of entrepreneurs have been formed, each with certain characteristics.

The first segment is entrepreneurs who have chosen Kazakhstan because of the similarity of mentality and religious views with the country of origin. A large diaspora and tangible support of compatriots in the place of deployment significantly impacted the relocation of such entrepreneurs. Together with this important aspect are strong family ties in the family of migrants. Building a business for such entrepreneurs necessarily requires the support of close relatives (Yaroshenko et al., 2018). The key channel for the transfer of outlets or business expansion is inheritance—that is, the transfer of property from father to son. The transition of business through the male line is another distinguishing feature of the family business of Tajik migrants since in the family model they have chosen, a woman plays the role of a housewife and mother. During the interview, it was found that entrepreneurs in this segment are most often engaged in selling dried fruit. This is because many buyers associate Tajiks with selling this particular type of product, which gives the process of buying a certain color. This choice of products is emphasized by the increased demand for Oriental sweets among buyers if Tajik entrepreneurs trade them. According to the interviewed representative of migrants, over many years of business development and market research, he concluded that the trade in dried fruit is the most profitable for his family.

The influence of the diaspora and family ties is expressed in many respects in the fact that when moving and forming a client base, resolving issues regarding the place of trade, and completing a complete package or at least partial documents, it is long-standing entrepreneurs from Tajikistan who can help a novice merchant. An interesting factor influencing this segment of migrants is that the main reason for moving is precisely the desire to financially provide for the family at a sufficient level. It can be argued that the final impetus for moving here is not so much "forcedness" but rather the positive experience of compatriots and the desire to form a business "like others." The constructed hypothesis is emphasized by the fact that the respondent's family members have a higher education, and the respondent himself worked in his specialty in his hometown before moving. This segment of sellers can be attributed to the intelligentsia in the country of origin. The purpose of the migrants' move was to reach a new level of income in the context of the rapid development of business in Kazakhstan's markets. The respondent emphasized the fact that children were gradually introduced to business and taught them the basics of trade. During his father's absence, his son quietly manages the outlets and takes responsibility for making individual decisions regarding the family's future.

The second segment identified in the study is emigrants who have taken over the business from their relatives. A distinctive feature of trade development is moving

away from the flavor of Tajikistan and building relationships with suppliers within Kazakhstan. In other words, the presence of "family" in this business was the original factor in its emergence and has lost its influence over time. This segment is a kind of continuation of the previous one. The choice of location is dictated by the availability of a ready-made option for work and does not imply the need for individual skills. Based on the interview, the author concluded that the majority of migrants in this segment lack higher education, their middle age category, and motivation. Thus, the chosen development path is because the business was built before them, and they only adopted it due to age. In a broad sense, the further development of these migrants' businesses depends not on family ties but on the ability to build relationships with local suppliers or representatives of other cultures. This business format is less colorful but can rightly be called more modern. At the same time, the choice of this type of cooperation is not innovative: the functioning of the bazaars is built in such a way that suppliers themselves offer their services to sellers (Tomashevski & Yaroshenko, 2020).

In the conditions of the development of a market economy, relations with suppliers affect both the pricing policy of the market and the breadth of supply. The supply chain here is built not on the mutual assistance of representatives of the same culture but on the factors of evaluation of one or another potential partner. There is also an age category for these entrepreneurs: it is young sellers who are gradually moving from doing business "the old-fashioned way" and introducing modern solutions to trade in large markets. This format of entrepreneurship allows you to take a broader look at the trading process and analyze new opportunities. Of course, there are certain negative aspects to doing business with strangers. Chief among these is the unreliability and instability of some providers. In contrast to doing business based on "mutual assistance," more business relationships are built here, tied to the financial component. This communication format does not imply any concessions or desire to help each other. Business is conducted solely based on monetary gain.

The third segment identified in the study is entrepreneurs working under the influence of the authoritarianism of the older generation. They have features in common with the second segment analyzed above. However, the motivation to work is built not on the opportunities seen but under the influence of kindred feelings, namely, the duty to the family and the need to help the father in doing business. The age category of these workers ranges from 17 to 35 years old, and higher education is a particular exception in families where parents insist on combining education with work. At the same time, the father in the families of this segment is a respected person for both the heirs and those around him. He successfully runs a business and often combines it with other activities. Thus, the respondent's father has a higher education and works in accordance with his specialty. Often, representatives of this segment are third-generation entrepreneurs and will inherit the business not only from their fathers but also from their grandfathers. This fact is common but not the key one in forming the segment.

Analyzing interviews with a representative of this segment allows us to conclude that family ties have a dual effect on the business process. So, on the one hand, the key motivation is the desire to help, and the decision is made by the respondent on the word of his internal motives. However, at the same time, parents often insist on education or choosing a permanent job for their children. The choice of respondents to continue the family business is made because the transfer of business is possible only to a close relative. At the same time, if preference is given to family ties within the business, then suppliers and partners, as a rule, are local or representatives of other nationalities. This type of business can be considered a combination of the two previous segments with certain features.

A key feature of Tajik migrant entrepreneurship is its highly gendered nature, with businesses typically run by males within patriarchal family structures. Women are largely excluded from direct participation, instead providing domestic labor and childcare. However, some indirect involvement occurs through activities like preparing goods. The three entrepreneurial segments identified in this study revealed differences in gender roles. While males dominate leadership and public dealings in all cases, authoritarian control by elder males is pronounced in the third segment. More research is needed on potential shifts in gender dynamics as younger generations introduce innovations and expanded partnerships.

DISCUSSION

Thus, the segmentation of migrant entrepreneurs formed by the author in one form or another is confirmed by the research of sociologists from all over the world. An important contribution of the study to the analysis of portraits of Tajik migrants is their complexity: the studied reasons for moving and the model of forming a family business cover different age categories and life situations of migrants. This study confirms that, to build a successful business, migrants need the support of relatives both at the initial stage and in the future. An analysis of the selected segments shows that in all analyzed cases, there were family ties, even if, in the future, the business is based on interaction with locals.

Thus, the highlighted first segment is more likely unrelated to forced refugees but results from preparations for the move, emphasizing the large diaspora in the destination city and close family ties. Building a business is based on the help not only of relatives but also of compatriots who trade in the same market or are suppliers of goods. This aspect is analyzed in the studies of M. Baitas (2019, pp. 33–45), T. Holzlehner (2014), and L. Yalcin-Heckmann (2014). The authors' works emphasize the importance of family ties and the need for a cultural background when choosing a place to move to. In addition, the listed sociologists point to the formation of a unified system of the migrant community, which implies helping each other not only in conducting trade but also in the related aspects of transport, official

registration, production, and supplies. Unofficial entrepreneurs often need patronage from an already established business based on cultural ties and belonging to one state (Shcherban et al., 2022). In addition, the findings overlap with the results of the study by H. De Haas (2021), who considered migration processes as part of broader social changes in the environment of migrants. The author's conclusions regarding the choice of food products confirm the studies conducted by H. E. Aldrich and J. E. Cliff (Aldrich & Cliff, 2003, pp. 573–596), who consider the dependence of the speed of business development on the group of goods sold. According to these American sociologists, the sale of "cultural" goods, which in the buyer's subconscious are associated with the nationality of the sellers, allows one to develop business at an accelerated pace.

At the same time, R. Palmer (1984, pp. 89–104) emphasizes that the success of the sale of certain goods by migrants of specific nationalities depends on the quality of the relationships built. An important aspect is the veracity of this scheme. In other words, the products sold by Tajiks, brought from their homeland, are exotic for the Indigenous population, even if there are certain domestic analogs in Kazakhstan itself. The main conclusion obtained by the author during the study is that family ties are a key aspect of doing business by Tajik entrepreneurs in the field of trade at the "Green Bazaar." However, at the same time, the author emphasizes that the influence of this connection may not be permanent and, subsequently, weaken when expanding the business or switching to cooperation with other partners. Modern suppliers themselves are the initiators of the partnership. Many of them are hard-core Kazakhs interested in working with Tajiks. Of course, running a family business by migrants, in all the cases considered by the author, affects the family's welfare and creates new opportunities for several generations to come. This aspect has been studied in the works of Z. Valdez (2011), which emphasize the positive aspects of the influence of family ties. Nevertheless, the opinions of other sociologists emphasize that "There are serious disadvantages associated with the family-run business. Keeping control within the family almost inevitably restricts the size, and especially the complexity, to which it can grow." (Weidenbaum, 1996, pp. 143).

Regarding the second and third segments of migrant entrepreneurs in the "Green Bazaar," pragmatism is at the heart of cooperation with partners. That is, the co-ethnic factor in the case of Tajik ethnic entrepreneurship is not the basis for success, as is usually assumed in studies of ethnic minorities. Relations are built not so much on mutual assistance as on mutually beneficial cooperation, the convenience of finding and hiring workers, easy access to cheap labor, knowledge of a common language, and so on (Yaroshenko et al., 2020). Businessmen are limited in building personal relationships that do not continue in the process of doing business based on commercial interaction. Brednikova & Pachenkov (2002, 74–81) highlight these aspects of the interaction of migrants with representatives of other cultures, especially clearly relegating "ethnicity" to the background. The paradox is that many researchers underestimate the function and place of the family in business

development. At the same time, other studies focus too much on the impact of family relationships without considering innovations in trade and the transition to transnational ties. The importance of the family for the migrants themselves is taken for granted and, in a certain context, defined in the daily practices of business (Amrahov et al., 2023).

For example, in the third segment of migrants analyzed, the authoritarianism of the father or other older generation representatives directly affects the involvement of sons in business. M. Weidenbaum (1996, pp. 141–156) has also studied this phenomenon, emphasizing the negative aspects of such influence. On the other hand, this aspect is rather the result of upbringing, and the very model of the Tajik family influences the decision to continue the family business. The son, realizing he is responsible for the sisters and his future children, decides to continue the family business. During the study, the author determined the structure of income distribution. Regardless of the number of outlets, the family's total income goes to the father, who distributes it according to the family's needs. For example, in British Pakistani business families, the income of individual household members is treated as part of the collective family fund. This is one of the distinguishing features of the "family business" since the money received is not distributed among those who work and is not spent on investments in further business but is distributed among all family members, including non-working women (Babayev, 2022).

The author of the current study emphasizes another important aspect which is relevant to all three segments of migrants is the role of women in the family business. An analysis of interview-narrative data with representatives of different age groups shows that no Tajik families welcome the help of women in organizing trade. The complete non-involvement of mothers, sisters, and daughters is due to other social roles: caring for the family, raising children, and home life. Baines & Wheelock (1998, pp. 16–35) considered a woman's place and role in business. Researchers D. Hangartner, D. Kopp, and M. Siegenthaler (Hangartner et al., 2021, pp. 589, 572–576), in their work, analyzed the level of discrimination against women refugees when hiring in various industries. At the same time, it cannot be argued that a woman does not take part in the family business since she takes on some of the important functions, freeing men to work. In the segment of entrepreneurs, which expands to the production of their own products, women, in addition to the reproductive function and running the household, took part in the stage of "preparing the goods," caring for trees, harvesting, drying fruit, etc.

CONCLUSIONS

The problem of Tajik migration to other Commonwealth of Independent States countries is not new and has long roots. The current state of affairs is largely caused by the migration policy of neighboring countries and the level of development of

the Tajik economy as such. The basis of the study of this article is not so much the historical or economic reasons for the migration of the population but the current state of the issue and the impact of migration on the state of the migrants themselves and their standard of living. The key aspect of the analyzed migration is its compulsion, which cannot but negatively impact entire families and sometimes even communities of migrants. The studies carried out during the writing of this article make it possible to identify how the family business of migrants in a large city is formed and developed, the main factors of influence, and the results of the attempts of individual representatives of migrants. An analysis of the experience of successful entrepreneurs and their path to creating their own businesses makes it possible to identify key challenges on the way to establishing a business and develop ways to solve the main problems of migrants.

According to the interview-narratives, the author studied the state of the family business of migrants who moved to Almaty at different times to do business. Based on the interview, three segments of entrepreneurs were identified, doing business in three different formats. The first are not forced migrants but citizens who want to improve their family's financial situation. Others are migrants who left due to lack of money and run a family business not based on relationships with each other but on cooperation with locals and representatives of other diasporas. The third group of entrepreneurs are businessmen who took over their father's business under the influence of the latter's authoritarianism. During the study, the author traces the influence of family relationships on doing business. The "family nature" of Tajik entrepreneurship is expressed in the overall distribution of the budget, the work of men to provide for women, and family ties within the community. At the same time, during the study, innovations in doing business of the younger generation were highlighted, namely, attracting partners unrelated to Tajiks.

The study revealed migrant entrepreneurship in Kazakhstan as a complex phenomenon shaped by intertwined factors. Family ties and diaspora connections provide critical support for new businesses yet also limit growth and innovation. Patriarchal gender norms exclude women from leadership roles. However, generational differences emerge as younger entrepreneurs build new partnerships and supply chains. The diversity of entrepreneurial paths challenges one-size-fits-all stereotypes about migrant businesses.

In conclusion, the article offers a broader and more detailed description of Tajik migrant entrepreneurs across various age groups and life circumstances. By interviewing respondents and delineating three distinct entrepreneurial categories, this research underscores the intricate interplay of factors such as family connections, generational shifts, gender roles, and collaboration with local communities in influencing migrant entrepreneurial activity. This direction is gradually shifting the integral family business and, in the future, requires further research.

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POVZETEK

ETNIČNO PODJETNIŠTVO: DRUŽINSKA PODJETJA
TADŽIŠKIH MIGRANTOV
Zhuldyz Imasheva

Avtorica v prispevku preučuje etnično podjetništvo tadžiških migrantov, ki vodijo družinska podjetja v kazahstanskem mestu Almaty. Predstavi zgodovinski kontekst migracijskih trendov po razpadu Sovjetske zveze, ki je mnoge Tadžike s kmetijskimi in trgovskimi znanji prisilil v iskanje novih trgov. Sprva je bila njihova glavna destinacija Rusija, v zadnjem obdobju pa se je zaradi spremenjenih politik v Rusiji kot alternativa pojavil Kazahstan. Avtorica se osredotoča zlasti na sedanji položaj tadžiških migrantov v Kazahstanu ter na dejavnike, ki vplivajo na njihova življenja. Obravnava predhodne znanstvene raziskave o vidikih tadžiških migracij, kot so vzroki zanje ter vprašanja diskriminacije. Vendar pa so kompleksni dejavniki, ki trenutno vplivajo na migrantske in etnično podjetništvo, premalo poznani, zato si avtorica prizadeva zapolniti to vrzel s poglobljeno študijo tadžiških migracij v Kazahstan in razvoja družinskih podjetij. Pri tem med drugim uporablja metodologijo pripovednih intervjujev s tadžiškimi podjetniki na »Zelenem bazarju« v Almatyju. Z analizo intervjujev razkriva tri glavne možnosti za podjetništvo, ki jih imajo migranti. Nekateri med njimi niso bili prisiljeni v selitev zaradi ekonomskih razlogov, temveč so odšli, da bi izboljšali družinske finance. Drugi so bili v odhod prisiljeni zaradi pomanjkanja denarja v Tadžikistanu in so ustanovili podjetja, v katerih se ne zanašajo na druge migrante iz Tadžikistana. Tretja skupina migrantov je pod močnim vplivom svojih očetov prevzela že obstoječa družinska podjetja. Ključna ugotovitev prispevka je, da sta za migrantska podjetja značilni kolektivnost in družinska narava. Migranti so s pomočjo družinskih vezi prišli do zagonskega kapitala, delovne sile, stanovanja in blaga. V svojih podjetjih ne skrbijo zgolj za dobiček, temveč je njihova glavna skrb zagotavljanje preživetja družine. Na drugi strani pa mlajši migranti vse pogosteje sklepajo partnerstva tudi zunaj tadžiške skupnosti, s čimer postopoma spreminjajo tradicionalni model. Avtorica zaključuje, da tadžiške migracije zaradi svoje zapletene narave in neprostovoljnih vzrokov zanje negativno vplivajo na družine. Vendar pa migranti s svojim družinskim podjetništvom dokazujejo odpornost, pri čemer so potrebne nadaljnje raziskave o spremembah, ki se dogajajo pri mlajših generacijah migrantov. Prispevek omogoča edinstven vpogled v trenutno stanje tadžiških migracij in razvoj družinskih podjetij, ki se odzivajo na gospodarske potrebe in spreminjajočo se družbeno dinamiko.

A COMPARATIVE ANALYSIS OF FORCED MIGRANTS' RIGHTS ABROAD AND IN UKRAINE AND CONTROL OVER THEIR OBSERVANCE UNDER CONDITIONS OF MARTIAL LAW

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ABSTRACT
A Comparative Analysis of Forced Migrants' Rights Abroad and in Ukraine and Control Over Their Observance Under Conditions of Martial Law
The scientific work aims to determine which rights are provided for forcibly resettled persons in Ukraine and other European countries, identifying common and distinctive features. This study uses various research methods to assess the situation of internally displaced persons in Ukraine, including their legal status, regional distribution, and rights under special conditions. It also investigates Ukrainian forced migrants' main destinations, living conditions, rights to education and employment, and Ukrainian and host countries' social policies on financial aid and housing.
KEYWORDS: internally displaced persons, social policy, migration policy, Russian-Ukrainian war, humanitarian crisis

IZVLEČEK
Primerjalna analiza pravic prisilnih migrantov v tujini in v Ukrajini ter nadzor nad njihovim spoštovanjem v pogojih vojnega stanja
Namen prispevka je ugotoviti, katerih pravic so deležne prisilno preseljene osebe v Ukrajini in drugih evropskih državah, ter pri tem opredeliti skupne značilnosti in posebnosti. Avtorji študije z različnimi raziskovalnimi metodami proučujejo položaj notranje razseljenih oseb v Ukrajini, vključno z njihovim pravnim statusom, regionalno porazdelitvijo in pravicami pod posebnimi pogoji. Obravnavajo tudi glavne destinacije ukrajinskih prisilnih migrantov, njihove življenjske razmere in pravico do izobraževanja in zaposlitve ter socialne politike Ukrajine in držav gostiteljic na področju finančne pomoči in zagotavljanja nastanitve.
KLJUČNE BESEDE: notranje razseljene osebe, socialna politika, migracijska politika, rusko-ukrajinska vojna, humanitarna kriza

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INTRODUCTION

Since the beginning of Russia's full-scale invasion of the territory of Ukraine on February 24, 2022, the majority of the country's population has been forced to leave the occupied territories, as well as the territories where active hostilities are conducted. It is important to understand the legal status such persons have both in the territory of the country of citizenship and in the territory of a foreign country. For example, what are the features of rights and obligations in Poland, Germany, and other countries where Ukrainians are migrating the most? Other scientists and authors have also studied this issue. Thus, for example, Polish authors Paweł Strzelecki, Jakub Growiec, and Robert Wyszyński (Strzelecki et al., 2022) note that the number of forced migrants from Ukraine began to increase since the beginning of 2014 due to the occupation of the Crimean Peninsula and the anti-terrorist operation in Donbas. These authors also emphasize the problem of observing the labor rights of Ukrainian forced migrants on the territory of Poland, which are connected with the problem of official employment, wages, etc. Turkish researchers Armağan Teke Lloyd and Ibrahim Sirkeci note that several stages of migration took place in Ukraine, the last of which coincides with the beginning of the full-scale invasion (Lloyd & Sirkeci, 2022). They also note that some representatives of Ukrainian society intended to leave the territory of Ukraine before the start of the full-scale Russian invasion, considering the turning point in the country's economic well-being. Lloyd and Sirkeci emphasize that in European countries, the legal status of Ukrainian forced migrants includes a wide range of rights and freedoms in the areas of employment and education, etc.

Canadian author Christina Greenaway (2022) notes that Russia's invasion of Ukraine significantly led to an increase in the number of forced migrants from the territory of Ukraine to the territory of Canada and other countries. She cites statistical data that illustrate that as of May 25, 2022, around eight million people are IDPs (internally displaced persons), and around seven million people have left the country. Greenaway notes that the medical area of Canada was not fully prepared for the increase of immigrants; in particular, the country granted more than one hundred thousand temporary visas to Ukrainians. The author also emphasizes that to guarantee the observance of s' healthcare rights, healthcare providers should change their approach and prepare for increased migration. Norwegian authors (Hernes et al., 2022 and others) indicate the problems that Ukrainians who arrived in Norway faced. In particular, according to sociological survey data, the majority of Ukrainian forced migrants indicated insufficient regulation of their rights in the area of obtaining information and access to it. Around 70% of respondents noted this insufficiency. Also, problematic issues arose with law enforcement agencies in Norway and with their lack of awareness regarding the treatment of refugees and IDPs.

A team of authors from Great Britain, including Miller et al. (2022), emphasize the problem of ensuring and guaranteeing the rights and freedoms of forced migrants who entered the territory of countries without obtaining a visa. Thus, they note that

such persons end up in distribution centers to provide them further shelter, but often, such processes are delayed and ineffective, which violates the basic rights and freedoms of displaced people. The analysis of these works provides an idea of the real existence of the problem of ensuring the rights and freedoms of displaced persons in Poland, Germany, etc. However, it is important and necessary to study and clarify the issue of the possibilities of internally displaced persons (IDPs) in Ukraine. The issue of controlling the observance of such rights and freedoms and identifying the spectrum of difficulties that internally displaced persons and persons in need of temporary protection outside the country of citizenship may face is also considered quite narrowly. Therefore, it is advisable to consider and analyze these aspects in more detail and suggest ways to solve the abovementioned issues. Investigating the subject of forced migrants' rights in Ukraine and abroad, particularly under martial law conditions, holds profound significance. Forced migrants, especially those displaced under duress, are vulnerable to rights abuses. Understanding their legal protections is crucial for ensuring that these rights are upheld, respected, and integrated into the humanitarian responses of governments and international bodies. During martial law, the risk of overreach by authorities increases. Research in this area ensures that control mechanisms are in place to prevent potential human rights violations and hold those in power accountable. The comparative analysis of forced migrants' rights under the extraordinary conditions of martial law is pivotal for safeguarding the dignity, freedom, and welfare of displaced individuals, enhancing policy effectiveness, and promoting international legal standards.

The research aimed to investigate the rights afforded to forcibly displaced individuals in Ukraine and across various European nations and to discern the shared and unique characteristics of their legal provisions.

MATERIALS AND METHODS

In the study, we use several scientific knowledge methods. The main method among them is the comparative one, which was used to find similar and different features of the legal status of forced migrants both on the territory of Ukraine and other states. A comparative analysis was carried out on the example of Ukraine and the Czech Republic, Poland, Germany, etc. We compared the categories connected with the observance and guarantee of protecting such persons as particularly vulnerable from security incidents and providing a basic set of social, economic, and political rights and freedoms. The comparative method made it possible to indicate the main differences between the rights and obligations of internally displaced Ukrainian persons and those granted to them by the foreign authorities of Poland, Germany, and other countries. We also used this method to study the protection and observance of basic rights and freedoms of forced migrants in education, labor, and

medicine, distinguish violations faced by such persons, and clarify the issue of ensuring such rights under martial law conditions.

The statistical method made it possible to distinguish the number and dynamics of migrations from the beginning of 2014 and throughout 2022 using open data from the United Nations Ukraine (2022), State Statistics Service of Ukraine (2022), Ministry for Reintegration of the Temporary Occupied Territories (2022), and Ministry of Foreign Affairs of Ukraine (2022). Also, using this method, we defined to which countries the Ukrainian population migrated most often and the most. The statistical method of scientific knowledge illustrated the percentage values regarding the number of Ukrainians who became internal forced migrants and which regions and in what volumes received such persons. By using the appropriate method, we illustrate the results connected with the number of Ukrainian forced migrants in the territories of Poland, Germany, the Czech Republic, and Ukraine; we thus distinguished the migration dynamics during 2014–2022.

The historical method was also used to study the main prerequisites of Ukraine migrations. Thus, most of the migrations are connected with the beginning of military aggression in the east of Ukraine in 2014, the economic decline of the country, as well as the full-scale invasion of Russia into the territory of the Ukrainian state. The historical method helped to distinguish the main prerequisites for the Ukrainian migration. In particular, we paid attention to the full-scale Russia-Ukraine war as the cause of the largest migration. We noted that internally displaced persons are forced to leave their places of residence due to active hostilities and increased levels of danger. Additionally, we used the systematic method, which made it possible to study the reasoning and developments of scientists regarding the issue of the rights and freedoms of forced migrants, compare the stages of this work with the results obtained by other authors, distinguish the main disadvantages and advantages of such developments, and suggest topics for further studies on migration and resettlement of Ukrainians under conditions of war. The systematic method of scientific knowledge and the historical method made it possible to study the causes of Ukrainian migration, particularly by comparing the main events that caused the internal and external migration of Ukrainians.

RESULTS

With the proclamation of martial law in Ukraine under conditions of the Russian offensive, the issue of people who are forced to leave their place of residence is becoming a rather urgent one. Within Ukraine, this aspect is regulated by the special legal and regulatory act: Law of Ukraine No. 1706-VII (2014) "On ensuring the rights and freedoms of internally displaced persons" (2014). In Article 1 of Law, the term "internally displaced persons" is defined as a person who has Ukrainian citizenship, does not have such or is a foreigner but is in the territory of Ukraine on legal

grounds, is recognized as such, and has the right to permanent residence, who was forced to leave their place of residence to avoid negative consequences caused by armed conflict, occupation, violation of human rights and freedoms or technogenic or natural situations. Although such persons leave the borders of their place of residence, the concept is partially identified with the relative concept—of forced migrants. However, they move exclusively within their country's borders and are under its protection, not under the protection of a foreign state, international organizations, etc. It is also advisable to study the concept of "forced migrant" in more detail. The legislator equates these concepts because they have the same features set; they are forced to leave their place of residence and are under the legal protection of their government to change their place of residence within the country.

It should be noted that persons crossing the border of Ukraine due to the abovementioned circumstances are defined as persons in need of temporary protection or those with refugee status. Regarding the interpretation of these concepts, Law of Ukraine No. 3671-VI (2011) "On Refugees and Persons in Need of Subsidiary Protection or Asylum" states that a refugee is a person who does not have Ukrainian citizenship and due to well-founded fears of becoming a victim of prosecution on ethnic, religious, racial, political grounds is outside the borders of the country of which they are a citizen and is unable and unwilling to remain under the protection of such country because of such fears and is unable and unwilling to return to it.

The concept of a person in need of additional protection differs from that of a refugee. It is additionally regulated by the Council Directive 2001/55/EC (2001) "On minimum standards for giving temporary protection in the event of a mass influx of displaced persons and on measures promoting a balance of efforts between Member States in receiving such persons and bearing the consequences thereof" (2001). Regarding the general definition, foreigners and stateless persons forced to seek protection and shelter in a certain country are recognized as such. This status's defining feature is precisely the mass nature and collectivity of the need for external protection caused by occupation, war, etc. In particular, in most cases, Ukrainians forced to leave their country's borders use the status of a person in need of temporary protection (Wypych & Bilewicz, 2022).

We advise distinguishing the main reasons for the collective migration of the Ukrainian population. In particular, this process began in 2014, which was caused by Russian aggression in the east Ukraine, the occupation of parts of the Donetsk and Luhansk regions, and the annexation of the Crimean Peninsula. The same reasons currently exist in 2022, but on a larger scale. Thus, collective migration is caused by missile danger, significant destruction of houses unsuitable for living in the future, critical infrastructure that causes disruptions with heating, electricity, etc., and occupation risk (Korzh et al., 2022). However, it should be noted that in the intervening periods, the Ukrainian population also had the dynamics of crossing the border and changing residence due to individual motives, in particular, dissatisfaction with the Ukrainian labor market, living conditions, etc. Therefore, in contrast

with this way of existence, individuals choose to live in other countries with higher social and economic indicators (Omurzakova et al., 2022). Another reason for resettlement, permanently or temporarily, outside the territory of Ukraine is the signing of the Association Agreement between Ukraine, on the one hand, and the European Union, the European Atomic Energy Community, and their member states, on the other hand (Verkhovna Rada of Ukraine, 2020), one of the consequences of which is the granting of visa-free entry to certain European countries.

Regarding the statistical data on internal resettlement in 2014–2016, according to the UN Refugee Agency, as of September 2014, the total number of internally displaced persons from Crimea and Donbas was 275,695 persons. Already in November, about 445,000 persons left the area of the Anti-Terrorist Operation. Data from the United Nations indicate a slightly higher number at the end of November—490,046 persons. The UN Office for the Coordination of Humanitarian Affairs indicates that as of the beginning of 2015, the number of internally displaced persons was 1,177,000. In 2016, 1,780,946 internally displaced persons were registered (United Nations Ukraine, 2022). However, the statistics do not accurately and fully reflect the real number of IDPs because not everyone applies to social protection authorities and receives such status (Karpachova, 2021a). Regarding the departure to other countries, according to the United Nations Ukraine (2022), as of 2014, around 550,000 persons left the borders of Ukraine, 445,000 of which crossed the border into Russia, 60,000 crossed the border into Belarus, and around 30,000 crossed the border into Poland. In the next year, the total number of refugees and persons in need of temporary or additional protection increased to 760,000.

The largest migration occurred precisely in 2022 when the full-scale invasion of Russia into the territory of Ukraine was launched. Thus, data from the UN Refugee Agency indicate that as of September 2022, around 8.3 million people have left the country, and around half of them are registered in social centers to acquire the status of a person in need of temporary protection (United Nations Ukraine, 2022). Figure 1 shows the main destination countries to which Ukrainians forcibly emigrated in 2022. The data also indicate the number of IDPs—7 million citizens (Ministry of Foreign Affairs, 2022). According to the Ministry for Reintegration of the Temporary Occupied Territories (Ministry for Reintegration, 2022), the largest number of forced migrants is from the eastern regions, in particular, about 2 million in total from the Zaporizhia, Dnipropetrovsk, and Kharkiv Regions; 1.7 million persons moved to the western regions of the country; around 0.7 million persons chose the southern regions as their place of temporary residence; and 2.6 million persons chose the northern and central ones.
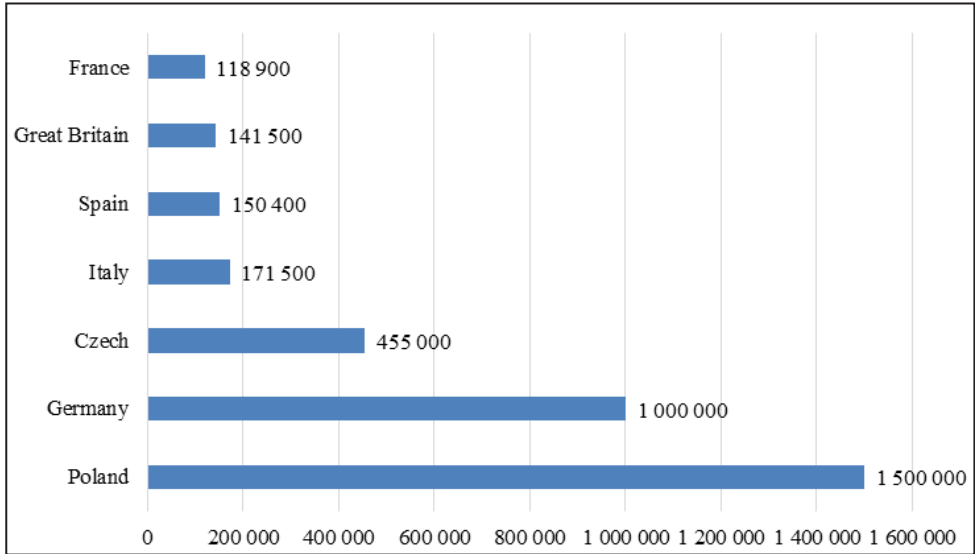
Figure 1: The main destinations and numbers of Ukrainians seeking shelter in foreign countries (source: State Statistics Service of Ukraine, 2022)

It is advisable to find out the legal status of forced migrants, persons in need of temporary protection within the borders of Ukraine, and the main differences between the rights and obligations of the specified categories of persons in Poland, Germany, and the Czech Republic. Thus, refugees and persons in need of additional protection have the same rights as citizens of Ukraine in most areas of social life, particularly in entrepreneurship, freedom of movement, employment, medical, educational, legal, preferential, and family areas. Persons in need of temporary protection in Ukraine have a kind of narrowed set of rights and freedoms. In particular, they are provided with the opportunity for temporary studying and access to work and medical care; the issue of residence is also regulated: such persons may live with persons related to them, in hotels, shelters, etc. (Duszczyk & Kaczmarczyk, 2022a).

We must mention the opportunities available to internally displaced persons. In particular, according to Articles 8 and 9 of Law of Ukraine No. 1706-VII (2014), "On ensuring the rights and freedoms of internally displaced persons" (2014), they have the right to vote during the election process, family unity, access to information about missing family members, conditions of a proper nature for a permanent or temporary place residence, the right to free temporary residence, medical care, education, free travel to a previous place of residence, social benefits, humanitarian assistance, and charitable assistance. Supervision and control over the observance of such persons' rights under martial law conditions is entrusted to governmental authorities, local government bodies, and military administrations. However, there are still a number of problematic issues that only increase under conditions of war. Finding and renting housing is currently difficult for IDPs, considering the rising prices

in the Ukrainian regions that shelter IDPs. At the same time, the controlling bodies do not regulate rent or set fixed or preferential prices regarding this issue (Kumisbekova et al., 2019). However, a positive step has been made toward constructing shelters, apartment blocks, etc., for such persons (Yaroshenko & Tomashevski, 2021).

The next problem for IDPs is employment. Although this right is legally guaranteed, the mechanism for its implementation is ineffective, in particular, because such persons often do not have relevant documents, for example, a certificate of graduation from a relevant professional educational institution or a document confirming the person's labor experience (Zhanbulatova et al., 2020). Considering this, the majority of qualified specialists are forced to choose a job outside of their specialty. Documents are also a significant obstacle for sending children to educational institutions. Although the educational area is quite flexible for internally displaced persons, in particular, benefits, social scholarships, and priority places in dormitories are provided for students (Nesterenko, 2022). It is advisable to investigate the rights of Ukrainian forced migrants seeking protection and shelter outside of Ukraine. Regarding Poland, persons in need of temporary protection have the following basic rights and freedoms on the territory of the Republic: legal stay for eighteen months; stay in shelters and reception centers of forced migrants and refugees; employment opportunity.

Regarding the labor rights of forced migrants, the State Labour Inspectorate controls their observance on the territory of Poland, and the possibility of providing assistance to Ukrainians in finding work through employment centers is also provided. Such persons have the right to conduct business activity in accordance with the necessary procedure, the right to receive free psychological and medical assistance, and access to education, in particular, the arrangement of children in educational institutions, which is also an obligation. Persons who come to Poland for temporary protection have the right to the accrual of social assistance, and such persons are also provided the right to free travel on some trains (Aitymova et al., 2023). To use this scope of rights, citizens should obtain a PESEL (Polish Personal Identification Number). Almost all the rights of forced migrants in Poland parallel the corresponding rights provided to IDPs in Ukraine, except for the right to free travel on railway transport. Thus, in Ukraine, free travel on public transport is only provided if a person uses it to return home (Duszczyk & Kaczmarczyk, 2022b). Germany also provides basic rights and needs in the social, labor areas, etc., to persons in need of temporary protection. However, to use this scope of rights, persons arriving in Germany should apply for a status that allows them to receive accommodation that is not completely free: persons are obliged to pay some utilities; the possibility of living with relatives or acquaintances is also provided, in other cases a person cannot choose their place of residence, the state carries out such distribution; a registered person has the right for the social security, humanitarian assistance, and medical protection (Juric, 2022).

Such a person must obtain a work permit to gain employment (Yaroshenko et al., 2022a). Like in Poland, children must attend school. A comparative analysis reveals minor differences between the legal status of a person in need of temporary protection in Germany and Poland, as well as differences between the Ukrainian provision of the rights of such a person, in particular regarding the allocation to places of residence, mandatory registration in the relevant authorities to obtain a permit engage in labor activity. The legal status of forced migrants in the Czech Republic should be studied as one of the three countries to which most Ukrainians migrated as a result of the war. In particular, registration as a person in need of temporary protection is not mandatory. However, in such cases, Ukrainians are obliged to purchase insurance. They can also apply for housing at the Regional Assistance Center for Ukraine (KACPU) in the Czech Republic. The Czech Republic has created a special website for the Ukrainian population, which contains all the necessary legislative information regarding the legal stay of Ukrainians in the Czech Republic. Free legal, psychological, and medical assistance is provided (provided that a person has medical insurance in the Czech Republic), the possibility of employment, but only in case of obtaining the status of a person in need of temporary protection; travel in public transport is not free. However, it is possible to issue a discount card; as in Poland, transportation of such persons on international trains is free (Juric, 2022).

Analysis of the legal status of persons in need of temporary protection in Poland, Germany, and the Czech Republic allows the conclusion that in all these countries, access to basic needs and legal opportunities in the social, medical, educational, and employment areas is provided. The procedure for accessing such services is different. In particular, the registration procedure with state authorities to obtain the appropriate status is provided everywhere, for example, to have the possibility of employment (De Coninck, 2022).

One formidable impediment to various facets of life, including employment and educational enrolment, pertains to the language barrier. While English serves as one of the world's predominant languages, empirical evidence illustrates that a majority of employers exhibit a predilection for individuals who possess proficiency in the native language of the country (Naka & Spahija, 2022).

Poland and Germany, two primary destinations for forced migrants from Ukraine, have implemented several initiatives to facilitate language acquisition and adaptation for new arrivals. The Polish government and various NGOs offer free or subsidized Polish language courses to forced migrants, which are crucial for day-to-day communication and integration into the job market.

Cultural Orientation programs are designed to help forced migrants understand Polish culture, societal norms, and legal systems, easing their cultural adaptation. Polish schools have initiatives to integrate forced migrant children, including additional Polish language classes to help them catch up with their peers. Information and support centers for forced migrants provide assistance in numerous languages, aiding with paperwork, job searches, and access to services. Some initiatives in

Poland are worth highlighting. For example, the Office for Foreigners (Urząd do Spraw Cudzoziemców, n.d.). This official government portal provides information on integration courses and other services for forced migrants. It is also worth highlighting the Foundation for the Development of the Education System (Fundacja Rozwoju Systemu Edukacji, n.d.). They manage EU programs for education and may have information on language acquisition initiatives.

In Germany, Integration Courses (Integrationskurse) (Bundesamt für Migration und Flüchtlinge, n.d.) are a combination of language instruction and civics courses that the German government provides to help forced migrants learn German and understand the legal system, history, and culture. Germany also has established "Welcome Centers" (Make it in Germany, n.d.) in many cities to provide a one-stop-shop for forced migrants, offering advice, language course placement, and integration assistance. Job Training Programs are offered to help forced migrants learn German language skills specific to their professional fields, which is crucial for career advancement.

Both countries recognize the centrality of language acquisition in the integration process and have, therefore, invested in comprehensive programs that not only teach the language but also facilitate a deeper understanding of societal norms and values, helping forced migrants to become active, contributing members of society.

Regarding the differences between regulating the legal status of such persons abroad and on the territory of Ukraine, it should be said that the list of possibilities for internally displaced persons is much wider. However, there is a problem with controlling the observance of such rights. It consists of an insufficiently developed legislative framework and an ineffective mechanism for implementing the stipulated provisions, for example, in employment and choosing a place of residence. Therefore, it is advisable to review the relevant regulations and declare guarantees that will provide benefits for IDPs renting housing in private legal relations, increasing benefits to landlords who shelter such persons, and providing a real response mechanism to violations of IDPs' labor rights in case of refusal of employment without objective reasons, especially under conditions of martial law.

DISCUSSION

The reasoning and results of Ukrainian scientists and authors from Poland, Denmark, Belgium, and other countries should also be studied regarding the issue of the legal status of forced migrants both in Ukraine and in other countries. For example, Ukrainian authors Ganna Khrystova and Olena Uvarova note statistical data on the number of internally displaced persons worldwide (Khrystova & Uvarova, 2022). Thus, in 2020, there were around 55 million such persons. Ukraine is one of the ten countries with the largest number of IDPs, which is due to the anti-terrorist operation in the eastern regions of Ukraine, as well as the occupation of Crimea and parts

of the Donetsk and Luhansk regions. The authors also emphasize that the majority of internally displaced persons are women, who are pretty vulnerable in this status: the problem of employment, integration into new social relations and place of residence, housing payment, and family maintenance. According to the data provided by Khrystova and Uvarova, women are actively looking for work in the area of work—79%. However, they more often face employment rejections. Such rejections are due not only to the gender and a person's status but also to the family situation: pregnancy and small children. Scientists also emphasize the increased level of danger of human trafficking among internally displaced women and men.

We must consider these results and include them in this paper. The statistical indicators regarding the employment needs of internally displaced persons are particularly important here. Indeed, in Ukraine, there is a gender gap in both employment opportunities and wages (Yaroshenko et al., 2022b). Considering the data of the State Statistics Service of Ukraine (2022) in the second half of 2021, such a gap was around 21%. Thus, it is reasonable to assume that for internally displaced women, such a percentage is much higher because, as was already mentioned, due to the loss of documents confirming the qualifications of a person in a certain area, IDPs lose the opportunity to obtain employment that corresponds to their professional skills. Ukrainian scientist Nina Ivanivna Karpachova (2022b) analyzes the issue of violations causes of human rights and freedoms within Ukraine. Thus, she notes that such violations result from global processes within the country and internationally and distinguishes poverty as the main obstacle to access to the full range of rights provided for by legal and regulatory acts, international terrorism, and the global economic crisis. Within Ukraine, N.I. Karpachova distinguishes the military actions that began in 2014 in the eastern part of the country. Thus, they led to the violation of basic human rights and medical, social, and labor needs, etc. She also focuses on the importance of ensuring and guaranteeing such persons' safety on the part of the state.

N. I. Karpachova's results coincide with the results of our article, particularly regarding the problem of controlling the observance of the rights of persons under martial law conditions. More vulnerable are the forced migrants who have to adapt to life in a new place, obtain employment, etc. (Abudaqa et al., 2019). The increased level of danger caused by missile attacks and military operations also affects the state's ability to guarantee citizens' security (Nurtazina et al., 2015). The team of authors Vitalii Pashkov, Marianna Liubchenko, and Oleksii Liubchenko (Pashkov et al., 2019) focuses on forced migrants' opportunities in the medical area. They note that the observance of the rights of such persons is an important aspect of the state policy. In particular, the authors also note that to guarantee access to medicine, cooperation should take place at the international level. Thus, the activities of the world community should be focused on the development and improvement of declarations and other regulatory acts that would guarantee permanent and unconditional access of forced migrants in all countries to healthcare services (Abudaqa et

al., 2021; Pētersone et al., 2021). Likewise, V. Pashkov et al.'s results coincide with the results of our article because, as already mentioned, in most countries, as well as in Ukraine, free access to medical services, personal insurance, etc., is provided. Indeed, this is important under the conditions of most IDPs in need of temporary protection, as many of them may have physical health problems resulting from shelling, lack of access to medical care, and psychological problems that require attention (Teymurova et al., 2023).

The team of Danish authors K. Klyver et al. (2022) point out the importance of involving refugees, including Ukrainians, in the social life of the country to which they emigrated. After all, such persons have no social capital or financial capabilities and are vulnerable. Thus, the authors emphasize the improvement of other countries' legislation, in the example of Denmark, which will allow Ukrainian refugees to be involved in entrepreneurship, small business, etc., as a way of providing such persons a sense of self-worth and significance in a new environment, to integrate into it in social, economic, and other areas. We agree with K. Klyver et al.'s reasoning because most of their results correspond to ours. Thus, we see that the legislation of the countries (Poland, the Czech Republic, and Germany) expands the opportunities for persons in need of temporary protection in business activity to provide rights regarding entrepreneurship and employment (Sinaj & Vela, 2022). However, in the example of Ukraine, it has been proven that the loss of documents confirming a person's labor experience and qualifications makes it problematic to find a workplace that corresponds to the professional skills of the unemployed person, etc.

Maria Giżewska (2022) emphasizes the consequences of the Russian invasion for the physical and mental health of Ukrainian children. This Polish author points out that the majority of minors and young persons who survived the occupation, military actions, etc., will have anxiety disorders, depression, and other psychological abnormalities as a result. War can also affect the normal development of such persons. In light of Giżewska's results, it is true that a significant number of Ukrainian children suffer from the consequences of the Russian invasion. In particular, data provided by the State Statistics Service of Ukraine (2022), as of the end of October 2022, shows that more than 1,246 children suffered from the armed aggression of the Russian Federation, 429 of them were killed, and more than 800 were injured.

Belgian authors Uri Dadush and Pauline Weil (Dadush & Weil, 2022) emphasize the trend of emigration even before the beginning of the full-scale invasion of the Russian Federation into Ukraine. The authors identify the unstable economy, the occupation of the Crimean Peninsula, and hostilities in the Donetsk and Luhansk Regions as the reasons. Dadush and Weil suggest that European countries contribute to the reconstruction of the country to avoid a future migration crisis due to the Russian invasion. Lebanese scientist Celine Chaaya (2022) emphasizes similar reasoning, in particular, the fact that the psychological health of Ukrainian youth suffered both during the crisis caused by the coronavirus infection and during the Russia-Ukraine war.

Here, we only partially agree with the above authors, particularly regarding the existence of prerequisites for the migration of Ukrainians until 2022. As mentioned in the work, such prerequisites were problems in social security, individual wishes regarding resettlement, etc. However, only helping to reconstruct Ukraine to prevent the migration crisis is not enough. Solving the relevant issue requires a comprehensive approach consisting of humanitarian aid, military weapons for defense and protection, open borders, and an improved program for the reception and resettlement of persons needing temporary protection.

CONCLUSIONS

Through this work, we have clarified the similarity between the concepts of "internally displaced person" and "forced migrant." The legally provided concepts are identical and refer to persons who were forced to leave their place of residence as a result of military operations, occupation, technogenic, natural, or other phenomena that are dangerous to the life and health of a person. The concept of a person in need of temporary protection, which characterizes a person who was forced to leave the territory of their citizenship to seek shelter and protection in a foreign country, turned out to be different from the abovementioned concepts. We have also cited some statistical data. In particular, as of November 2022, the number of internally displaced persons reached 7 million; as of September 2022, the number of persons who crossed the border is 8.3 million. The largest number of internally displaced persons moved from the eastern regions. People were most often forcibly moved to the following countries: Poland, the Czech Republic, Germany, France, Great Britain, etc.

We have also indicated the legal status of such persons. In particular, within Ukraine, displaced persons have a full range of legal opportunities and freedoms in all areas of public life, including the right to vote, distinguishing internally displaced persons from persons in need of temporary protection abroad. The main problems accompanying the integration of internally displaced persons into a new environment are distinguished. Thus, most of them are connected to the search for housing, obtaining employment, and placing children in educational institutions. The need to improve the legislation regulating displaced persons' legal status to improve the mechanisms of supervision and control over the observance of their rights and freedoms was emphasized. It was also found that the legal status of persons in need of temporary protection in Poland, Germany, and the Czech Republic is almost identical. Thus, in the mentioned countries, individuals have the right to shelter, social assistance, employment, and medical care. For further studies, it is advisable to consider the following issues: human trafficking as a risk for persons crossing the border in search of a shelter, return of temporarily displaced persons to the country of citizenship, sociological study, state support for forcibly displaced persons, and reconstruction and benefits.

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POVZETEK

PRIMERJALNA ANALIZA PRAVIC PRISILNIH MIGRANTOV V TUJINI IN V UKRAJINI TER NADZOR NAD NJIHOVIM SPOŠTOVANJEM V POGOJIH VOJNEGA STANJA
Oleg Yaroshenko, Volodymyr Harashchuk, Olena Moskalenko, Galina Yakovleva, Vitalii Svitlychnyi

Ruska invazija na Ukrajino je vplivala na povečano število migracij tako znotraj države kot v tujino, zaradi česar je bilo treba nujno nasloviti vprašanja pravnega statusa teh oseb, določitve njihovih pravic in obveznosti na novih ozemljih ter zagotavljanja njihove zaščite. Cilj prispevka je ugotoviti, katere pravice Ukrajina in druge evropske države zagotavljajo prisilno preseljenim osebam, ter pri tem opredeliti skupne značilnosti in razlike med njimi. Avtorji so za pripravo prispevka uporabili primerjalno, sistematično, zgodovinsko in statistično znanstveno metodo. V prispevku pojasnijo pravni status notranje razseljenih oseb v Ukrajini ter predstavijo statistične podatke o številu notranje razseljenih oseb v različnih ukrajinskih regijah. V prispevku so predstavljeni nadzorni organi, pooblaščeni za spremljanje in nadzor spoštovanja pravic in svoboščin notranje razseljenih oseb pod pogoji uvedbe njihovega posebnega pravnega statusa na ozemlju Ukrajine. Avtorji ugotavljajo, v katere države se je izselilo največ ukrajinskih prisilnih migrantov, v kakšnih razmerah živijo v določenih državah ter kakšne pravice imajo na področju izobraževanja in zaposlovanja, analizirajo pa tudi socialne politike Ukrajine in drugih držav, zlasti kar zadeva zagotavljanje finančne pomoči, nastanitve itd. Rezultati študije bodo lahko v pomoč zgodovinarjem, pravnikom in sociologom pri nadaljnjih študijah o socialnih politikah v Ukrajini ter v evropskih in drugih državah. Avtorji predstavijo pravice razseljenih oseb v Ukrajini in izpostavijo njihov dostop do širokega nabora zakonskih pravic in možnosti v javnem življenju, vključno z volilno pravico, po katerih se razlikujejo od tistih, ki prejemajo začasno zaščito v tujini. Opredelijo ključne izzive v procesu integracije, zlasti na področjih nastanitvijo, zaposlovanja in šolanja otrok. Pri tem poudarjajo, da je treba dopolniti zakonodajo, ki ureja pravni status razseljenih oseb, ter izboljšati nadzor in uveljavljanje njihovih pravic. Ugotavljajo tudi, da je pravni status prosilcev za začasno zaščito v Ukrajini v veliki meri enak kot na Poljskem, v Nemčiji in na Češkem. Zakonodajalci bi lahko priporočila iz prispevka uporabili za dodatno izboljšanje pravnega in regulativnega okvira na področjih socialne politike in politike ponovnega vključevanja.

MIGRANT ISSUES IN CONTEMPORARY JAPAN

Aigerim Adilgazinova,[I] Lyailya Balakayeva,[II] Mara Gubaidullina[III]

ABSTRACT
Migrant Issues in Contemporary Japan
Japan has an interesting and ambivalent policy toward the migration process; therefore, it is interesting to examine the migration position of a mono-ethnic state, which has also had a history of "closure" and exclusion from the outside world. The research objective is to examine the characteristics of immigration processes in contemporary Japanese society. The research methods used include narrative, comparative, analytical, and structural. As a result, it can be argued that the legislative framework is important in dealing with migrants, which in Japan is recognized as highly effective; in general, the mechanism formed by the Japanese government for dealing with the migrant population copes with all its tasks. In the course of the work, the main problems of adapting to life in Japan were identified, which are the focus of the governing authorities.
KEYWORDS: workers, Asian labor market, social security and health insurance, economy, emigration

IZVLEČEK
Migrantski izzivi v sodobni Japonski
Japonska ima zanimivo in ambivalentno politiko do procesa migracij, zato je zanimivo preučiti migracijski položaj te monoetnične države, ki ima tudi zgodovino »zaprtosti« in izključenosti iz zunanjega sveta. Cilj v prispevku predstavljene raziskave je preučiti značilnosti migracijskih procesov v sodobni japonski družbi. Avtorice so pri tem uporabile pripovedno, primerjalno, analitično in strukturno raziskovalno metodo. Kot kažejo rezultati, je pri obravnavi migrantov pomemben zakonodajni okvir, ki na Japonskem velja za zelo učinkovitega; mehanizem, ki ga je vzpostavila japonska vlada za obravnavo priseljencev, na splošno opravlja vse svoje naloge. Med njegovim delovanjem so bile opredeljene glavne težave pri prilagajanju na življenje na Japonskem, na katere se osredotočajo vladni organi.
KLJUČNE BESEDE: delavci, azijski trg dela, socialna varnost in zdravstveno zavarovanje, gospodarstvo, emigracija

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INTRODUCTION

In the current context of open international dialogue and globalization worldwide, millions of people are moving across different state borders in search of better living conditions, so migration has become a global phenomenon. It has certain social, economic, and political implications for the entire world and, therefore, has an important place in international relations. The topic is particularly interesting in light of Japan's active involvement in the global migration cycle, as the rising sun is currently quite an attractive territory for immigrants. Migration to Japan should be seen as a complex social and economic phenomenon. Currently, there is no single theory of migration. For example, migration can be analyzed based on such classical theories as Ravenstein's (1885) theory, Lee's (1966) "push-pull factors" model, Dunkan's (1940) "Theory and Consequences of Mobility of Farm Population," and Zelinsky's (1971) concept of migration transition. Ravenstein (1885), in his theory, formulated such fundamental laws of migration that correspond to the present situation in Japan:

- the population is distributed among the territories;
- the regions differ mainly in their economic characteristics;
- most migrants move short distances;
- migration takes place in stages;
- each migration "flow" corresponds to the opposite "flow";
- migrants travel long distances to large industrial and commercial centers;
- urban residents are less mobile than rural residents;
- women are more mobile than men in internal migration, and men are more mobile than women in long-distance migration;
- large cities develop mainly through migration;
- the volume of migration increases with the development of industry, trade, and transport;
- the main causes of migration are economic.

According to the "push-pull factors" model by Lee (1966), different migration factors operate in each territory: retention, pull factors, and push factors. Determining arrivals and departures, with some factors affecting most people and some affecting only certain individuals. Lee (1966) was among the first to describe the factors influencing migration processes. Push factors can be economic, social-political, and natural circumstances. Economic factors are unemployment, low wages, high taxes, unstable labor market; social and political factors are poverty, discrimination, infringement of rights, restrictions on freedom of speech and religion, and war (Tomashevski & Yaroshenko, 2020). The factors that attract migrants are usually high economic development, high wages, security, and the opportunity to get a job (Shebanina et al., 2022). Applying Lee's (1966) migration theory to the Japanese situation, pull

factors such as a stable economic situation on the domestic and foreign markets, security, and labor market demand work to a greater extent.

Dunkan (1940), in his book "Theory and Consequences of Mobility of Farm Population," presented a theory of mobility of the agricultural population. His theory combines microscopic and macroscopic active forces in the migration process. According to him, whatever effects change in structural factors cause in a country, the same effects are caused by migration. Thus, migration is a functional alternative to social change for many structural goals. Generally, migration is influenced by the following factors: economic and technical reasons, social reasons, personal reasons, natural reasons, and other reasons (Kerimkulov et al., 2015).

Zelinsky's (1971) concept of migration transition formed five stages of the migration transition process. The first stage was called primitive traditional society. It was accompanied by migration at a minimal rate for a change of habitat or a change in everyday conditions (land use, trade, military affairs, or religious rituals). The second stage was the early mobile society. It was accompanied by mass migrations from rural to urban areas, settlement of undeveloped land, emigration to available countries, and small immigration of skilled workers from other countries. The third stage was the later mobile society. A weakened but continuing process of movement from villages to cities, a decline in emigration. The fourth stage is the developed society, in which the mobility of citizens declines, and migration from city to city has taken over. Large numbers of low-skilled workers immigrate from less economically developed countries, a significant jump in international migration. The final fifth stage is an overdeveloped society in which migration is decreasing. This migration is restricted by strict government control. Therefore, a historical evolution in the development of population movement can be traced. All five stages of this theory can be traced in Japan's migration history (Davis & Ikeno, 2008).

The research aim is to examine the characteristics of immigration processes in contemporary Japanese society. The research objectives are to reveal the government's policy in regulating migration processes and consider the process of adaptation and integration of immigrants in Japanese society, that is, the social aspect and the labor market.

MATERIALS AND METHODS

The research methods used include narrative, comparative, analytical, and structural. The narrative method involves presenting a coherent story or chronological sequence of events. In the context of immigration policies in Japan, this method was used to outline the historical evolution of these policies. It helps understand how Japan's immigration approach has transformed, highlighting key turning points, policy shifts, and the factors that prompted these changes. For immigration policies in Japan, the analytical method was used to dissect various aspects

of the policies, such as economic impacts, social integration, legal frameworks, and public attitudes. In the context of immigration policies, the structural method was used to analyze the institutional framework for formulating and implementing policies in Japan. It can delve into the roles of government agencies, legislative bodies, advisory boards, and international collaborations that shape immigration policies. Overall, the synergy of narrative, comparative, analytical, and structural methods provides a holistic perspective on immigration policies in Japan, enabling researchers to unravel the topic's complexities and offer valuable insights for policy considerations and future studies.

In the course of the work, such documents were used, such as migration legislation of Japan and Kazakhstan; statistics from the database of the Immigration Services Agency of Japan (2022; 2023); materials of the Census of Japan 2020; Japanese Ministry of Justice (2023) survey among foreigners on discrimination experienced; Pew Research Center survey (Stokes & Devlin, 2018), survey of the Japanese news agency Jiji Press (2019). The works of Russian scholars devoted to migration processes in Japan by Shevtsova (2009), Vasilieva (2010), Pavlyatenko (2008), Markaryan (2012), Matrusova (2016), Molodyakova (2002), Streltsova (2018), Avetisyan (2016), Karpova & Karpov (2019) were also used.

English language contributions include the "Labour Situation in Japan and Its Analysis: General Overview 2015/2016" (The Japan Institute, 2016), "Foreign Workers in Bubble and Post-bubble Economy in Japan" (Mori, 1999), "Bucking a Global Trend, Japan Seeks More Immigrants. Ambivalently" (Rich, 2018), "J. League and media must show red card to racism" (Arudouj, 2014), "Japan racism survey reveals one in three foreigners experience discrimination" (Hurst, 2017), "Kurdish case becomes rallying cry for Japan protest against police" (Saito, 2020), etc.

RESULTS AND DISCUSSION

Historical Context of Japanese Emigration

Migration processes are not new to Japan; they occurred even in ancient times. For example, there is evidence that there was massive migration from the Korean peninsula to the Japanese archipelago during the Yayoi period (third century BC–third century AD), with the number of migrants reaching about 1.2 million people (with a total population of about 6 million people at the end of the 8th century) (Zhukov, 1998). Immigrants from the mainland became the agents of Chinese polity, writing, and other cultural manifestations in the Japanese world. In addition to the Chinese and Koreans, the first Europeans arrived in Japan in the second half of the sixteenth century, resulting in the "Christian Age," characterized by widespread Christianity in the country. In 1600, the first Dutch arrived in Japan, and the Japanese subsequently developed strong commercial and cultural ties with the Dutch. From 1639 to 1853,

Japan had a policy of isolation during which any contact with the outside world was restricted. However, the isolation was not absolute, as the Japanese had trade contacts with the Dutch through the port of Nagasaki and had relations with the Koreans and the Ryukyu Islands (Vorobyov, 1980; Vasilieva, 2010).

The forcible opening of the country to the outside world in 1853 opened the borders to the Japanese and led to mass emigration to foreign countries. A large number of foreigners, in particular Europeans, were immigrating to Japan, and internal migration was also increasing due to the onset of urbanization. Before the World War I, Japan was a major labor supplier abroad. Emigration was economically motivated: the country was undergoing rapid industrialization, and the poorest people in the countryside were moving in large numbers to the cities or, having failed to find work there, to other countries that were open for the first time (Bozorgmehr & Díaz, 2022). The number was as high as 10,000 a year. Coming from the countryside, they sought refuge where they could get land. As long as they were welcomed in the United States of America (USA) and Canada, the Japanese settled in those countries and later in Latin American countries, especially Brazil, where they formed a large diaspora. In the city of Sao Paulo, for example, it eventually reached 1 million people. After World War I, emigration from Japan to these countries declined considerably and, in the 1930s, was redirected to Sakhalin, Manchuria, and other territories closer to Japan and taken from other countries at this time (Markaryan, 2012; Matrusova, 2016).

During the occupation period, Japan ceased to have colonized regions from which the Japanese returned. During this period, migration was taken under strict control, and the first bodies and laws to regulate migration processes were formed. After the period of occupation, Japan was on the road to regaining the status of a world power. This period (from 1951 to 1971) saw the completion of the restoration of the national economy and finding its place in the international arena. As Japan entered a scientific and technological race and began to apply its innovations in production, companies began to experience labor shortages. In order to solve this problem, the government began to actively pursue urbanization, and, as a consequence, the level of internal migration increased (one-third of the peasantry moved to the cities). Also, during this period, Japan has been locating its production facilities in the Asia-Pacific region, establishing economic and political ties with them and exchanging human resources between countries, which has contributed to increased migration processes. After the structural adjustment of the Japanese economy following the energy crisis during 1973–1974. The country began to experience labor shortages, and there was a need for immigrants. In 1981, Japan acceded to the United Nations Convention on the Status of Refugees. The conditions for entry into the country are made easier for professionals, but at the same time, the entry of unskilled workers is restricted.

Evolution of Immigration Policies

The policy of attracting highly qualified specialists has prevailed since the 1990s and up to the present day. The Japanese Migration Service grants foreigners 28 residence statuses in Japan, sixteen allowing them to perform permitted work activities (Shevtsova, 2009). The Japanese government's strategy for the immigration movement has three directions. The first is recruiting students and trainees; this type of immigration was conceived as an element of transferring new technologies to developing countries. The second is for the descendants of Japanese emigrants: the Japanese government grants them some facilitated entry into the country and employment. The third direction is used by irregular migrants, who enter on tourist visas and then stay to work—they are being actively dealt with, fined, and deported (Streltsova, 2018). Japan's population has remained ethnically homogeneous for quite a long time: the number of foreigners in the territory has not exceeded 1%. However, due to changing economic and social conditions (demographic crisis, labor shortages, and globalization processes), the government has had to modernize its migration legislation and allow more foreigners into the country. At the moment, the ethnic and racial composition of the country is as follows: Japanese—98.5%, Koreans—0.5%, Chinese—0.4%, and others—0.6%. There are currently 2,951,365 officially registered immigrants in Japan. Detailed statistics can be seen below in Table 1.

Asia		Europe		Africa		North America	
2,449,373		**79,066**		**17,710**		**75,953**	
Country	**Total***	**Country**	**Total ***	**Country**	**Total***	**Country**	**Total***
Afghanistan	3,482	Albania	102	Algeria	252	Antigua and Barbuda	9
Armenia	59	Andorra	3	Angola	87	Bahamas	22
Azerbaijan	156	Austria	684	Benin	137	Barbados	38
Bahrain	45	Belarus	380	Botswana	78	Belize	9
Bangladesh	17,757	Belgium	996	Burkina Faso	163	Canada	10,949
Bhutan	514	Bosnia and Herzegovina	58	Burundi	35	Costa Rica	233
Brunei	64	Bulgaria	502	Cameroon	1,127	Cuba	341
Cambodia	16,898	Croatia	161	Cape Verde	14	Dominica	17
China	801,357	Cyprus	53	Central African Republic	26	Dominican Republic	972

East Timor	36	Czech Republic	459	Chad	4	El Salvador	156
Georgia	81	Denmark	630	Comoros	3	Grenada	5
India	40,798	Estonia	165	Côte d'Ivoire	205	Guatemala	178
Indonesia	67,051	Finland	716	Democratic Repu-blic of the Congo	564	Haiti	43
Iran	4,289	France	14,046	Djibouti	30	Honduras	161
Iraq	255	Germany	7,263	Egypt	2,315	Jamaica	992
Israel	702	Greece	406	Equatorial Guinea	5	Mexico	298
Jordan	246	Hungary	774	Eritrea	52	Nicaragua	101
Kazakhstan	524	Iceland	50	Ethiopia	506	Panama	91
Kuwait	89	Ireland	1,285	Gabon	58	Republic of Trini-dad and Tobago	188
Kyrgyzstan	631	Italy	4,695	Gambia	102	Saint Lucia	8
Laos	2,973	Latvia	137	Ghana	261	St Vincent	6
Lebanon	183	Liechten-stein	10	Guinea	502	St. Kitts and Nevis	12
Malaysia	10,996	Lithuania	342	Guin-ea-Bissau	12	USA	61,124
Maldives	60	Luxem-bourg	63	Kenya	835	**South America**	
Maldives	60	Malta	29	Lesotho	31	**274463**	
Mongolia	13,601	Moldova	181	Liberia	68	**Country**	**Total***
Myanmar	3,506	Monaco	2	Libya	95	Argentina	3,105
Nepal	97,966	Montenegro	10	Madagas-car	163	Bolivia	6,118
North Korea	436,791	Netherlands	1,458	Malawi	139	Brazil	211,495
Oman	50	Northern Macedonia	51	Mali	217	Chile	1
Pakistan	19,156	Norway	496	Mauritania	32	Colombia	2,545

Palestine	85	Poland	1,598	Mauritius	161	Ecuador	251
Philippines	292,649	Portugal	655	Morocco	710	Guyana	22
Qatar	71	Republic of Kosovo	21	Mozam-bique	143	Paraguay	2,176
Saudi Arabia	723	Romania	2,404	Namibia	40	Peru	48,613
Singapore	3,168	Russia	10,427	Niger	28	Suriname	7
South Korea	27,695	San Marino	1	Nigeria	3,439	Uruguay	130
Sri Lanka	29,517	Serbia	274	Republic of Congo	49	Venezuela	611
Syria	951	Serbia and Montenegro	4	Republic of South Sudan	39	**Oceania**	
Taiwan	60,449	Slovakia	321	Rwanda	103	**15,415**	
Tajikistan	230	Slovenia	115	Senegal	1,039	**Country**	**Total***
Thailand	54,999	Spain	3,722	Sierra Leone	65	Australia	11,018
Turkey	7,058	Sweden	1,695	Somalia	27	Fiji	317
Turkmeni-stan	64	Switzerland	1,226	South Africa	1,133	Kiribati	8
United Arab Emirates	148	Ukraine	2,075	Sudan	364	Marshall	35
Uzbekistan	3,686	United Kingdom	18,317	Swaziland	7	Micronesia	66
Vietnam	427,367	Vatican City	4	Tunisia	806	Nauru	6
Yemen	137			Uganda	942	New Zealand	3,548
Stateless				Zambia	240	Palau	45
666				Zimbabwe	257	Papua New Guinea	64
						Samoa	79
						Solomon	39
						Tonga	186
						Tuvalu	4
						Vanuatu	14

Note: * Total number of registered immigrants

Table 1: Registered immigrants in Japan (source: Immigration Services Agency of Japan, 2022).

Regarding gender composition, there are slightly more women: 1,425,043 men and 1,460,861 women. Regarding age composition, men outnumber women in the more working age range (from 20 to 35 years old). However, the quantitative difference favors women from 0 to 19 years old and from 36 to 80 years old. Foreigners' three main residence statuses are permanent residence—780,000, vocational training—370,000, and study abroad—340,000. Of the total number of foreigners, 1.46 million are foreign workers. The top three in terms of residence status are 500,000 based on their status (permanent residence, marriage, etc.), 340,000 unqualified (study abroad, etc.), and 310,000 in technical apprenticeship (Immigration Services Agency of Japan, 2022). To facilitate the compilation of statistics on external migration, foreigners fill in an 18-question questionnaire that includes name, sex, date and place of birth, nationality, status, occupation, passport number, date of issue, period of residence, place of residence, place of occupation, info on family members and relatives. Migrants have been drawn to countries with a high standard of living, including Japan. A high standard of living implies a developed economy and medicine, a high level of education, science, salaries, and other factors (Komilova, 2021). The policy of isolation from other countries, which was in force from 1641 to 1853, determined the attitude of the state structures toward immigration, and thanks to that policy, the culture and traditions of Japan were preserved. In this context, studying the experience of Japanese migration control authorities is useful for better understanding and improving national legislation (Kuzmin & Yurkovskiy, 2016; Karpova & Karpov, 2019).

After the forcible opening of the country by the Western powers and the declaration of the Meiji Restoration, the Japanese government faced the rather important task of forming bodies that would represent the executive, administrative, legislative, and judicial powers. Hence, in 1871, the Japanese Ministry of Justice was formed, and immigration authorities began to be established. D. MacArthur tried to change Japan's legal system to democratize its society; his efforts and endeavors were successful. As a result, the Constitution of Japan was adopted in 1947, and it is still relevant today. In 1950, an immigration agency was established under the Ministry of Foreign Affairs; in 1951, an "Immigration Control Order" was enacted, and in 1952, the Foreigners' Registration Act was adopted and came into force. At that time, the foreign national policy focused on the permanent ethnic Koreans and Chinese "Zainichi" residing in Japan. In the mid-1960s, industry began to conscript and admit unskilled workers because of labor shortages. However, under the First Basic Employment Measures Plan (1967), foreign workers were not allowed into the country, making these unskilled workers' presence in the country illegal. This principle was maintained in the Second (1973) and Third Basic Employment Measures Plan (1976). In the late 1970s, the number of refugees from Indochina, foreign women from Southeast Asia, second- and third-generation Japanese displaced to China during World War II, and Europeans and North Americans coming to Japan for business increased. When the yen appreciated markedly after the "Plaza" Agreement

was signed in 1985, Japanese companies expanded overseas, mainly into Southeast Asia, and one of the consequences of this was the emergence of the problem of "industrial displacement" in Japan. Around the same time, there was an increase in the number of *nikkeijin* immigrants (emigrants from Japan and their descendants) from South America and foreign workers from Asian countries who came to Japan in search of work (Matrusova, 2016).

The Sixth Basic Employment Measures Plan (1988) divided foreign workers into "professional and technical workers" and "unskilled workers". The policy adopted for these two categories was to facilitate the immigration of professional and technical workers and, as far as possible, to accept unskilled workers in a limited and careful manner. Under this policy, the Immigration Control and Refugee Recognition Act was revised in 1989.

Shifting Immigration Policies in the 1990s to Present

The changes came into force in 1990, when a new residence status, "trainee," was introduced for foreigners. In response to the Second Report of the Third Special Advisory Council for the Enforcement of Administrative Reform in 1993, the "Foreign Worker Vocational Training System" was established, and the residence status system under which foreigners were allowed to live in Japan was further developed. As Japan's economy became mired in deflation following the bubble's collapse in the late 1990s, Japanese manufacturers continued to shift their production operations to other countries. Overseas, the Chinese economy gained prominence, and international competition intensified. During this period, an increasing number of *nikkeijin* and other foreign nationals took non-permanent jobs. Partly because of the relaxation of requirements for permanent residence permits in 1998, foreign workers who had initially come to Japan as temporary "guest workers" increasingly began to stay for long periods (The Japan Institute, 2016). As more foreign nationals settled permanently, the number of young foreigners also increased. With this, the problems of foreign workers took on a new character, now including not only employment and work but also domestic and other social problems (Chernobay et al., 2022).

The Anti-Employment Act was amended in 2007 to oblige the government to take action. For example, the Government was required to promote the employment of foreign nationals in specialized technical fields, to take measures to promote the proper management of the employment of foreign workers and the re-employment of those who quit their jobs, to take measures to prevent the illegal employment of foreign workers and to improve employers' management of the employment of foreigners (Decree of the Ministry of Justice, 1990). The simultaneous global recession of the autumn of 2008 also left a deep mark on the employment of foreign workers. Unemployed foreign nationals visited "Hello Work" centers (employment service centers) in search of work, but very few were able to find work. Some foreign

nationals not enrolled in social security or unemployment insurance found themselves unprotected by social protection programs and were stranded. In 2009, the Immigration Control and Refugee Recognition Act was amended, and "technical apprenticeship" was established as a new residence status. The Act was amended again in July 2012, along with other legislation. This repealed the Aliens' Registration Act and introduced a new residence management system.

Meanwhile, with the expansion of overseas businesses and international transactions, attracting and securing global human resources has become an urgent task for corporate interests. The number of companies hiring foreign students and recruiting foreign staff has gradually increased. Since May 2012, highly skilled foreign professionals have enjoyed preferential immigration treatment based on a point system as part of a government campaign to encourage the admission of such personnel. In 2014, the Japan Renaissance Strategy was announced. It included the recruitment of talented foreign skilled labor, the use of foreign labor in construction and shipbuilding, the adjustment of technical training and skill development programs for foreign trainees, the admission of foreign employees to manufacturing companies, support for the employment of foreign students in the medical field, and, in particular, home care for the sick and elderly. The strategy calls for caution to avoid confusion between the foreign recruitment policy and the immigration policy (Abe, 2013).

In 2012, Japan underwent a revival program to increase the annual number of tourists to twenty million. Certain measures were taken to achieve the goal, in particular, to make it easier to obtain a visa or to abolish the visa regime altogether. One example of implementing this process is that 19,690,000 tourists came to Japan. Compared to 2014, the number of tourists exceeded by almost six million. This beats a new challenge for the state as part of increasing the number of workers in the migration department. The Migration Service has added 162 employees to its ranks in order to carry out the work of controlling arrivals to the country. Most people arriving in Japan from different countries fly into the country's biggest airports. The number of migration officers has increased at airports such as Narita, Haneda, Chubu, Kansai, and Naha.

Migration relations were established by the Immigration Control and Refugee Recognition Act (Decree of the Cabinet of Ministers, 1951). This Act aimed to control the exit and entry into the country. In order to realize this objective, it was necessary to maintain a balance between deporting migrants and accepting people of other nationalities coming into the country. Entry into Japan can be refused to aliens on fourteen grounds specified in the Act. An entry permit may be granted before or after entry. An entering foreigner intending to work must certify that he or she meets the conditions for working residence status included in the lists annexed to the Act. The Act established residence statuses for foreigners, defining permissible activities for each. Over time, a growing influx of foreigners has come to work in Japan. This was facilitated by changes in the economic situation in Japan's domestic

and foreign markets. It became necessary to update the 1951 Law to regulate modified labor immigration.

Role and Structure of the Japanese Immigration Authority

Thus, in 1990, a new Immigration Control Law (Cabinet Order No. 319, 1990) was drafted, which changed the conditions of the employment system for foreign workers. It was mainly aimed at facilitating entry, tightening measures against illegal labor activities of foreigners, and setting certain requirements for foreign workers. The law also defined a clear structure, duties, and rights of the migration authority—the Immigration Bureau of the Ministry of Justice. The task of the Immigration Bureau is to prevent terrorist acts and attempts to enter the territory of the state illegally. The Immigration Bureau of Japan is a department of the Ministry of Justice. Its task is to regulate the movement of migrants within the limits of the law. It consists of several divisions headed by a director general. One of the aims of the immigration office is to regulate the movement of foreigners. The office consists of seven divisions with their own aims and tasks. The first division has the task of regulating the bureau's work, including the remaining divisions. The second division aims to assist refugees and to assign them their status. The third keeps statistics on foreigners and deals with their registration. The fourth exists to combat illegal immigrants. The fifth monitors migrants' orders. The sixth division deals with litigation and legal proceedings against foreign nationals who break the law. The last division helps find accommodation and employment and deals with education. In addition to the main section, the immigration authority has regional bureaus and immigrant advice centers. All of the offices are located in the individual regions. The staff at the Bureau for Immigration have a great deal of work to do with foreign nationals (The Japan Institute, 2016).

According to information from the Organisation for Economic Co-operation and Development's International Migration Database (OECD.Stat, 2017), Japan ranked fourth in terms of growth in the number of foreign residents in 2015 and 2016. The government is seeking to increase this type of migration even further by creating a new visa status for workers, for which a cabinet commission has been set up. Prime Minister Abe Shinzo spoke of the need to create a system to accommodate different workers from other countries who can start work immediately (Abe, 2013). Many local governments are working to integrate foreign residents into Japanese society. For example, the city of Akitakata in Hiroshima Prefecture has been actively working to attract foreigners since 2010. Mayor H. Kazuyoshi commented: "The way for municipalities such as ours that are suffering from depopulation to survive is to attract the attention of people around the world. Now is not the time to say, 'I can't live with foreigners.' We need to learn how to create a successful multicultural community" (Serisawa, 2018). According to the influential *New York Times*, the measure is a remarkable turnaround for Japan, which has surprised the world. The country, which

once embraced big restrictions on immigration, is now reluctantly moving in the other direction and beckoning foreigners into the country (Rich, 2018).

The Japanese government is looking for other ways to attract foreigners, such as studying. For example, over the past ten years, the government has adopted a plan to attract about three hundred thousand foreign students, but the plan has been exceeded (Nebashi, 2017; Stokes & Devlin, 2018). What are the reasons? Initially, the question was only about the image of Japan, i.e., "to make Japan a more open country, to promote cultural exchange by creating an environment that would attract foreign tourists." The first setback to the plan came when the government allowed students to work part-time. By law, people with a student visa can work up to twenty-eight hours a week, and during holidays, they can work up to forty hours a week, which is very different from the world's norms for part-time work. For example, in the United States or Canada, people with a student visa cannot have a job at all (Palmer & Drbohlav, 2022). Therefore, the Japanese government expects students to become part of the workforce while studying here, as the country is experiencing an acute labor shortage due to a shrinking population. More than 90% of foreign students are employed in some kind of job while studying in Japan. Still, Japan is gradually making it easier for migrant workers to enter (BBC News Japan, 2018). In December 2018, the upper house of parliament passed amendments to the law concerning migration policy. Thanks to the new visa system, hundreds of thousands of migrants were able to come to Japan, where there are very few foreigners, in 2019. The easing applies primarily to areas with a particular shortage of workers: construction, agriculture, and care for the sick and the elderly (BBC News Japan, 2018). Hence, the Japanese government is trying to attract as many immigrants to the country as possible, as their employment is directly linked to the Japanese economy.

Recent Trends and Challenges in Immigration

Forming a strategic direction for social security is important in building a modern welfare state because infrastructure development often determines the standard of living and quality of life (Molodyakova, 2002; Abdulkabatova, 2010). Therefore, social welfare becomes a key topic when considering any aspect of society. Immigration is a key issue on Japan's political and economic agenda, so it is important to define the place of immigrants in the country's social infrastructure. Social welfare systems in Japan consist of insurance and social assistance programs that maximize the prevention of risks and threats to a citizen's life. Social assistance programs are particularly important for the realization of people's right to a "full and dignified life," at least as a basis and to be a "last resort" for social security (UNDP Kazakhstan, 2004). The current social infrastructure system was not designed to respond to problems such as low birth rates and an aging population. In addition, an unexpected situation has emerged—the rapid growth of foreign workers and settlers—requiring an urgent response. Toshiaki (2020), in his work "Social Integration of Japanese

Immigrants," held a dialogue with experts on immigrant and refugee issues, in which experts explained the economic disadvantage of attracting foreigners to the country. An important reason for this was the social security of immigrants. According to the Convention Relating to the Status of Refugees (United Nations Conference, 1951), ratified by Japan in 1951, social security is, in principle, indiscriminate both inside and outside the country. In other words, "both Japanese and foreigners are treated equally," and there are no restrictions on the use of social support depending on nationality (Davis & Ikeno, 2008).

The essence of the problem is that social security is based on long-term participation. That is, the state allocates various resources to support a population that will contribute to the country's development in the long run. For example, to medical care, services on which the average Japanese spends between 20 and 30 million yen per lifetime. The whole social security mechanism only works by investing a large sum of money. Therefore, if foreign workers and settlers come to Japan for a short period, the burden of staying may exceed the benefit of their work, negatively affecting the maintenance of the social system. What is needed now is a fair and rational system that facilitates its maintenance, which will work for both Japanese and foreigners (Kohei, 2019).

Foreigners working in Japan can be divided into two types: those employed in Japan (locally hired foreigners) and those arriving from foreign companies (expats). In the case of locally employed foreigners, they are covered by social and health insurance, social pensions, and employment insurance, except for some workers (working for a certain period). When such a foreign worker is hired or, conversely, dismissed, the place of business must inform the "Hello Work" centers of the foreign worker's name and residence status. In the case of expats, they provide labor to a Japanese business establishment and receive compensation from it. Alternatively, the insurer will make an exhaustive judgment based on the application status of the rules of the respective business establishment. The Social Insurance Office considers that if the Japanese commercial establishment pays the main wage, there is a significant consumer dependency, and it determines that social insurance is compulsory. If the Japanese office only provides accommodation and the basic salary is not paid, it can be decided that the person does not need social insurance. The judgment criteria differ according to the conditions of employment. Foreigners who work for a short period (usually five years or less) may be exempt from receiving social insurance in Japan according to the social security agreements with each country.

Another social security problem has been the present situation regarding foreigners' use of health insurance. At the moment, about 10% of health insurance card holders are foreigners (Immigration Services Agency of Japan, 2023). Attention must be drawn to the full-scale growth of foreign workers due to the revision of the Immigration Control and Asylum Act. The problems can be divided into several types depending on whether the insurance user is a person, family, or third party and whether the place of use is local (foreign) or home. The first case is a medical

examination at home by dependent relatives. This is because the union health insurance has insured dependent relatives up to the third degree. In this case, difficulties arise because the kinship cannot always be confirmed, which could be abused. The second case is when dependent relatives come to Japan for a medical examination in Japan. This is the case when a person becomes a dependent relative after an illness or enters the country for medical treatment; you register with the public health insurance system and undergo a medical examination. A concrete example can be given for a better understanding of the situation. A Chinese woman in her sixties, supporting herself and her retired husband, was diagnosed with colorectal cancer in China. She found out that there was a cheap way to get advanced treatment in Japan, so she came to Japan. Her daughter, who was married to a Japanese man, lived in Japan. The Chinese woman came to Japan, where her Japanese son-in-law became her guardian, and she joined the National Health Insurance Scheme. Her total medical expenses, including surgery, would have been more than 2 million yen, yet she paid about 200,000 yen (Toshiaki, 2020).

The third case occurs when a person enters Japan to undergo a medical examination to join the National Health Insurance Scheme, pretending that the purpose of visiting Japan is to study abroad. According to media reports, the National Centre for Global Health and Medicine, which receives about twenty thousand foreigners a year, conducted a fact-finding study two years ago. As a result, 140 foreign patients were suspected of illegally obtaining a health insurance card. It was pointed out that there were cases of people entering Japan to study who were hospitalized immediately after joining the National Health Insurance Scheme, as well as cases of many foreigners having the same address on their health insurance cards. According to a 2018 fact-finding survey conducted by the Ministry of Health, Labor, and Welfare, there were 1,597 cases of expensive medical examinations worth 800,000 yen within six months of joining the National Health Insurance Scheme. Several cases of disguised visits to Japan were confirmed. Fourthly, unauthorized use of the health insurance card by a third party (using another person's health insurance). Sometimes, advertisements from people asking to borrow a health insurance card can be found on social media. There is even a Chinese website advertising the use of Japanese medicine, 30% of which is paid for out of pocket.

There are also concerns about the illegal receipt of a lump-sum birth grant, which is a subsidy for the birth of a child. The national health insurance scheme provides 420,000 yen for a child, which also applies to foreigners. Some foreign pregnant women receive a visa to stay in Japan for more than three months. This way, they can join the public health insurance system and receive a lump sum payment for childbirth and childcare. In 2016, the lump sum payment for childbirth and childcare in the Tokyo-Arakawa special district was 304 cases (127 million yen), of which 168 were Japanese women and 136 foreign women. Of the foreign women, forty-nine gave birth abroad (one in the United States, one in Thailand, two in Australia, seven in Vietnam, and thirty-one in China). The main purpose of the lump-sum birth

and maternity allowance is to counteract the decline in fertility. This measure only pays off if a child born in Japan stays and grows up in Japan. In 2017, the number of people covered by the National Health Insurance was 2,945 million. Of these, 990,000 were foreigners, or 3.4% of the total, over 10% in urban areas. The proportion of foreigners by age is 4.3% from 0 to 19 years, 11.8% from 20 to 39 years (this is the main age group of foreign workers), 2.8% from 40 to 64 years, and 0.4% from 65 years. The number of foreign residents will increase in the future, with the total number exceeding 10% (Kohei, 2019).

Social Security and Health Insurance Issues

The increase in the proportion of foreigners in the public health insurance system will be influenced by the increase in permanent foreign residents and the government's recommendation on medical tourism. Japan encourages the correct use of medical care, but there is a possibility that the number of illegal cases described above will increase. Measures are being taken to eliminate the violation of the law. For example, since 2016, attaching a "certificate of overseas travel" and a "consent form to request the contents of treatment" to applications for medical expenses abroad has become mandatory. When a health insurance association examines an insured person, he or she must now present a certificate of transfer. Additional identification measures must also be taken. For example, at the moment, insurance cards do not have a photo of the holder's face, which makes them easy to forge and misuse. Further, social workers and medical interpreters should be sent to hospitals. A full examination of the medical condition and circumstances is directly linked to preventing fraud. With regard to consultation with the above-mentioned third-degree dependent relatives, the requirements for their residence in Japan will be changed. In other words, relatives living abroad are excluded from being possible wards. It is difficult to confirm the blood relationship and the actual situation of dependents in the foreigner's country of residence, and the requirements are stricter due to the possibility of unauthorized use (Toshiaki, 2020).

When it comes to education, foreigners have the exact same rights and conditions as Japanese. Public education in primary and secondary schools is free for all, while high school and higher education are subject to a fee. The only costs for school are the purchase of school uniforms and stationery, but you will be required to pay some costs for lunches, school supplies, uniforms, and contributions to the Parents' Board of Trustees. International students in Japan have the same rights as local students. To enroll a child in school, the parent must register his or her address with the local municipality. Once he or she does so, the child will be assigned to a specific school. The child must meet the following requirements: the appropriate age for the school year in which they are enrolled; an enrolment form; references from the previous school; and a residence permit. Some private international and international schools also accept both Japanese and foreigners. It can be concluded that

in the field of social security, the Japanese government tries to maintain a balance between the population and provide foreign residents with the same social security conditions as Japanese citizens. However, because social security for Japanese citizens only benefits the government in the long term, it is not profitable to provide it for foreign residents, who mostly come for relatively short periods. Therefore, measures are now being taken to solve this problem. The parliament is developing special social security and insurance schemes for foreigners to give full assurance and security during their stay in Japan.

Migrants in Japan's Labor Market: Addressing Workforce Challenges and Immigration Reforms

Migrants in the labor market. Today, almost 3 million migrants live in Japan out of a population of 126 million. That is three times more than in 1990. As Japan grapples with a rapidly aging population and a shrinking domestic workforce, it aims to increase that number further. In April 2019, Tokyo introduced historic immigration reform, expanding visa programs to allow more than 345,000 new workers to immigrate to Japan over the next five years. Low-skilled workers will be able to reside in Japan for five years, while foreign workers with special skills will be allowed to stay indefinitely with their families, suggesting that many of these workers may stay permanently. Japan's foreign labor problem became an important labor market issue in the 1980s. This was because the Japanese economy was very active at the time, economic indicators were growing, and Japan invested heavily in foreign capital. As a result, the Japanese market was open to foreign companies, and the immigration of foreign workers increased. Finding work abroad was a serious problem. Thus, illegal immigration attracted the government's attention (Matrusova, 2016). The immigration policy at the time allowed only a temporary presence of foreigners. At the same time, the use of illegal labor was spreading actively, also for long periods. Most illegal immigrants were from South and Southeast Asia and worked in small businesses and industries. This rapid spread of illegal immigrant labor was facilitated by rather lenient legislation and also an acute shortage of labor previously not filled by the local population (construction, industry) (Makhazhanova et al., 2022).

To remedy the situation, the Japanese government hired experts to analyze the impact of the internationalization of the Japanese economy on the labor market and to predict its possible consequences. As a result of the studies, several projects were proposed to the government, including new entry conditions for immigrants, changing the provisions on immigrant status, and modifying the registration procedure for foreigners entering the country. As a result, a new immigration law was passed in 1990, which changed the immigration rules for foreign workers. According to the new law, the conditions of stay for foreigners were eased, and their rights were extended to facilitate the arrival of highly skilled professionals. A new residence status, *teijusha*, was introduced, which implied long-term residence. Secondly, the

prohibition of immigration aimed at labor activity without a special status to work (illegal immigration) was reiterated. The law increased penalties and sanctions for violating the law and broadened the concepts of criminal offenses. Not only illegal labor immigrants but also employers, recruitment agencies, and intermediaries have now been criminalized. The third addition to the Act established certain conditions that all labor immigrants must meet. The file management system was greatly simplified. All this simplified the migration process for foreign workers. The last addition restructured the education (or further training) system for foreign workers. In September 1990, the law was changed to allow Japanese employers to train foreigners in industrial enterprises. If a foreigner took up employment under such conditions, he or she was awarded a special "apprentice" status and the right to reside in Japan for two years (Siu & Koo, 2021).

As a result, in the late 1990s, Japan's migration policy began to adjust in response to the new conditions of a globalized Japanese economy. Furthermore, contrary to a history of political "bending" and limiting the entry of unskilled workers, the Japanese region opened its labor market, partly due to recent legislation. Access to the labor market was opened primarily by the descendants of Japanese (excluding refugees and those exported from Korea and China) who emigrated (*nikkeijin*) to the Latin American region in the early twentieth century, which attracted many immigrants from the same countries. According to renowned Japanese scholars, the special status of the *nikkeijin* has put them in a more favorable position in the labor market than other categories of foreign workers. In the 1990s, the *nikkeijin* practically disappeared from the smallest enterprises and displaced, at least partially, illegals from other countries from medium-sized enterprises. Overall, the labor market, particularly its foreign part, has increasingly attracted Japanese entrepreneurs with its prospects. Although major changes were made in the entry and exit conditions for foreign workers residing in Japan, many serious problems arose in this area in the second half of the twentieth century. This primarily concerned unskilled foreign workers (Mori, 1999).

Studies conducted before the Immigration Control Act was passed have shown that for Japan to attract and utilize the talents of a highly skilled foreign workforce, this very foreign workforce needs to be trained in Japan itself. The practice of training foreigners for work already existed before mass immigration began back in the 1960s. At that time, however, the prerogative of Japanese multinational corporations prepared a foreign contingent of their personnel in Japan for subsequent work in foreign branches (Dzhulai, 2023). Studies conducted before the Act came into force show that Japan needs to train these foreign workers in Japan in order to attract more foreign workers with high qualifications. The practice of vocational training for foreigners existed long before mass migration began in the 1960s. However, back then, Japanese multinational corporations were the only ones to perform this technique of training foreign workers to prepare employees to work in the company's overseas subsidiaries (Pavlyatenko, 2008; Avetisyan, 2016).

Multinational corporations have set themselves a set of goals, and two of them are now a priority. The first is relocating large offshore production facilities, mainly to Southeast Asia, exacerbating the problem of foreign companies and Japan coordinating their scientific research production units. Another is the promotion of qualification of company employees in Japan to take advantage of the latest technologies that have not yet been used in foreign production processes. The practice of training and qualification in Japan was on the rise because obtaining the necessary knowledge locally was impossible. However, how multinational companies solve this problem does not compare with the Japanese government's plan to attract highly skilled workers through immigration. Moreover, there is now a tendency for highly skilled foreigners to arrive (Komilova et al., 2020). Small companies are in great need of them and take them on as workers. The situation in this area and the lack of means of production, labor force, and resources to improve the situation for them encourage such immigration in the first place (Kerimkhulle et al., 2022).

Japan's current labor market situation is inextricably linked to the status of foreign residents. Employment-related residency statuses include diplomat, official, professor, artist, religious worker, journalist, business manager, lawyer/accountant, medical worker, researcher, instructor, engineer, humanities specialist, artist, skilled worker, technical trainee, cultural worker, short-term visitor to the country, student, trainee, etc. Of these statuses, those ranging from "diplomat" to "technical trainee" allow for gainful activities. In addition, foreign nationals granted residence status for "certain activities" may engage in commercial activities outside their status, but only if allowed to engage in these specific activities. Foreigners with one of the statuses ranging from cultural activity to dependent may not engage in profit-making activities. However, they may engage in certain profit-making activities if allowed to do so in certain areas outside their residence status. Residence statuses arising from a person's personal situation include permanent resident, spouse or child of a Japanese citizen, spouse or child of a permanent resident, and long-term resident. Holders of these status categories may engage in any type of employment activity, regardless of whether it is unskilled or highly skilled.

CONCLUSIONS

The migration policy of any state should ensure a high level of protection of the national economy, address employment problems within the country by regulating the number of foreign labor force, and rationally use the migrant workers arriving in the country in the economic and political interests of the importing country. It is worth noting that Japan, in its state policy, has been able to take quite effective measures to regulate migration. The migration concept has a number of strengths and merits and has proven to be effective. The stability of the labor market, high employment rates, and low unemployment rates are indicators of its effectiveness.

To summarize all the main conclusions of the paper, it can be argued that the legislative framework is important in dealing with migrants, which in Japan is recognized as highly effective; in general, the mechanism formed by the Japanese government for dealing with the migrant population copes with all its tasks. In the course of the work, the main problems of adapting to life in Japan were identified, which are the focus of the governing authorities. Despite Japan's measures, it is clear that the biggest dilemma for Japan remains the question of the need for immigrants, as opinions on the matter are sharply divided: the political elite sees no need to change their position on the issue, and representatives of the business community want to attract more and more migrants. Labor shortages are particularly acute in the healthcare, agriculture, construction, and information technology sectors. To address this, Japan has been looking to attract foreign workers to fill these gaps. Many experts argue that Japan will have to open the door to new immigrants due to the aging demographic situation, labor shortages, and other factors. For now, Japan is not ready to completely rethink its immigration policy and offer a way out of a state in which there is a progressive and accelerating process of population aging and, as a consequence, a decreasing proportion of working-age people and slower economic growth.

In conclusion, Japan's immigration policies have evolved significantly over the years, driven by economic needs, demographic shifts, and changing global dynamics. While the country has moved toward a more open stance on immigration, it continues to balance preserving its cultural identity with the practical realities of labor shortages and demographic challenges. The ongoing discussions and adjustments to immigration policies will play a crucial role in shaping Japan's future as a diverse and dynamic society. The scientific value of studying migrant issues in contemporary Japan extends across numerous disciplines, offering insights into demographic shifts, labor markets, social dynamics, cultural interactions, policy effectiveness, and more. This research informs policy decisions and contributes to broader academic understanding and global discussions on migration and diversity.

The future of immigration and social security in Japan presents a complex set of challenges and opportunities. As the country grapples with an aging population, low birth rates, and labor shortages, immigration will likely play a crucial role in shaping its social and economic landscape. Public Perception and Attitudes could be the perspective area for further research on this topic. Attitudes toward immigrants can shape policy decisions and societal dynamics. Research on public perception, stereotypes, and xenophobia can inform efforts to promote inclusivity and combat negative biases.

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POVZETEK

MIGRANTSKI IZZIVI V SODOBNI JAPONSKI
Aigerim Adilgazinova, Lyailya Balakayeva, Mara Gubaidullina

Avtorice v prispevku obravnavajo migrantske izzive v sodobni japonski družbi. Predstavijo zgodovinski kontekst emigracijskih trendov na Japonskem in razvoj politik priseljevanja skozi čas. Japonska, ki je nekoč veljala za državo izseljevanja, se danes osredotoča na strateško priseljevanje za reševanje težave pomanjkanja delovne sile. Med najpomembnejše spremembe v imigracijski politiki sodita uvedba statusa stalnega prebivališča za pripravnike leta 1990 ter razširitev programov za pridobitev vizumov leta 2019, ki omogočata prihod več tujim delavcem.

Avtorice analizirajo vlogo in strukturo japonskega urada za priseljevanje pri regulaciji migracijskih procesov. Izpostavljajo učinkovitost japonskega zakonodajnega okvira pri upravljanju migrantov. Urad za priseljevanje je odgovoren za nadzor vstopanja v državo in izstopanja iz nje ter določa merila za upravičenost do različnih rezidenčnih statusov, vezanih na zaposlitev. Na Japonskem je trenutno po uradnih podatkih več kot 2,9 milijona priseljencev, kar kaže na trend naraščanja števila migrantov.

V nadaljevanju avtorice predstavijo izzive, povezane z vključevanjem migrantov v družbo in na trg dela. Slednji vključujejo plačevanje socialnih prispevkov, goljufije na področju zdravstvenega zavarovanja ter neustrezno upravljanje tujih delavcev s strani delodajalcev. Japonska želi zaradi pomanjkanja delovne sile v sektorjih, kot sta zdravstvo in gradbeništvo, privabiti več priseljencev, vendar pa ta cilj še vedno usklajuje s ciljem ohranjanja kulturne identitete. Eden od predlogov je vzpostavitev posebnih sistemov socialne varnosti za tujce.

Japonski mehanizem za upravljanje priseljevanja je v splošnem učinkovit, kljub temu pa se še vedno pojavljajo določene težave pri prilagajanju in vključevanju priseljencev. Avtorice v prispevku ugotavljajo, da se bo morala Japonska glede na demografske in gospodarske razmere v državi verjetno še naprej odpirati priseljencem, čeprav je mnenje javnosti do nadaljnjega priseljevanja še vedno neenotno.

MIGRATION PROCESSES IN THE REPUBLIC OF KAZAKHSTAN: REGULARITIES, PROBLEMS, AND PROSPECTS

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ABSTRACT
Migration Processes in the Republic of Kazakhstan: Regularities, Problems, and Prospects
The study's relevance lies in the ongoing phenomenon of mass migration, which significantly impacts society, economy, and politics worldwide. The purpose is to consider the features of the current situation in the migration field in Kazakhstan and assess the possibilities for public policy development. In this study, the problem-thematic method and the method of policy analysis were used. The study emphasizes the role of migration trends in Kazakhstan and the impact on its socioeconomic, demographic, cultural, and political development. Special attention is paid to integrating global trends and socioeconomic prerequisites for the reception of migrants.
KEYWORDS: globalization trends, migration risks, migration policy, migration factors, migration potential

IZVLEČEK
Migracijski procesi v Republiki Kazahstan: značilnosti, problemi in perspektive
Prispevek je pomemben zaradi sodobnega pojava množičnih migracij, ki pomembno vplivajo na družbo, gospodarstvo in politiko po vsem svetu. Namen študije je preučiti značilnosti trenutnega stanja na področju migracij v Kazahstanu ter oceniti možnosti za razvoj javnih politike na tem področju. Avtorji so pri tem uporabili problemsko-tematsko metodo in metodo analize politik. Izpostavljajo vlogo migracijskih trendov v Kazahstanu in njihov vpliv na družbenoekonomski, demografski, kulturni in politični razvoj države. Posebno pozornost namenjajo prilagajanju globalnim trendom in družbenoekonomskim predpogojem za sprejem migrantov.
KLJUČNE BESEDE: globalizacijski trendi, migracijska tveganja, migracijska politika, dejavniki migracij, migracijski potencial

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INTRODUCTION

The world's current situation shows that migration processes have acquired an unprecedented scale. Having become a leading factor in social processes, migration is largely linked to global economic, political, and technological transformations. As globalization processes have deepened, these transformations, on the one hand, have reduced distance through the spread of information technology and, on the other hand, have created a state of geopolitical uncertainty. Humanity is familiar with the mass resettlement of people caused by historical, economic, and military-political events that change the world's national, religious, and demographic situations. For example, the Spanish Reconquista, the development of American lands, the Russian Revolution, and World War II.

The tense situations in the Middle East, Asia, and Africa in the twenty-first century triggered a European migration crisis, which brought social and economic instability to many states (Ntshangase & Msosa, 2022). For a long time, European countries solved their problems through migration (demographic, natural aging, human resources, and others). However, recently, many politicians have characterized these problems (illegal migrants, demographic distortion, the labor market, criminal structures, destabilization of society, and the deterioration of the sanitary and epidemiological situation) "as the beginning of the decline of Europe." If migration to Western European countries is caused by the desire to increase the material and economic status, population movements in Eastern European countries are mainly temporary movements of the labor force from one region to another to earn money (Miethlich, 2022). In Russia, migration is estimated to be caused by a natural decrease in population, labor shortages, uneven economic development of the regions, and state participation in integration alliances in the post-Soviet space (Schensnovich, 2021; Palmer & Drbohlav, 2022).

The expansion of international migration is evidenced by statistics related to the 272 million international migrants worldwide. According to the United Nations, almost 75% of the world's 202 million migrants were between twenty and sixty-four years of age in mid-2021. There are 38 million people under twenty years of age, or 14% of the total number of migrants. The Republic of Kazakhstan (RK) has established a visa-free regime with seventy-three countries, of which fifty-four countries have been granted a visa-free regime unilaterally, and nineteen countries have concluded bilateral agreements (Kappassova, 2018; Figure 1).

Figure 1: A map of Kazakhstan's visa policy (source: Ministry of Foreign Affairs of the Republic of Kazakhstan, 2023).

To date, Kazakhstan has received 3.7 million international migrants, ranking sixteenth in the world. Based on the strategic vision of the role of migration processes, as well as taking into account both Kazakhstan's experience and international experience in managing migration processes and guided by the objectives of ensuring national interests in conjunction with the development opportunities in various social areas, the Government of Kazakhstan has approved the Concept of Migration Policy of the Republic of Kazakhstan for 2022–2026 (Amerkhanova et al., 2021). The new policy aims to improve the system of ethnic migration management, pay attention to the employment of *kandas* and their integration into local communities, and more actively work with special support funds to disseminate information about the resettlement program to Kazakhstan in Kazakh communities in various countries. The new migration policy does not imply bureaucratic bans on Kazakhs traveling abroad to work. The policy aims to regulate migration processes more effectively and considers the interests of the state, society, and migrants.

In assessing major trends and patterns of the studied industry over the last century, experts discuss the level of border control and the effectiveness of migration management. Contemporary debates on the migration of the lower-class workforce and asylum seekers are often the problem of a clear failure to "curb immigration" and improve migration policy effectiveness (De Haas et al., 2019).

This article aims to identify the specifics of the current migration situation and assess the prospects for developing state policy on managing migration processes in the context of globalization and the expansion of international migration. To solve this research problem, it is necessary to update the issue of the formation of

migration policy in the Republic of Kazakhstan in the context of globalization of trends, problems, and prospects for international migration.

MATERIALS AND METHODS

The basis of the study was the general scientific methodology, providing for structural functionalism combined with an integrated humanitarian interdisciplinary and culturological approach to the analysis of global and national migration processes. The object of this study was the regularities, problems, and prospects of migration processes in the Republic of Kazakhstan. The specific nature of the object and subject matter of the research and the nature of the research questions determined the choice of methods—problem-thematic and applied political analysis. As a result, it is understood that competent political decision-making is impossible without two other essential components—the analysis of the political situation in the field of migration processes and the formation of assumptions about their development. The objective basis for applying the problem-thematic analysis method focused on identifying the sustainable parameters of migration processes, which had previously been reproduced in scientific-theoretical research by scientists in the field. The study was structured according to the conclusions of A. Leiserson (1953), who, in assessing the problems of the methodology of political research, writes that there are no hidden sources of truth, respectively, cognition of the world of politics should be based on the verification of statements. Thus, logical consistency and adequacy of evidence are important. The political world is ordered, and processes are characterized by regularity, enabling knowledge accumulation and transfer. Research distortions can be limited and enhanced through immersion in a specific political context and its verification.

The above methods were used in the studies of M. V. Kulaga (2021). Thanks to their use, it was possible to analyze rather complex processes in the field of politics while considering many aspects of the development of society and the political process in countries. His analysis was based on principles allowing for revealing aspects of historicism and cultural and political continuity.

At the first stage of the research, the information base was studied. Thus, the analytical studies and developments of international organizations, scientific teams, and state bodies of the Republic of Kazakhstan for 2018–2021 used in this article include the European Commission (2022), the World Bank (2022); the Organization for Economic Cooperation and Development (2022); the Institute of World Economy and International Relations (2022); the International Organization for Migration (2022); and the Statistical Division of the Department of Economic and Social Affairs of the Ministry of Foreign Affairs of the Republic of Kazakhstan (2022).

In the second stage, the statistics were analyzed using problem-based thematic and applied policy analysis. The mentioned research methods allowed for identifying

regularities, problems, and prospects of migration processes of the Republic of Kazakhstan, which were not previously reproduced in scientific-theoretical studies by scientists in the field.

In order to investigate the structural and dynamic characteristics of the historical representation of migration processes, general studies, general fundamental works, special monographic studies, scientific articles, scientific conference materials, reviews, and archival and published documents reconstructing migration processes over the last five years were analyzed. The research was conducted in accordance with the principle of scientific objectivity, which required the authors to overcome subjective errors and the influence of interests. Such research is relevant today as it contains concrete historical material, and the results and conclusions contained therein can be used in the development of courses on political science.

RESULTS

An understanding of the conceptual framework is important in defining the objectives of migration regulation. According to the International Organization for Migration (2022), a migrant is a person who has revealed a desire to move or has already done so by way of an international border or within the country in which he is located, has left his place of residence, regardless of his legal status, the nature of the movement, its reason and duration. The UN Department of Economic and Social Affairs conducts a study on the numbers and patterns of international migrants at regular intervals. According to United Nations methodology, population census data and nationally representative surveys are used in determining the number of such migrants. International migrants in some countries include those citizens who have never lived abroad but acquired foreign citizenship because of the citizenship of their parents. On the contrary, in some states, having been born abroad and then returning and acquiring citizenship at home does not make a person a migrant. However, despite these differences, the UN uses the country of citizenship as the basis for determining migrant status. Accordingly, without information on the country of birth, a nationality other than the country of permanent residence is used to identify migrants (Table 1). By examining the patterns of contemporary migration processes, it is concluded that they are conditioned by the course of humanity's historical development and its location across countries and continents.

Migration periods	Period	Consequence	Value
First period	The era of the Great Migration of Peoples at the end of the ancient era and the beginning of the early Middle Ages	the settlement of Germanic peoples in Central and Northern Europe; the spread of Slavic peoples across Eastern Europe, their settlement of the Balkan Peninsula; the settlement of Turkic peoples in Central Asia and Asia Minor; the resettlement of Magyars (Hungarians) from the Southern Urals to the area of the Middle Danube; the spread of Arabs to the countries of the Middle East and North Africa; Mongol-Tatar campaigns to Asian countries and Eastern Europe, the appearance of the Tatar population in the Volga region; the settlement of Bantu tribes from western Equatorial Africa into South Africa and other migrations.	Has had a significant impact on the origins of many peoples in Europe and Asia
Second period	The Age of Discovery in the fifteenth and sixteenth centuries	Spanish and Portuguese migration to Central and South America; migration to North America by the English, French, Irish, Scots, and others; in the second half of the eighteenth century, about one million people moved over the ocean from Europe, two-thirds of whom were natives of Great Britain; the removal of millions of black slaves from Africa to the Americas by colonizers (wars and the slave trade led to a decline in Africa's population in the eighteenth century); the strengthening of the Moscow state led to the expansion of its borders, with Russians advancing into the Volga region, the Urals, and Siberia.	Gave a starting point for the point of major inter- and intra-continental migrations

Third period	Late nineteenth and early twenty-first centuries	emigration from Europe to America of between 200,000 and 400,000 people a year; emigration from Europe to Australia and New Zealand, mainly from the British Isles; emigration from Europe to South Africa led to the displacement of the indigenous population: the Hottentots, the Bushmen, the Bantu; European settlement in North Africa: to Algeria by the French; to Tunisia by the Italians and French; to Morocco by the French and Spanish; population migration from China to Southeast Asia (hundreds of thousands per year); from Japan to the Hawaiian Islands; from India to Sri Lanka, Burma, Malaysia, and other countries.	A modern geography of inter-continental migration has developed

Table 1: Historical matrix of migration periods

It should be noted that the rapid growth of the world's population in the twentieth century, from just over one to six billion people by the end of the century, led to significant migration patterns. In addition, two world wars had an impact on migration processes. For example, World War I caused civilians to flee from war zones, followed by the formation of new states and the relocation of minorities from one country to another (for example, some 200,000 Turks from Bulgaria and Yugoslavia). At the same time, overseas emigration from Europe intensified at the rate of about 600,000 people a year. For political reasons, emigration from countries with a fascist regime increased in the 1930s. Some nine million people left Europe for the Americas in the period between 1918 and 1939; about 300,000 Jews went to Palestine under British rule. Already in the late 1930s, inter-continental migrations gave way to intra-continental ones. The direction of migrations went from economically underdeveloped countries to developed countries, mainly France, Great Britain, Belgium, Switzerland, and the United States. In the Union of Soviet Socialist Republics (USSR), migration was directed toward Siberia, the Far East, and Central Asia (Nurtazina & Toktushakov, 2017).

World War II brought about a significant change in population distribution. Following the Potsdam Conference, about 700,000 Germans were displaced from

countries in Eastern Europe; of the 12 million who had lived there before the war, about 700,000 remained. At the same time, 1.5 million people who had been forcibly deported to Germany from countries that had been subject to Nazi occupation returned to their homeland or moved to other states. After the war, similar border settlements also led to relocations of national minorities. According to the International Organization for Migration, for example, the number of Jewish refugees in Palestine by 1947 was 700,000. After the UN decision to create two independent states in Palestine, Jewish and Arab, 900,000 Jews moved to Israel in 1947–1957, and 740,000 Arabs left Israel. The repatriation of 200,000 Armenians from Europe and the Middle East took place in the USSR.

As a migratory consequence of the defeat of Japan in World War II, 6 million Japanese, mostly from China and Korea, were displaced. Subsequently, the formation of the states of India and Pakistan led to 7 million refugees fleeing to Pakistan and 8.5 million to India. At the same time, there was an increase in emigration to Australia and New Zealand; from 1946 to 1957, the number of migrants to these countries totaled 1.02 million. The analysis of statistical data from international organizations allows for the identification of distinguishing features that have developed in immigration and emigration countries and that contribute to the global growth of migration processes. In countries of immigration, some characteristic features include relatively low population density, availability of large natural resources such as land and minerals, a relatively high level of development of productive forces, the ability of states to provide employment to migrants and increase their standard of living, and assistance in adaptation to new conditions. These factors can attract migrants to move to these countries.

At the same time, countries of emigration were characterized by high population density with limited economic opportunities for countries to efficiently use their able-bodied population and the existence of permanent migration relations with the countries of immigration. Thus, by the twentieth century, certain regularities of the world migration processes have been formed: migration in its usual meaning was replaced by international migration of labor force, which was connected with uneven economic development of countries, dependence of economies of countries of immigration on the use of migrant labor; increase in the scale of world migration, involvement of all countries in the world migration process; qualitative changes in the composition of migrants, increase in the proportion of those with high level of education and professional training, according to the International Labour Organization (Tomashevski & Yaroshenko, 2020).

The total number of migrants in the world in mid-2021 rose markedly to 272 million from 153 million in 1990, according to the United Nations. International migrants accounted for 3.5% of the world's population that year. Women are slightly less likely than men to be migrants globally. In the year, the 2021 "female" share was 47.9%. Half of all international migrants are from twenty countries worldwide (Whyte, 2022). India is recorded as having the highest number of migrants, with

17.5 million of its citizens scattered around the world. Mexico takes second place, with 11.8 million migrants claiming it as their country of origin. China is the original home to 10.7 million migrants. Russians moved slightly less—nearly 10.5 million of its citizens live worldwide. In fifth place is Syria, with about 8.2 million of its citizens having departed. Table 2 presents the destination countries of the European continent most attractive for migrants.

Place by number of migrants	Country	Number of migrants (million people)	Percentage of the total population
1	Germany	12.0	14.5
2	Russia	11.6	14.9
3	United Kingdom	8.2	13.5
4	France	7.8	12.1
5	Spain	5.8	12.7
6	Italy	5.7	9.7
7	Ukraine	4.8	9.8
8	Kazakhstan	3.7	20.0
9	Sweden	1.6	16.8
10	Belgium	1.4	16.3
11	Greece	1.2	11.3
12	Belarus	1.0	11.0

Table 2: Matrix for the distribution of migrants in selected countries of the European continent in 2018

By the end of the twentieth century, Western Europe had become a new labor destination, welcoming migrants from developing countries. In France, Switzerland, Sweden, and Germany, foreigners worked in labor-intensive industries. The "vogue in Europe" is gradually fading: the labor market is oversaturated, and migrants pose a serious problem. Relatively new destinations for labor migration are Israel, oil-producing countries in the Middle East, and some rapidly developing Asian countries. The trend in recent years is a gradual change in the structure of migration. More people from neighboring Uzbekistan are starting to come to the country. According to the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, in 2018, Uzbekistan led in the number of incoming migrants—4,400 people, followed by representatives of the Russian Federation—3,900. Also, China, Turkmenistan, and Kyrgyzstan were in the top five countries of migration last year. Meanwhile, in the overall structure of accumulated migration, Russia prevails.

The international political climate exerts a significant role in shaping the migration structures of Kazakhstan. Diplomatic relations, bilateral agreements, and

international cooperation frameworks impact migration policies, while geopolitical factors, economic opportunities, and security considerations influence migration preferences and trends. The safety and security situation in neighboring regions, along with global human rights agendas and engagement with international organizations, also play a crucial role in determining how Kazakhstan manages migrant protection, labor conditions, and integration (De Sherbinin, 2022). Additionally, the response to international crises and conflicts, as well as shifts in diplomatic relations, can lead to adjustments in migration policies and border controls, highlighting the intricate interplay between global politics and migration dynamics in Kazakhstan.

Globally, around 4 million people from Kazakhstan had international migrant status by the middle of 2021. Almost 64% of all migrants went to neighboring Russia (almost 2.6 million people). Among other countries chosen by migrants were Germany (940,300), Ukraine (224,000), and Belarus (69,000). One of the attractive destinations for migrants from Kazakhstan was the United States, where 31,200 people went. Greece, Turkmenistan, Israel, Canada, and Uzbekistan were among the ten countries with the highest number of migrants from the country. In 2021, according to the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, three times as many people left the country than arrived in the same period—41,900 people. Of them, 36,800 people left for Russia, 2,700 for Germany, 343 for Belarus, 338 for the United States, and 245 for Uzbekistan. Kazakhstan's international migration balance has been negative for almost twenty years—minus 300,000 people. Most UN member states, including Kazakhstan, approved a Global Compact for Safe, Orderly, and Regular Migration (United Nations, 2018). The document aims to strengthen international cooperation on migration, enhancing the contribution of migrants and the process itself to sustainable development. In contrast to the earlier migrations that were examined, modern migration processes are characterized by the following:

1. An increase in the number of skilled workers and professionals moving away, a "brain drain."
2. Whereas mass migrations in the past were caused by various political or natural cataclysms and were spontaneous, today, they are an ongoing process that tends to increase.
3. Repatriation processes (if a person has foreign roots, they may consider emigration by nationality to a very limited number of countries). For this reason, one can move to Israel and Germany, which have developed special programs for the resettlement of compatriots in their states.
4. The emergence of a large number of irregular migrants (who have become not only a cheap labor resource but also a factor increasing crime rates and triggering mass disturbances and social tensions (a characteristic of many states).

Migration processes in Kazakhstan exhibit diverse impacts across various regions. Notably, the Almaty region and city emerged as significant destinations for migrant

workers, attracting individuals primarily from neighboring countries. The Mangystau region stands out due to its association with the oil and gas industry, drawing migrant workers seeking opportunities in this sector. Border regions, notably those adjoining Uzbekistan, Kyrgyzstan, and China, are notably affected by migration due to Kazakhstan's role as a transit country and host for refugees (De Sherbinin, 2022). Additionally, urban centers such as Almaty and Astana attract migrants in pursuit of enhanced job prospects and improved living standards. Acknowledging these region-specific dynamics is crucial for shaping effective policies that manage migration patterns and address associated challenges in Kazakhstan.

According to the definition of the International Organization for Migration (2022), illegal migration is defined as the avoidance of registration by the authorities of the country of residence, violation of the legal terms of stay, or crossing the border by illegal means. In order to properly assess the migration situation in states, the UN offers more precise counting schemes. For example, Figure 2 shows how the population's international migration and temporary mobility are linked to the processes of demographic change in a state.
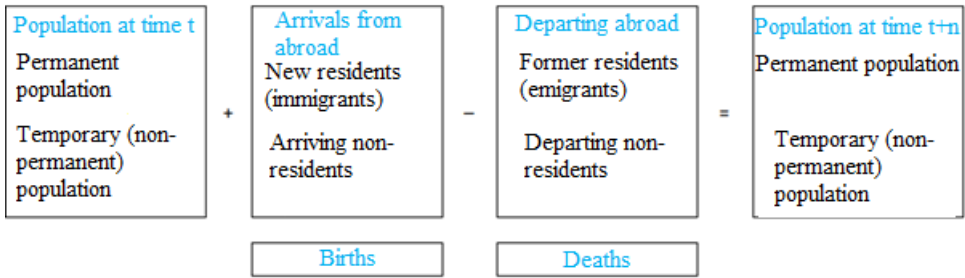

Figure 2: Conceptual framework for international mobility according to the UN Economic and Social Council

In Figure 2, the resident population consists of those who have lived in the country of reference for either (a) most of the previous twelve months (or intend/are allowed to live in the country for at least six months and one day) or (b) at least the previous twelve months (or intend/are allowed to live in the country for at least twelve months), not counting temporary absence on leave or work. The term "temporary population" refers to all persons present in a country at a given time who are not residents.

In addition to governmental and international organizations dealing with migration issues, one should not forget the work of non-governmental organizations (NGOs) in this field. In Kazakhstan, there are the UNHCR National Office, Project HOPE, and the Otandastar Foundation. NGOs play a significant role in migration management in Kazakhstan. NGOs advocate for the rights of migrants and raise awareness of migration issues in Kazakhstan. They also provide information and support to migrants, including legal assistance and access to services. NGOs

build the capacity of state authorities and other stakeholders to manage migration processes effectively. Through various surveys, NGOs assist policymakers in developing evidence-based policies and programs to manage migration. NGOs also provide services to migrants, such as language courses, job training, and social support.

Figure 3 illustrates an ideal and recommended situation in which the permanent population is disaggregated by place of birth and citizenship and the corresponding immigration and emigration.
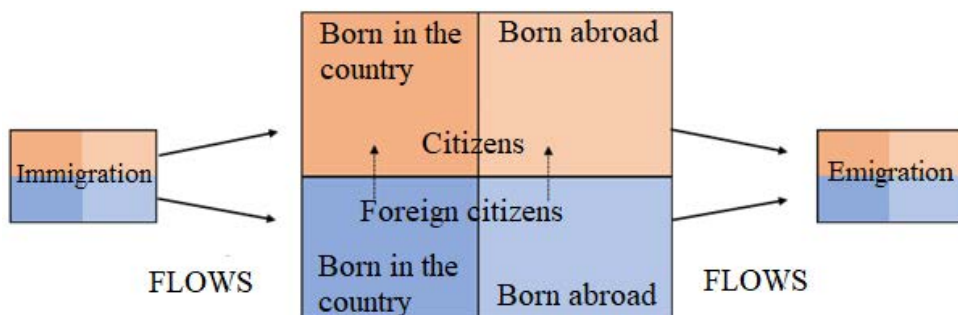

Figure 3: Patterns of international migration and the correlation between migration directions and numbers according to the UN Economic and Social Council

This conceptual framework is used as a basis for recommendations for collecting and disseminating data on international migration and migrants. As before, Figure 3 shows the correlation between directions and numbers. The directions determine changes in the size and structure of the total number of migrants. The scheme also includes a change in status from foreign national to national. Citizenship can be acquired by birth or by naturalization, whether through application, marriage, or other means provided for by national legislation, and can be lost through revocation or renunciation.

The problem of social disorganization has implications for migration in Kazakhstan. Economic instability during crises can lead to outmigration. A positive migration balance suggests a stable environment, attracting migrants (Malikov, 2021). State-supported ethnic repatriation initiatives influence migration, especially among ethnic Kazakhs. Underdeveloped migratory legal frameworks may create uncertainty for migrants. Concentrations of migrant workers in certain regions can highlight social and working condition challenges, affecting migration dynamics. The relationship between social disorganization, economic factors, legal frameworks, and state initiatives collectively shapes migration patterns in Kazakhstan (International Organization for Migration, 2023).

Amidst the backdrop of globalization and the escalating intricacies of international migration, Kazakhstan is confronted with a myriad of challenges in its endeavor to proficiently manage migration processes. The array of migration patterns, encompassing labor migration, refugee influxes, and irregular migration,

necessitates nuanced strategies tailored to the unique characteristics of each migration type. The delicate task of harmonizing foreign labor requirements with opportunities for local workers amidst the dynamic shifts in the global labor land-scape demands meticulous consideration (Dalelkhan et al., 2018). The imperative of ensuring successful integration and nurturing social cohesion within a society enriched by diverse cultural backgrounds gains prominence, given the convergence of individuals from varied origins through international migration. Kazakhstan endeavors to find an equilibrium between retaining its homegrown talent and beck-oning skilled migrants, deftly navigating the intricate interplay of the brain drain and gain phenomena. The escalating instances of irregular migration, human trafficking, and smuggling underscore the significance of fortified border control mechanisms and a comprehensive legal framework aligned with global standards.

DISCUSSION

In order to understand migration processes, it is necessary to consider such concepts as the "short-term" and "long-term" migration processes. L. Fiorio et al. (2021) suggested that short-term and long-term migration processes can be distin-guished based on the duration of the migration. Short-term migration is defined as a migration that lasts less than one year and can be for work, study, or tourism purposes. It often involves returning to the country of origin after migration and can be measured using digital trace data. Long-term migration, on the other hand, is defined as a migration that lasts more than one year and can be for work, study, family reunification, or other reasons. It often involves settling in the destination country and can be measured using digital trace data (Rampazzo et al., 2022). It is important to note that short-term and long-term migration processes are not mutually exclu-sive, and some migrants may engage in both types of migration. The distinction between short-term and long-term migration can be nuanced, and understanding the differences between them can help policymakers develop appropriate policies to manage migration.

   K. Schurer (2022) points out that population migration in a historical context is of particular interest. For example, it is generally accepted that English society was highly mobile in the past. However, studies of "turnover"—linking residents of a given locality in one year with those who lived in the same locality in the following years—indicate high levels of migration in the nineteenth, eighteenth, and seven-teenth centuries in both urban and rural areas. The study suggests that the rate of population turnover during the medieval period may well correspond to that of the seventeenth century. Examining this historical period, he concludes that young, unmarried adults and adolescents largely dominated this migration. In a study on the nature of migration and population mobility, I.D. Whyte (2022) notes that in the past, its aspects have been studied at different scales: local, regional, and sometimes

national, but only rarely have comparisons been made between countries with different social and economic characteristics. However, precisely, this approach reveals differences in the scale, structure, causes, and consequences of migration, as well as in the underlying structures that have influenced it.

S. Rother (2022), in his own works, mentions that as a result of the pandemic, specialized ways of managing unilateral policies have been developed, such as in the areas of border management and their mobility, as well as migration policy in general; but in doing so, the scholar also highlights the need and importance of global cooperation. The author points out that for global governance in this area to be effective, it must include multilateral aspects, that is, not only countries and international institutions but also other stakeholders. For example, in the global compact for safe, orderly, and regular migration, special attention is given to groups of people directly affected by global politics, i.e., migrants and their organizations (Grega & Nečas, 2022). The basis of the study by J. Raymer and J. O'Donnell is a multi-regional demographic focus model; it links populations through migratory patterns between destinations (Raymer & O'Donnell, 2021). To provide a framework for this model, the authors present a study of the role of internal migration in regional population changes in the Australian state of New South Wales and the Australian Capital Territory from 1981 to 2011. Through this model, many aspects are revealed, such as the composition of age and gender and further demographic processes, such as fertility, aging, and further internal or international migration.

Assessing the ideas of liberalism as one of the most important phenomena of global political development that originated in the West, A.A. Vladimirov (2021) conducts a retrospective analysis of the changes that modern Western liberalism undergoes. The researcher notes that the study of this phenomenon in its historical and socio-political meaning takes an important place in modern science, which is due to the logic of the development of liberal thought in the West. Liberal ideology in modern Western countries is one of the most important factors in their domestic political development. Using the history of Spanish migration policy as an example, it shows how modern Western liberalism, in the course of historical development, is transformed into post-liberalism, in which the value of individual freedom acquires absolute importance in comparison with the secondary values and ideas of liberalism. The study notes that the development of post-liberalism in Spain in the field of migration policy leads to the prioritization of the protection of the rights and freedoms of a social minority (immigrants) over the rights and freedoms of the social majority (Harguindéguy & Cervi, 2022).

A study conducted by J. J. Azose and A. E. Raftery (Azose & Raftery, 2019) at the Department of Sociology of the University of Washington notes that estimates of migration patterns between countries are still inaccurate; accordingly, they suggest keeping records at five-year intervals, revealing patterns that were not visible using previous methods of assessment (for example, estimates show large bidirectional movements in all regions of the world, with about a quarter of migration events

accounted for by people returning to their country of birth). Experts agree that one in seven people in the world is a migrant and that the total turnover of migrant remittances reached about US $350 billion. Statistical data analysis reveals that among 140 million international migrants in the North, 61% were migrants from the South. Of the 103 million migrants from the South, only 13% were born in the North. In this case, it indicates the existence of a major channel for international migration directed from developing countries (South) to developed countries (North). L. Demery (2019) presents migration as a unique historical phenomenon and assesses the prevailing labor migration policies in the Middle East from the perspective of Asian labor-sending countries. For instance, more than 12 million people emigrated from the Syrian Arab Republic during the period of civil war between 2011 and 2015. At the same time, countries such as the United Arab Emirates, Saudi Arabia, Lebanon, and Oman remain the world's top receiving countries. The study points to the growing influence of Arab diasporas on the socioeconomic and political development of many European countries.

It is worth mentioning the importance of analyzing legislation in the field of migration, as this is a direct mechanism for regulating these processes in Kazakhstan; authors such as I.K. Amerkhanova et al. (2021) note the urgent need for its improvement. Considering the migration situation in Kazakhstan, they note the areas needing improvement: creating favorable conditions for ethnic repatriates; building an effective system of external labor migration focused on the needs of Kazakhstan's economy; expanding the legal framework for the regulation of migration processes taking into account best international practices and suppressing illegal migration.

Similar trends in improving the migration legislation of the Republic of Kazakhstan were also noted by G. M. Duysen and D. A. Aitzhanova (Duysen & Aitzhanova, 2018) in the context of considering the migration policy problems of Kazakhstan and Central Asian countries. Because certain collisions of the national migration strategy were identified and an analysis of the problems of the state in the field of migration was carried out, as well as the possibilities and prospects for improving this branch of public policy, the authors could identify prospects for improvement, taking into account many factors in the development of the demographic, economic and social plan, and integration processes. According to the positions of researchers, Kazakhstan's entry into the ranks of thirty developed countries of the world should be based on the new challenges of our time. In particular, the authors point to the need to develop active migration forecasts and realistic scenarios for the future socioeconomic development of each state, taking into account migration factors.

Assessing the diversity of theoretical approaches to understanding migration, M. Bell et al. (2020) argue that micro and macro approaches provide a complementary understanding of migratory behavior and processes and help assess the macro-level perspective of cross-national differences in migration. Outlining the conceptual framework in the study, they suggest interpreting three aspects of migration: the

intensity of migration with national economic development; the age profile of migration with life transitions; and the direction of migration on the evolution of settlement patterns. In the study, they conclude that applying this schema to several countries will give a more accurate picture of the specific combination of forces determining the evolution of different aspects of migration in each national context.

M.V. Kulaga (2021), exploring the problem of the regulation of migration in the European Union, notes that it becomes more intractable and complex every year ("the migration policy of Western European countries has undergone quite a metamorphosis over the last five years"). The study notes that internal resistance—revealed in political initiatives and protests—arises and contributes to the radicalization of society due to the divergence of the internal interests of individual countries, the vector of common European policy, and the complexity of the distribution of migrants across member states. In Western European countries, this is particularly noticeable in the most economically advanced and progressive countries, which have taken in most of the legal migrant arrivals (Miethlich et al., 2022). However, since the start of the migration crisis in 2015, there has been a significant tightening and strengthening of regulatory measures regarding the situation of migrants within the countries. The author notes that it is rather difficult to determine what impact migrants have on the economies of states in the context of the global COVID-19 pandemic.

In their research, C. Hedberg and I. Olofsson (Hedberg & Olofsson, 2022) point out that Western societies have long been permeated by processes of neo-liberalization, including a general orientation toward neoliberal migration regimes. By examining neo-liberalization as a historical and spatially contingent process, they arrive at different phases of intertwined policymaking and the functioning of migration policy. By analyzing the migration industries and pointing out neo-liberalization as a spatial and temporal process, C. Hedberg and I. Olofsson show, using Sweden as an example, how the role of forest berry migration intermediaries has been reconstructed so that the neoliberal regime allows a previously unregulated industry to be controlled. In their opinion, there are strong conditional links between neoliberal political economy, regimes, and industries in the field of migration. Changes in asylum conditions due to the socio-political context of the COVID-19 crisis and the management of the emergency caused by the pandemic have been quite often discussed by academics in the scientific press (Nguyen et al., 2022). Recent academic papers have explored how the pandemic has a major impact on people, as revealed in their rethinking of many concepts such as citizenship, membership, affiliation, human rights, essential workers, and services, along with cross-cutting perspectives including ethnicity, gender, and race (Turlybekova & Shamshudinova, 2021).

C. Brell et al. (2020), presenting their review of the integration of refugees into labor markets in a number of high-income countries, note that a factor and indicator of migration movements is the individual's desire to find better paying work and improve their socioeconomic situation. There is considerable heterogeneity between receiving countries, but overall, refugees consistently fare worse than other

migrants. A. Kaya's analysis of Turkish migration policy concludes that the European-isation of policy, and hence of migration and asylum laws, is consistent with the internalization of migration and asylum policy on a national and local cultural and religious level (Kaya, 2021). For example, the Justice and Development Party has successfully accepted Syrian refugees based on religious rhetoric called "Ansar spirit."

In assessing the effectiveness of migration policies, H. De Haas et al. (2019) built their study on assessing complex interrelationships between policies and trends to identify policy effects from structural determinants. Their study casts doubt on two main assumptions underpinning the idea that constraints have failed to curb the process. First, the levels of global migration after World War II remained relatively stable, while most of the changes in the models studied were directional. Secondly, migration policy after World War II was liberalized regardless of political rhetoric. These implications reveal major policy dilemmas and appreciate the importance of understanding the various trends shaping migration in sometimes counterintuitive but powerful ways that are largely beyond the industry's reach. Assessing the impact of general trends of globalization that link societies and promote convergence of national patterns of multicultural integration, R. Bauböck (1998) examines the impact of international migration on political boundaries in contemporary highly industrialized societies. It is noted that international migration makes both sending and receiving societies translational, extending the respective forms of membership beyond territories and citizenship.

The current Law of the Republic of Kazakhstan No. 477-IV, "On the migration of population" (About population migration, 2023), has several objectives. One is the return of ethnic Kazakhs to their places of origin. By controlling the movement of its citizens outside the country, the state provides everything necessary for those who come to the Republic of Kazakhstan. For example, health authorities are responsible for providing medical care to immigrants; educational structures provide grants and educational materials. Local bodies monitor the work of all controlled structures in the territory. According to the experts of the round table in Astana, organized by the Ministry of Labor and Social Protection of Population of the Republic of Kazakh-stan, the Concept of Migration Policy of the RK for 2022–2026 and the Action Plan to implement the Concept of Migration Policy of the RK for 2022–2026, important steps were made to provide the national economy with qualified international special-ists and to improve the current migration system in general. However, for certain reasons, the January 2022 crisis in Kazakhstan is clearly a reinforcement of migration sentiments. According to the Bureau of National Statistics of the Agency for Strate-gic Planning and Reforms of the Republic of Kazakhstan, a record 48,600 Russians left Kazakhstan in 2021. According to various estimates, approximately 3.5 million Russians, or 18.4% of the total population, now live in Kazakhstan. Online surveys in recent months about intentions to leave Kazakhstan confirmed migration moods in—62.9% of respondents and doubts in—21.4%. As noted before, the increasing globalization processes in the world and the current situation between the Russian

Federation and the Republic of Kazakhstan, operating within a single economic space, require the unification of joint migration policies (Kappassova, 2018).

Skeptics of immigration control argue that this process is internationally driven by structural factors in the economic and political realms, such as income inequality, labor market demands, and conflicts in countries of origin, while networks of migrants, employers, and other intermediaries create social structures that give impetus to these movements (Triandafyllidou, 2022; Akhmetzhanova et al., 2023). Researchers who criticize this position hold the opposite view, arguing that there is no serious crisis in migration management (Raymer & O'Donnell, 2021). In their research, they support their argument by pointing out that the ability of countries of a technological and institutional nature to detect unauthorized migrants has increased, and poor people face increasing difficulties in migrating to rich countries due to immigration restrictions. Meanwhile, most movement worldwide occurs through legal channels, even though media coverage of migrants who cross deserts and seas may suggest otherwise (Schurer, 2022).

In analyzing the role of civil society in global migration governance, individual authors argue that the pandemic of recent years has strengthened the "input" dimension for migrant civil society in global governance. While offering indicators that COVID-19 has impacted some aspects of the measurement of migration policy outcomes (Rother, 2022), it is generally too early to assess whether this will have a long-term impact on policy on the ground. Thus, the academic debate questions the two main assumptions underlying the popular idea that migration restrictions have failed to curb migration. Thus, it is worth noting that global migration after World War II remained very stable even though there were many directions in the changes in the patterns of this process. Further, it should be mentioned that the migration policy after World War II was generally liberalized despite political rhetoric. It must be said that the "substitution effect" can limit the efficiency or even make it counterproductive, caused by interrupted circulation, geographical deviations, unauthorized migration, or bursts of it. The authors note that, as a result, they expose underlying policy dilemmas and emphasize the importance of understanding the various trends that provide the opportunity to shape migration in highly counterintuitive ways that are largely beyond the reach of this policy branch (De Haas et al., 2019).

The war in Ukraine has led to significant migration processes in 2022–2023, with many people fleeing the conflict and seeking refuge in neighboring countries such as Poland and Germany (Kulu et al., 2023). Poland has played a significant role in receiving war refugees from Ukraine, with around 3.5 million persons arriving in Poland between February 24, 2022, and mid-May 2022. The European Union has responded by providing humanitarian aid, emergency civil protection assistance, and support at the border, as well as granting protection to those fleeing the war and entering the EU. The EU Migration Preparedness and Crisis Blueprint provides an operational framework to ensure situational awareness, better preparedness, effective governance, and timely response (European Commission, 2023). The recent

arrival of Ukrainians fleeing the war zones to Poland is an unprecedented event that raises questions about future developments and challenges related to the presence of Ukrainian citizens in Poland. The impact of the war on Ukraine's population has been analyzed, including the effect on demographic processes such as births, deaths, and migration (Andrews et al., 2023). Overall, the war in Ukraine has had a significant impact on migration processes in the region, with many people forced to flee their homes and seek refuge in neighboring countries.

CONCLUSIONS

The article presents significant findings derived from recent scientific publications and original research materials, shedding light on the migration trends in the Republic of Kazakhstan. These findings underscore the crucial role of migration in the country's socioeconomic, demographic, cultural, and political development. The assessment of migration policy prospects reveals the shaping influence of global, regional, and national factors.

On a global scale, two primary migration patterns emerge. Firstly, intensified competition for qualified and skilled human resources is evident among both developed and rapidly growing nations. Secondly, educational migration is on the rise, contributing to the enhancement of countries' competitiveness and the development of human capital. Regionally, labor migration within the Eurasian system is notable, accompanied by challenges such as the attrition of domestic qualified personnel and a decline in the overall quality of human capital. Nationally, a negative external migration balance is observed, driven by increasing disparities in population distribution. The main migration patterns are concentrated in cities like Astana and Almaty, with a rising influx of labor immigrants from the Eurasian Economic Union and neighboring countries, often accompanied by limited control over illegal migration.

The article identifies key vectors for Kazakhstan's contemporary migration strategy, including the integration of global trends into social and economic development programs, the establishment of socioeconomic prerequisites for successful migrant reception, the promotion of seamless integration through monitoring social programs, legislative optimization, and the creation of information resources facilitating cultural adaptation. Sociocultural adaptation within the context of Kazakhstan's migration concept relies on the resources of culture and education, contributing to the formation of the Kazakh identity.

The article emphasizes the need for legal, organizational, and economic measures to address the multifaceted impacts of migration on social harmony, economic and demographic aspects, and overall national security. In conclusion, the article's findings offer valuable insights into the migration dynamics in Kazakhstan and provide a roadmap for effectively managing migration's impacts on various dimensions of the country's development.

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POVZETEK

MIGRACIJSKI PROCESI V REPUBLIKI KAZAHSTAN: ZNAČILNOSTI, PROBLEMI IN PERSPEKTIVE
Gulsara Kappassova, Meiramgul Altybassarova, Gani Yelmuratov, Madina Rakhimbaeva, Boris Polomarchuk

Avtorji v prispevku obravnavajo sodobne migracijske trende in politike v Kazahstanu v kontekstu globalizacije in vse množičnejših mednarodnih migracij po svetu. Predstavijo glavna zgodovinska obdobja in vzorce migracij v Kazahstanu in na svetovni ravni. Glavni trendi na globalni ravni v zadnjih letih so naraščajoče migracije na področju izobraževanja in delovne sile ter s tem povezano okrepljeno tekmovanje med državami za kvalificiran človeški kapital. Kazahstan beleži negativno migracijsko bilanco, pri čemer največ migracij poteka v smeri večjih mest, kot sta Astana in Almaty. Med migranti je vse več delovnih priseljencev iz sosednjih držav in širše evrazijske regije. V prispevku so analizirani znatni vplivi te migracijske dinamike na socialno-ekonomski, demografski, kulturni in politični razvoj Kazahstana. Migracije lahko pozitivno vplivajo na človeški kapital in gospodarsko rast, vendar pa je treba nasloviti tudi s tem povezana tveganja, kot so nezakonite migracije. Cilj kazahstanske migracijske politike je boljše upravljanje tega procesa, da bi zadostili potrebam gospodarstva, spodbujali preseljevanje in vključevanje etničnih Kazahstancev ter zajezili nezakonite migracije. Med prednostne naloge politik sodijo prilagajanje svetovnim trendom, vzpostavitev pogojev za podporo priseljencem, krepitev socialnih programov za prilagajanje ter izboljšanje zakonodaje na tem področju. Vendar pa so za učinkovito upravljanje mnogovrstnih vplivov migracij potrebni celoviti pravni, organizacijski in gospodarski ukrepi, osredotočeni na ohranjanje družbene harmonije, koristi za gospodarsko in demografsko področje ter nacionalne varnosti. Avtorji izpostavljajo ključno vlogo migracij v razvoju Kazahstana ter potrebo po strateškem upravljanju migracijskih procesov na različnih področjih razvoja države.

A HISTORICAL ANALYSIS OF LEFT-WING TRADE UNION POSITIONS REGARDING BANGLADESHI WORKERS IN MONFALCONE (ITALY) AND BOSNIAN WORKERS IN SLOVENIA

Loredana Panariti[I]

ABSTRACT
A Historical Analysis of Left-Wing Trade Union Positions Regarding Bangladeshi Workers in Monfalcone (Italy) and Bosnian Workers in Slovenia
The research reconstructs the employment conditions of Bangladeshis in Monfalcone and Bosnians in Slovenia and left-wing trade union positions toward migrant work. Bangladeshis work mainly under subcontract in constructing large cruise ships at Monfalcone's Fincantieri, while Bosnians work in Slovenia's building, transportation, and storage sectors. This exploratory work addresses two case studies viewed through the lens of the relationship between trade unions and migrant workers, identifying the new challenges it poses. The research also describes the geography of the different positions and their relationship with the type of work carried out by immigrants.
KEYWORDS: left-wing trade unions, Bosnian workers, Bangladeshi workers, global economic crisis, migration policies

IZVLEČEK
Zgodovinska analiza stališč levičarskih sindikatov do bangladeških delavcev v italijanskem Tržiču in bosanskih delavcev v Sloveniji
Namen prispevka je analizirati javno razpravo o zaposlitvenih in delovnih pogojih bangladeških delavcev v italijanskem Tržiču (Monfalcone) in bosanskih delavcev v Sloveniji ter stališča levičarskih sindikatov do migrantskega dela. Bangladeški delavci opravljajo predvsem podizvajalska dela pri gradnji velikih potniških ladij v tržiškem podjetju Fincantieri, bosanski delavci pa v Sloveniji delajo v gradbeništvu, prometu in skladiščenju. Raziskava obravnava dve različni študiji primerov z vidika odnosa med sindikati in delavci migranti ter opredeljuje nove izzive, ki jih ta predstavlja. Opisuje tudi geografijo različnih stališč in njihovo povezavo z vrsto dela, ki ga opravljajo priseljenci.
KLJUČNE BESEDE: sindikati, delavci iz BiH, bangladeški delavci, globalna gospodarska kriza, migracijske politike

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INTRODUCTION

Foreign workers are a significant component of the Italian and Slovenian economies (Ministero del lavoro e delle politiche sociali, 2023; ZRSZ, 2023), and their contribution to the labor market is clearly visible, although not always adequately valued. In both countries, the combination of restrictive migration policies and labor market reforms has expanded the space for the exploitation of immigrant labor (Della Puppa, 2020a; Calafà, 2016; Bembič & Stanojević, 2016). Although some crucial sectors in both economies would be crippled without the contribution of foreign labor, especially after the 2008 crisis, immigrants are accused of settling for lower wages and precarious conditions, effectively devaluating contemporary work; a "reserve army" which reduces already scarce welfare resources from the indigenous population, given their consequent higher eligibility for social assistance programs. These beliefs are prevalent in society across the board and are routinely amplified by the media, electoral campaigns, and political discourse.

Beyond the noise of media discussion, the working conditions of migrants directly affect the trade unions that tackle the issue according to their statutes and as active subjects in bargaining and the regulation of work. Such conditions are a trade union issue because migrant workers embody a large proportion of the global workforce and are among the most vulnerable in the labor market. Furthermore, protecting the rights of these workers means avoiding any possible downward competition between them and, at the same time, strengthening the trade union organizations with new participants active within them (ILO, 2020).

The issue of the relationship between migrant labor and unions is not new; several researchers have addressed it by studying both the relationship between the parties, as well as the memberships and the socio-economic conditions of the labor force in different sectors and territories (Basso & Perocco, 2003; Basso, 2007a; Basso, 2007b; Bembič & Stanojević, 2016; Bešter, 2005, Della Puppa, 2017; Della Puppa, 2018; Ferrero & Perocco, 2011). What emerges from the studies is a heterogeneity of positions and reactions, not traceable to general patterns and in close relation to the socio-economic contexts upon which they rest. These phenomena, the subject of in-depth sociological studies, have received little attention from historians except for a few important studies (Colucci, 2009; Colucci, 2019; Loreto, 2018; Boschiero et al., 2010; Jubany & Güell, 2012; Kovačič, 2018). For this reason, using the tools of historical analysis, the two case studies that are the subject of this research have been explored, paying particular attention to the dimensions and characteristics of the labor markets in which migrants are placed.

Examining trade union positions toward migrant labor, however, we are faced with a complex and articulated reality, which, on the one hand, shows a growing involvement of foreign workers, and on the other hand, it signals how, in some cases, discrimination has penetrated the organizations themselves, strengthened by the crisis and the anti-immigration campaigns of parties and governments. In both

cases examined, the relationship with migrant labor should be added to the general decline of the trade union characterized, albeit with the differences linked to different historical trajectories, a reduction in members, a decline in the industrial sector, growth in the tertiary sector, and precarious work. In addition, the contraction or stagnation of employment in the public sector should be included (Bembič, 2018, pp. 34–35; Danesh et al., 2017).

Penninx & Roosblad (2000), in *Trade Unions, Immigration and Immigrants in Europe (1960–1993)*, report three dilemmas that put trade union organizations under pressure to address the issue of migrant labor. The first concerns the attitude toward companies regarding hiring workers abroad: collaborate or resist? Collaboration can depress wages and thus weaken bargaining power, while resistance can negatively affect company growth and, consequently, workers. The second dilemma is determining what attitude to maintain toward newcomers: involve and integrate them into the union, perhaps endangering the rights acquired by local workers, or exclude them? If trade unions favor inclusion as a solution to the second dilemma and fully include immigrant workers in the union, then the real or alleged differences between native and immigrant workers will lead to the third dilemma: how to represent the different worker types? In the same way or by considering the specific needs of immigrant workers? There can be difficulties in both cases because although generalist policies may appear unfair, specific ones could alienate native support.

Since 1993, the final year of Penninx and Roosblad's research, the general picture of international migration has profoundly changed: Europe has become a continent of immigration, and in almost all its countries, the rules governing labor migration have been tightened, stimulating irregular forms of entry to which we have responded with a further closure. In any case, some of the questions the authors identified as essential for trade unions remain relevant today. However, the context has changed: the increase in the migrant workforce lies within the processes of job insecurity, technological changes, and reduction in the area of collective bargaining. These are phenomena that, in general, try to reduce the strength of trade unions by confronting them with various possibilities for evolution (Marino et al., 2017, pp. 7–11; Kralj, 2011, pp. 296–296).

The objective of this work is to examine the positions of the historically "Left" trade unions (with all the distinctions that the concept now brings with it) toward Bangladeshi immigrant workers at the Monfalcone shipyard (Italy) and Bosnian workers in Slovenia. The former are mostly employed under contract and subcontract in the construction of the large cruise ships of Fincantieri, and the latter in the

construction and tourism sectors.[1] This exploratory work addresses two different case studies through the lens of the relationship between trade unions and migrant workers, identifying the new challenges it poses. A picture emerges, still only partly delineated, e.g., the positions of smaller trade unions or migrant associations need to be examined, which nevertheless highlights two important specific issues. The first concerns the irreversible change that the crisis has brought, intensifying distortions and dualism in the labor market of the respective countries. The second highlights the growing contradiction between acquired and enforceable rights and the need to maintain native and immigrant workers together (Della Puppa, 2020a; Della Puppa, 2020b; Bembič & Stanojević, 2016).

We know the "Left" is an increasingly more complicated term to define and clarify. However, within the trade union organizations present in Italy and Slovenia, the CGIL (Confederazione Generale Italiana del Lavoro)[2] and the ZSSS (Zveza Svobodnih Sindikatov Slovenije) can be considered in a general sense as being oriented toward the Left[3]. They are also among the most representative to develop elements of the internal debate on migrant workers that are dealt with in both trade unions. While the historical trajectories of both organizations are relevant, we will limit ourselves to the two realities related to the period beginning with the 2008 crisis. Both Bangladeshis and Bosnians have always been considered "complementary" and not "substitutes" for the indigenous labor force, where complementary means they end up being employed almost exclusively in the heaviest and worst-paid jobs (Avola et al., 2005; Colombo & Della Zuanna, 2019; Pajnik et al., 2010; Medica & Lukič, 2011).

According to this point of view, the presence of immigrant workers satisfies an unmet demand and is helpful for the growth of the economy as a whole by solving, or at least countering, the imbalances in the labor market on which it is based. With the crisis, however, the idea that immigration has a competitive effect has strengthened, reducing employment opportunities for natives and lowering average wages.

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1   The workers involved in the Fincantieri subcontracting in Monfalcone are all males, while in Slovenia, the majority of Bosnian male workers are joined by a smaller number of women employed especially in services. For Bangladeshis, thanks also to the rules on family reunification, women in 2020 were over 42% of the group. In Slovenia, family reunification concerns those who have a permanent residence permit, while the numerous temporary workers are almost always alone.

2   The Italian General Confederation of Labor (Confederazione Generale Italiana del Lavoro; CGIL) is a national trade union based in Italy. It was formed by an agreement between socialists, communists, and Christian democrats in the "Pact of Rome" of June 1944. In 1950, socialists and Christian democrats split, forming UIL and CISL. These defections left the CGIL almost entirely dominated by communists, though it retained a significant socialist minority within its ranks. The CGIL is the largest Italian labor federation, but, as we will see, over time, it has changed some of its characteristics (Loreto, 2017).

3   The Association of Free Trade Unions of Slovenia (Zveza svobodnih sindikatov Slovenije, ZSSS) is the largest national trade union confederation in Slovenia. Founded on April 6, 1990, it was formed from the remains of the old Yugoslav-era unions, but is now a voluntary and democratic organization, independent of political parties, parliament, government, and religious communities (Tomc, 1994).

In Slovenia, laws and regulations were promulgated in defense of indigenous workers. Soon afterward, a bilateral agreement was reached with the government of Bosnia and Herzegovina, which put Bosnian workers in the position of not being able to fully exercise their economic and social rights and be, in their first year of stay, at the complete mercy of their employers. In Monfalcone, separate paths within the labor market were de facto strengthened with different rights and various types of protection. The labor market passed, according to Stefano Zamagni's definition, from having a pyramidal structure with a vertex, base, and substantial intermediate category and offering greater possibilities to change position within it, to one that has the shape of an hourglass, with two ampoules which, ideally, contain very different workers from the point of view of rights and wages.

In the hourglass, the immigrant workers stand at the base with little chance of gaining a better position. They are considered, even by many of those who stand just above in the lower bulb or who have seen their position collapse downwards due to the crisis, as one of the elements triggering the process of job insecurity (Zamagni, 2011, pp. 5–6; Corvino, 2017, p. 76).

BANGLADESHI IN MONFALCONE

The Bangladeshi community in Italy, present since the late 1990s, is the largest in the European Union and has experienced rapid growth: between 2002 and 2021, it increased fivefold, from 22,000 to 138,000 regulars. At first, these were unmarried, childless, middle-class men who migrated to improve their personal status and support their families through remittances; now, thanks to family reunifications, they are households with closer and more stable relationships with their places of arrival. A stronger presence of irregular migrants and frequent applications for international protection also characterizes more recent immigration. Bangladeshi workers, rooted and concentrated in certain territories and specific economic sectors, in Monfalcone are mainly employed in the construction of cruise ships in Fincantieri (Della Puppa, 2014; Ministero del Lavoro e delle Politiche Sociali, 2022).

As of January 1, 2020, 7,353 foreigners were residing in Monfalcone, which is 26% of the resident population. The largest foreign group, with 3,188 registered people, was the Bangladeshi, representing more than 43% of all foreigners in the city. The Bangladeshi are a growing presence: in 2004, there were 382, compared to a nucleus of just 17 men in 1998 (Quattrocchi et al., 2003; Attanasio, 2017).

Figure 1 shows how in Monfalcone from 2004 to 2020, against a slight increase in the number of residents (27,401 in 2004 and 29,233 in 2020), the share of foreign residents increased and, among them, Bangladeshi ones. The growth of the Bangladeshi community has also depended on family reunification and marriages, as can be seen in the constant increase in women over time.

The available data record exclusively the residents, to which must be added the domiciled persons. These are usually people already present in other Italian cities, coming to Monfalcone to find a more stable job, or workers from other yards of the Fincantieri group, moved to Monfalcone by the contractors for more or less prolonged periods and a quota of illegal immigrants. The estimation, although uncertain, proposes a global figure of around five thousand units.

It is interesting to note how the number of Bangladeshi residents increased during the years of the crisis (with a slight decline in 2012), demonstrating how it amplified that profound upheaval, albeit started previously, of replacing precarious and poorly paid work for that more protected and permanent.
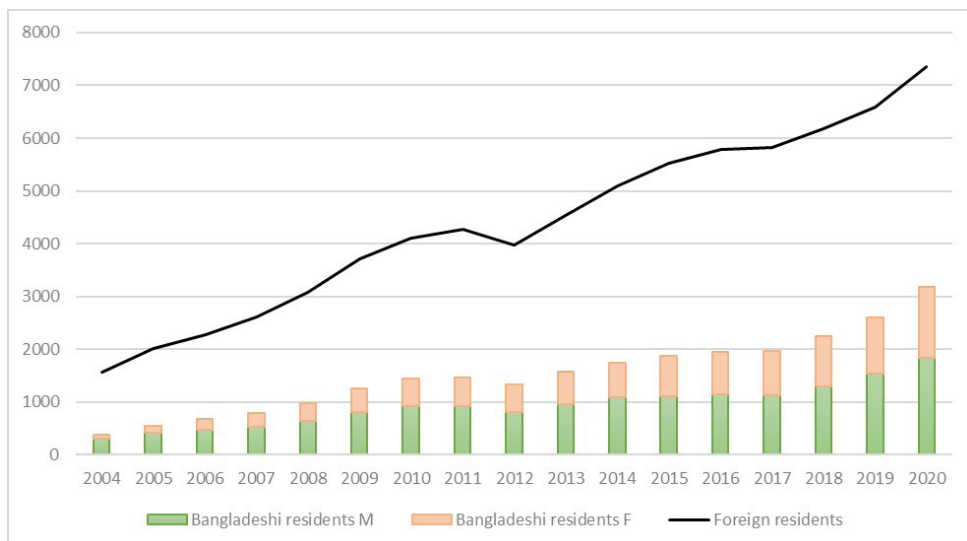

Figure 1: Foreign residents in Monfalcone 2004–2020. Data: ISTAT. Stranieri residenti al 1° gennaio. http://dati.istat.it/index.aspx?queryid=7608

The community, of course, is not a completely compact body and contains differences and divisions, i.e., variations in region of origin, wealth, the role of religion in daily life, and the level of education. Together with a large majority of people in often precarious employment, we also find some small entrepreneurs, shopkeepers, and owners of shops, houses, and apartments.

THE DEBATE ON WORK

The presence of such a high number of foreigners in the city depends on the continuous growth of contracting and subcontracting, which became established almost simultaneously with the shipyard's specialization in the construction of cruise ships. Since the second half of the 1980s, partly in response to Asian competition in other

productions, Monfalcone has specialized in the production of cruise ships, irreversibly changing the organization of work. Because of its characteristics and size, the shipbuilding industry faced the challenge of organizing and regulating its workforce early on. A workforce now composed of an increasingly small nucleus of direct employees, partly employed in the construction of the hulls, but above all in control of work, administration, research and development activities, and a galaxy of small and medium-sized contractors. The latter, for the most part, although operating in the shipbuilding industry within the shipyard itself, apply very different forms of work organization and wage treatments and, in many cases, are characterized by the absence of protection and guarantees. The complexity of the multi-tiered chain of contracts and subcontracts distances the principal from responsibility for violating collective bargaining agreements. The fact that the victims are mostly foreign workers frowned upon in the city and discriminated against in access to welfare by the city administration makes it much more difficult for the union to promote solidarity and joint struggle between direct and contract workers. Labor market reform laws and the regulation of so-called economic migration have punctuated the tightening of conditions for Bangladeshis in the shipyards. The system of migration containment and legislative changes closely linking residence and work have increased the vulnerability of these workers who, worried about losing their jobs and plunging into a situation of irregularity, have often been forced to accept very severe exploitative conditions.

The type of contract with which Bangladeshi workers are hired is mostly on a fixed-term basis, with an increase in temporary work in recent years. Data from the Friuli Venezia Giulia Region Labor Market Observatory regarding Monfalcone (see Figure 2 and Figure 3) confirm the precariousness of the work of all third-country nationals and the great attraction that the Monfalcone shipyard continues to exert. The use of foreign workers has grown, even though planned entries for work purposes have been drastically reduced in Italy, and the system used (the annual definition of quotas) is so complex and cumbersome that it has made regular labor migration very complicated. In fact, in the last ten years, admissions for work have decreased by 97%, while those for family and humanitarian reasons have increased (Fondazione Leone Moressa, 2021).
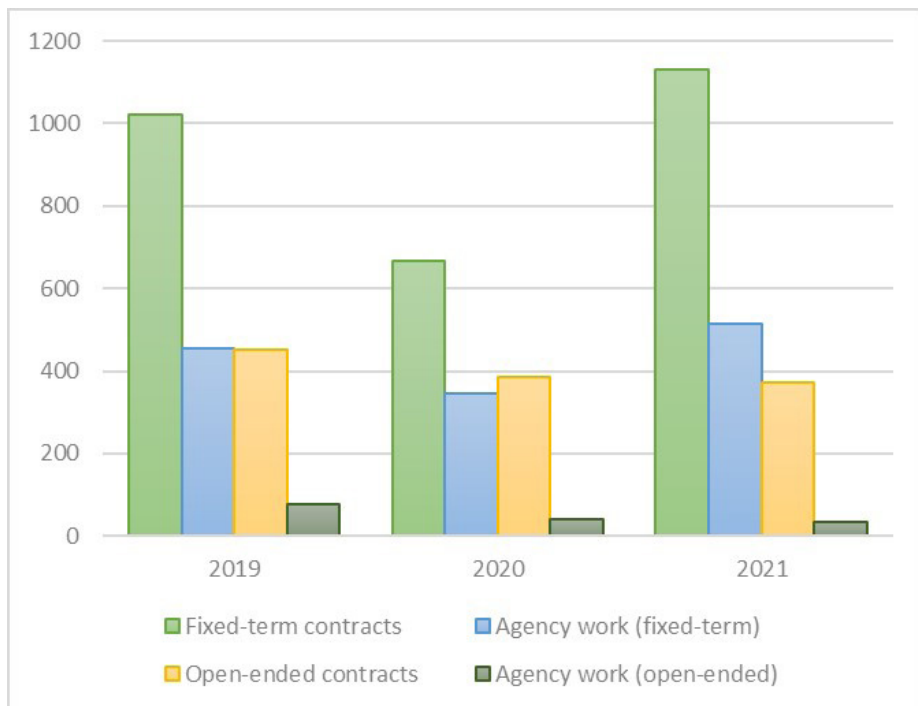
Figure 2: Contract type (Bangladeshi workers). Data: Osservatorio del Mercato del Lavoro della Regione Friuli Venezia Giulia (2021).
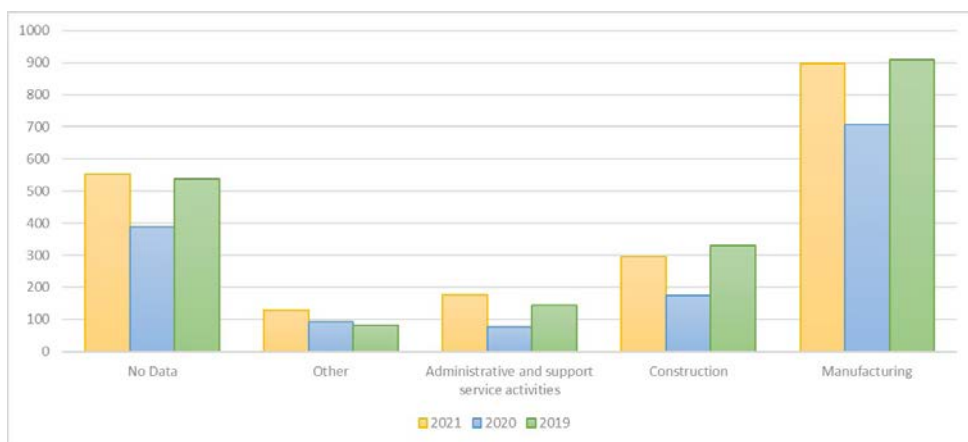

Figure 3: Fields of work (Bangladeshi workers). Data: Osservatorio del Mercato del Lavoro della Regione Friuli Venezia Giulia (2021).

Bangladeshi workers are considered the culprits in the increasing precariousness of work, not only according to the Northern League, but the debate has also involved the political forces and the unions. The presence of so many foreign workers with their families in Monfalcone follows a growth in orders in the city's shipyard, which, since the end of the 1980s, has specialized in the production of cruise ships. The construction of the "princesses" of the sea, real traveling tourist cities, requires the contribution of many workers who do not depend directly on Fincantieri but are employed under contract and subcontract (Panariti, 2011, pp. 242–243). Foreigners are employed in the most strenuous work. They are often the worst paid, with phenomena including "illegal hiring" and exploitation, which have already come to the judiciary's attention (Panariti, 2021, pp. 273–274).

Some citizens protest against this population on account of its religious, cultural, and social traditions, which citizens perceive as being "different" and, therefore, the Bangladeshi workers are considered responsible for the supposed "degradation" and have long been the subject of discussions in the city, in bars and social networks. However, such discussions had never before reached the extreme language used after the victory of the Right in the 2016 municipal elections. The fight against immigrant workers seems to be one of the reasons that allowed the Right to win the Municipality and undermine the tradition of the Left, which was one of the characteristic elements of the city.

The global economic crisis has deeply eroded the industrial fabric of the Monfalconese, with the closure of some important companies. On the other hand, despite some difficult moments, Fincantieri and its subcontracting companies have continued to grow and attract foreign labor, especially. More "malleable" workers, as they were defined by the provincial secretary of the CGIL, probably referring to the lack of unionization of foreigners and the title of the article: "There is work on site, but our unemployed are not hired" refers to the difficulty of reemployment for workers made redundant by some medium-sized companies in the area ("Casotto", 2019). Retirement is still a distant goal for the latter, while job relocation is complicated not only by the crisis but also by their age and type of training. For this reason, the public discourse (political and union) focuses on the need to "force" Fincantieri, a primarily public company, to hire the unemployed directly arising from those corporate crises. At the same time, the fact that Fincantieri outsources so much work to external firms that hire foreigners to the detriment of local citizens is much criticized.

In the province where Monfalcone is located, the unemployment rate has gone up, with even higher peaks, from 3.9% in 2006 to 8.2% in 2016, and although the 2018 data indicate a return of employment to pre-crisis levels, more in-depth qualitative analyses highlight the greater growth in risky and, often, underpaid work (Cappi, 2017, p. 248).

Workers who have lost their jobs in local factories look to Fincantieri as a possible place for relocation. In addition, the presence of a very large group of foreigners, mostly Bangladeshi, who are more willing to accept precarious and insecure working

conditions, has begun to enter the public debate, first political and then trade union (TGR FVG, 2019). Thus, the union finds itself in the balance between protecting the weakest, bargaining for its members, and the need to negotiate relocation places for those who have lost their jobs. This balance is delicate because the different trajectories can collide. In a situation of objective contraction of resources, the needs and interests of employed workers or the unemployed far from retirement do not always go in the same direction as those of workers in precarious jobs, the unemployed, and foreigners. Forecasts in this direction are difficult; however, it is perceived how the pushes toward a more "universalistic" union collide with those of an increasingly varied economic reality that requires very different representation experiences.

The contradiction came to light precisely on the shipyard where the company has repeatedly justified the presence of a significant number of foreign workers under subcontract with the difficulty of finding skilled workers in the local labor market. Moreover, they accused the direct employees of being absent and unproductive. In a situation of this type, the continuous use of direct employees, who are the most unionized, reduces the union's strength.

The most representative trade union of the Monfalcone yard was, for a long time, the FIOM (Federazione Impiegati Operai Metallurgici). It is now surpassed, albeit slightly, by the FIM (Federazione Italiana Metalmeccanici), which represents more members among white-collar employees. The FIOM is considered the "redder" union in the CGIL, but the pressure of workers coming from the crisis largely enrolled in the FIOM led them to approach the slogan of the Northern League "Italians first" (Boschiero et al., 2010, pp. 31–34; Zazzara, 2018, pp. 101–102).

An examination of electoral flow data in the European elections (2019) presented by Ipsos reveals that among CGIL members, the Democratic Party and the Left share the primacy with almost 58%, but 38.4% voted with the Northern League (18.5%) and the Five Stars (19.9%). The trade union, indeed, is increasingly perceived as a service provider rather than as a transmitter of values or a political entity. So, there is no inconsistency, according to its members, to be part of the CGIL, appreciating their help at work, and then voting for the Right (Il Fatto, 2019). We do not have precise data for the Monfalcone area. Moreover, the support of the FIOM for the policies of the Northern League mayor, which aims to reduce the number of foreigners and replace them with native workers, has also been covered by the national press and television. Articles and interviews speak about the Northern League with the red sweatshirt, recalling the sweatshirts worn by FIOM militants in demonstrations (Linkiesta, 2019).

The issue of values ignites the debate within the union itself. Also, in the small microcosm of Monfalcone, especially from the CGIL Federation of School and University (FLC – Federation of Knowledge Workers), voices of dissent have been raised that have never conducted a direct comparison. During the conference with the eloquent title "From foreigners to citizens," organized in Monfalcone by the FLC, the question of union values had been raised without a debate.

The unresolved issue lays bare the left-wing union's model of consultation and policy incompatible with the unionization of subcontracted workers. Agreements between the unions and the company repeatedly mention the need to increase the employment of direct workers and reduce subcontracting, indicating a gradual weakening of demands and difficulty in finding alternative solutions. Of the rest, the worsening of exploitative conditions has been punctuated by labor market reform laws: the strengthening of fixed-term contracts, the introduction of temporary, intermittent, and ancillary work, and, above all, the lifting of the ban on subcontracting in Law 30/2003. Regulations that facilitated productive disintegration and complicated the fight against illegality.

BOSNIANS IN SLOVENIA

If we talk about "Bosnians" or "Bosnian-Herzegovinians," we are referring, at least in theory, to all citizens of Bosnia and Herzegovina, as it is written in the country's Constitution. However, the dissolution of Yugoslavia, the wars that followed, and the delicate balance between citizenship and nationality present in Bosnia since the republic's creation in the Yugoslav federation make things much more complicated. It may happen that the term Bosnian is used to define only the country's Muslim population (Nuhefendić, 2008). Here, however, the discriminating element is citizenship, and when we refer to Bosnian workers in Slovenia, we are talking about all workers who are citizens of Bosnia and Herzegovina.

Workers from Bosnia began arriving in Slovenia in the late 1960s, and in the following decade, Bosnia became the most important immigration country for Slovenia (Dolenc, 2007, pp. 80–82).

Slovenia has always been an immigration destination for citizens of other Yugoslavian republics, especially after other European countries had inaugurated restrictive policies on foreign labor. The reasons for the move were the possibility of free professional training, scholarships for education, and, above all, jobs in the construction, agriculture, catering, and tourism sectors (Malačič, 2008, pp. 46–47).

After the independence of Slovenia in 1991, immigrants who had permanent residence could apply for and acquire Slovenian citizenship. Some of them, however, have been removed from the registers and have lost all civil and social rights. These are the so-called *izbrisani* ("erased")—non-Slovenian citizens who either refused to apply for citizenship or were unable, due to the war, to obtain the necessary documentation in their country of origin or had supposed that, as in the past, the rights they had enjoyed up to that moment would be sufficient for the permanent residence permit. Nearly 18,000 people from other republics lost all their rights related to permanent residence—it has been maintained that the original number of 30,000 had been reduced after 12,000 of them had left. Therefore, they would have had to redo all the necessary documentation for health care, welfare, work permit, etc.,

following the law for the employment of foreigners (July 1, 1992), which provided for a very short period of regularization (Zorn, 2003, pp. 85–86; Vidmar & Učkar, 2014).

The precarious existence of these men and women, who in some cases were not even aware that they had become "foreigners," was resolved in the following period as new Bosnians reached Slovenia due to the war. The refugees, about 70,000 people in 1993, with many women and children, partly left the country in the following years to return to their homeland or emigrate to other states. In 2002, those who remained were regularized after a long period of marginalization and, probably, illegal work.

After Slovenia's independence in 1991, there began further immigration from Bosnia, strengthened especially in 2004 after its accession to the European Union.

LEGISLATION AND WORKING CONDITIONS

Regulations on the employment of workers in Slovenia from third countries have undergone several changes over time in relation to changes in the labor market, the country's economic situation, and joining the European Union.

Let us briefly recall the introduction of quotas in 2001: permits for foreign workers could not exceed 5% of the active population, and in 2001, this percentage was approximately 41,000 people.

This law established one of the basic principles of subsequent Slovenian immigration policy: namely, the separation between those who already lived and worked in the country with a permanent permit, who were equalized to Slovenian workers, and new hires who, instead, were subjected to much stricter procedures. Although with several changes, the planned system remained in force until 2011, when it was replaced by a new legislative provision (Uradni list Republike Slovenije, 1992).

Post-independence Slovenian economic growth had made many jobs available for unskilled labor and increased the quotas available for foreign workers. With the crisis in 2008, the situation of these workers, primarily employed in construction, worsened, and many were fired.

The anti-crisis measures launched to protect domestic workers were accompanied by discriminatory rhetoric from government officials. Hilda Tovšak, general secretary of the Slovenian Christian Democrats, director of the Vegrad construction company, and then a leading figure in the purchase of the same after its bankruptcy, publicly stated that the Bosnians earned 600 euros a month and, not happy, they also wanted to play their Bosnian music like crazy. She concluded: "They live in places with a higher cultural level, so they don't bring their habits with them" (Mihajlović, 2008). The "building baroness," the name the media gave to her, was subsequently sentenced to eight years in prison for embezzlement, money laundering, misuse of European funds, and numerous other counts. The workers, mostly Bosnians, were mistreated and often forced to wait months for their salary. They lost their jobs after the bankruptcy of Vegrad and its affiliates. Having no personal residence permit, the

workers had no right to unemployment benefits and had to be repatriated. The issue was resolved after a long strike, thanks to the government's intervention.

At the end of 2011, valid work permits for Bosnian citizens were more than 51% of the total (17,625 out of 34,266). Of these, however, almost 80% were personal permits, i.e., permits relating to a fixed-term or permanent job, but which, in any case, being granted to the person, guaranteed a better standard of access to welfare than those that were instead issued to the employer.

The law of 2011 kept the quota system in force, abolishing the possibilities of seasonal work in the tourism and construction sectors and inserting very stringent rules for employers wishing to hire foreign labor. This caused, in three years, a vertical drop in work permits issued, which fell by 33.4% (ZSRZ). This restrictive law was accompanied by an agreement between the government of the Republic of Slovenia and the Council of Ministers of Bosnia and Herzegovina on the employment of citizens of Bosnia and Herzegovina in Slovenia. The agreement identifies procedures and quantities of Bosnian workers to be employed in Slovenia and aims to reduce the exploitation of workers and guarantee them better working conditions and permanence. The recruitment of workers takes place through collaboration between Bosnian and Slovenian labor agencies and introduces the concept of circular migration (Uradni list Republike Slovenije, 2012; Kačapor-Džihić & Nermin, 2012).

The two agencies track the workers together, even after their permit has been granted, and they facilitate the acquisition of skills that can be used in a possible return to their country. The work permit for these workers, the largest group among foreigners employed in Slovenia, is valid for three years. However, during the first year, they must remain employed by a single employer. If they lose their job in the first year of activity, they must return to their homeland, while after three years, they can ask for a new three-year permit. Having to depend on a single employer for a full year puts workers in a state of extreme dependence; they are forced to accept lower wages, late pay, and, sometimes, no pay at all. As the unions, especially the ZSSS, have repeatedly pointed out, although the agreement aims to increase protection for Bosnian workers, in reality, workers in their first year in the country must accept every situation regarding security, wages, and working hours. Indeed, if they are sacked and have not found a new job within thirty days, they are forced to return to Bosnia, where they can only leave again after six months. Theoretically, if fired through no fault of their own, they would have the right to get unemployment benefits in Slovenia and look for work again in the country. The fact, then, that many companies shut down their business and then reopen under another name puts migrant workers at a further disadvantage. It may happen that they cannot even recover wages and contributions or have to work illegally. Furthermore, the workers often have no residence and live in makeshift accommodations made available by the employer or in a hostel for workers under deplorable sanitary conditions (Mulabdić, 2015, pp. 58–60).

Figure 4 and Figure 5 show the increasing number of Bosnian workers who arrived in Slovenia thanks to this agreement. Over time, they came to represent almost all the third-country workers in Slovenia. The sectors of activity most represented are those of manufacturing, building, and construction, also in line with the declared level of education, which in most of the annual permits issued specify completion of compulsory education or one or two years of qualification.

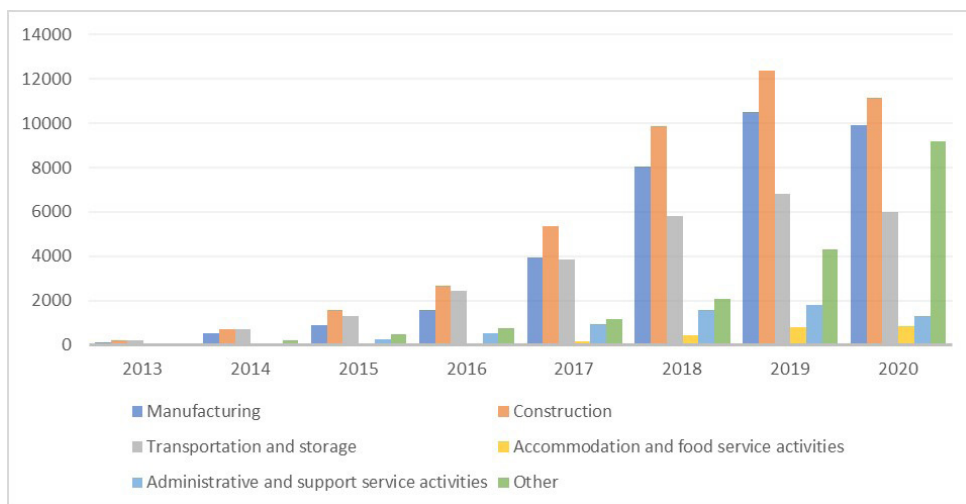Figure 4: Valid work permits 2013–2020. Data: ZRSZ. Trg dela v številkah-ZRSZ. https://www.ess.gov.si/partnerji/trg-dela/trg-dela-v-stevilkah

Figure 5: Fields of work (Bosnian workers). Data: ZRSZ. Trg dela v številkah-ZRSZ. https://www.ess.gov.si/partnerji/trg-dela/trg-dela-v-stevilkah

The lack of knowledge of the language and their rights makes Bosnian workers highly vulnerable. For this reason, in 2011, the ZSSS and Slovenska Filantropija (SF) created a Labor Counselling Service for migrant workers, refugees, and asylum seekers. In 2013, the service became an info point for foreigners funded by the National Employment Agency with offices nationwide.

The growth path of this organization is very interesting for our analysis. Now, the Delavska svetovalnica (Labor Counselling Service), which has since removed the reference to migrants from its name, is active thanks to the quotas of its members. It offers advice to all vulnerable workers. As we have read in many interviews with its founders, the central element of its activity is the rights obtained for vulnerable workers. So, when the project's financing ended, the Delavska svetovalnica activists decided to become independent.

Although in the first period of activity, they thought of organizing themselves as a real union, they decided instead to maintain the status of an association to have easier access to financing and a more fluid structure. This decision was because they preferred to have a less structured focus and to be closer to the workers in flesh and blood; also, because differences from the ZSSS became more and more marked.

The ZSSS, which had to protect its members from the restrictive policies imposed by Europe and defend the occupational standard inherited from the previous system, had delegated support for migrant workers to an external body that is not a union, even if some speak of a quasi-trade union (Sokler, 2019, pp. 29–36). Delavska svetovalnica lives off the membership fees of its members. Despite maintaining collaboration with the ZSSS and other institutions, it is completely autonomous, and while the other trade union organizations suffer from a decline in membership, it is expanding.

CONCLUDING REMARKS

The article evaluates the tense dynamic between trade unions and foreign labor by presenting two case studies with particular characteristics that highlight the tensions and options involved in this relationship. It examines left-leaning trade unions, disregarding newly developed minor organizations with alternative paths and visions versus historical unions. The latter, however, are the most representative, dealing with the problems experienced by the entire trade union world, and can tell us a lot about the prospects of the report under consideration. We addressed a specific reality in two separate settings: the Monfalcone shipyard and its Bangladeshi workforce and the situation in Slovenia, where most of the foreign workforce comes from Bosnia and Herzegovina.

In Monfalcone, the model of marked segmentation of the labor market on an ethnic basis has favored the differential exploitation of immigrant workers. The shipyard has experienced, alongside the fragmentation of the production process,

the racial stratification—and segregation—of its workforce. Foreigners are weak and vulnerable, accepting and suffering discrimination and abuse in the division of labor, wages, and the exercise of their rights.

At various levels, a picture emerges characterized by progressive forms of labor and social precariousness. This involves low training, safety, and pay levels and the absence of protections guaranteed by the standards set by national legislation. In the system of contracts and subcontracts that characterizes the site's production, immigrants are mainly entrusted with the least skilled or most difficult tasks, with a downward polarization of working conditions, the entrenchment of exploitation and illegal work, with Bangladeshis at the bottom rung of the hierarchical ladder of work.

The union is faced with a complex reality in which the only instrument to counter exploitation seems to be the repressive one, i.e., reporting abuses to the judiciary. The immigrant workers, supported by the union, denounced and brought civil action, and the trials ended with severe penalties, all without affecting the existing organizational and production model.

The tightening of exploitative conditions at the worksite has been punctuated by labor market reform laws: the strengthening of fixed-term contracts, the introduction of temporary, intermittent, and ancillary work, and, above all, the lifting of Law 30/200's ban on labor subcontracting.

As Cillo & Perocco (2016) and Dorigatti (2018) note, trade unions have been faced with the challenge of elaborating a strategy to combat the inequalities present in the subcontracting system, taking into account both the stratification of precariousness produced by the organization of labor and the racial segmentation of the labor market. As noted, the first knot to be unraveled concerns the relationship between direct employees, almost all Italians and unionized, and contract employees, almost all foreigners and much less unionized.

Furthermore, it should not be underestimated that neither the workers nor the organizations are immune to discrimination. At the same time, the intensification of institutional and popular racism in the city in recent years (Panariti, 2021) has led to a sort of "reflex inertia" (Gjergji, 2015) in the union. Inertia is defined as an inability to put immigrant workers' reception, integration, and unionization programs at the center, as has happened in other parts of Italy in addition to labor claims. For years, claims have centered on the need to reduce the use of contracting, bring some of the work back in-house, and thus increase the number of direct employees. In Slovenia, protecting migrant workers is also an issue of great interest to trade unions. Slovenia's segmentation of the labor market is regulated ex lege in a discriminatory manner. It has led to the compartmentalization and isolation of immigrants, especially Bosnians, who represent the largest percentage and who are traditionally employed in jobs characterized by precariousness, low pay, heavy and dangerous work, and social penalization (Kanduč & Bučar-Ručman, 2016).

Within the ZSSS, an EU-funded project created an entity (Delavska svetovalnica), which now runs independently. While maintaining relationships and contacts with the ZSSS, it operates independently and deals not only with migrant workers but with labor exploitation more generally. The fact that the attention paid to the most fragile sections of the workers has somehow left the perimeter of trade union activity itself was the subject of a long article by Marko Tanasić, which appeared on the ZSSS website (Tanasić, 2017). Tanasić, who deals with migrant labor within the trade union organization, made specific proposals, noting that the union had to get out of its comfort zone and get closer to the changes taking place in the world of work. In his opinion, it was up to the ZSSS to take on a leading and coordinating role between the different bodies and associations, going beyond the project phase to articulate an internal path of inclusion and unionization of migrant workers. A network capable of involving workers, families, organizations, and institutions and working, in collaboration with other European trade unions, on a shared platform of requests.

Repeated labor reforms have also accentuated the processes of precarization and, according to some (Visser, 2019, p. 54), have encouraged the idea that trade unions work for their members but not for non-members and, thus, are only committed to certain specific interests. Again, labor market segmentation has magnified the differences between those with well-organized and influential trade union representation and a better contractual status linked to their position in the labor market compared to those in precarious and exploitative situations. If openly, at least, the main challenge of the trade union movement is to build solidarity, unity, and better working conditions for all, the essential question is linked to the methods of organizing trade unions, the methods of organizing foreign workers, and the strategies to overcome fragmentation.

ACKNOWLEDGMENTS AND ADDITIONAL INFORMATION

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POVZETEK

ZGODOVINSKA ANALIZA STALIŠČ LEVIČARSKIH SINDIKATOV DO BANGLADEŠKIH DELAVCEV V ITALIJANSKEM TRŽIČU IN BOSANSKIH DELAVCEV V SLOVENIJI
Loredana Panariti

Članek obravnava javno razpravo o zaposlitvenih in delovnih pogojih bangladeških delavcev v italijanskem Tržiču (Monfalcone) in bosanskih delavcev v Sloveniji. Raziskava obravnava dve različni študiji primerov z vidika odnosa med sindikati in delavci migranti ter opredeljuje nove izzive, ki jih ta predstavlja. Gospodarska kriza je okrepila prepričanje, da priseljevanje zmanjšuje zaposlitvene možnosti domačinov in znižuje njihove povprečne plače. To je v Sloveniji privedlo do sprejetja pravil in predpisov za zaščito domačih delavcev, čemur je sledil dvostranski sporazum z vlado Bosne in Hercegovine. To postavlja bosanske delavce v položaj, v katerem ne morejo v celoti uveljavljati svojih ekonomskih in socialnih pravic. Tako so v prvem letu dela v popolni nemilosti delodajalcev. V ladjedelniškem Tržiču je trg dela segmentiran po etničnem ključu, pri čemer bangladeški delavci zasedajo najtežja in pogosto najslabše plačana delovna mesta.

Stališča sindikatov in levice pa so protislovna, saj v isti organizaciji najdemo različne ideje: od obtoževanja migrantskih delavcev, da so »preveč prilagodljivi« in da razvrednotijo delo, do zavzemanja za zaščito njihovih pravic.

Sindikati se bodo morali soočiti z odločitvijo, ali bodo branili delovna mesta in delavce na globalni ravni ali pa se bodo borili izključno za izboljšanje delovnih pogojev svojih članov z neokorporativističnega vidika.

MIGRATIONS, CITIZENSHIPS, AND THE RIGHT AND CHOICE TO PLAY FOR A NATIONAL FOOTBALL TEAM WITH A FOCUS ON THE CROATIAN NATIONAL TEAM

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ABSTRACT
Migrations, Citizenships, and the Right and Choice to Play for a National Football Team with a Focus on the Croatian National Team
Contemporary national football teams mirror numerous migration processes. The research was focused on the formation of football teams, examples of migrations of national team members, and changes in international rules (civil and sports citizenship, options of playing for the national team). The analysis of examples of footballers who have chosen to play for a country other than their country of birth shows multiple practices. However, the most prominent choice is to represent their parents' country of origin. The research results contribute to studies on obtaining privileged citizenship and opportune citizenship, to integration theories, and to studies of elite migration.
KEYWORDS: citizenship, sports citizenship, national football team members, right to choose a national football team, privileged citizenship

IZVLEČEK
Migracije, državljanstva ter pravica in izbira igranja za nacionalno nogometno reprezentanco s poudarkom na hrvaški reprezentanci
Sodobne nogometne reprezentance odražajo številne migracijske procese. Avtorja se v raziskavi osredotočata na sestavljanje nogometnih reprezentanc, primere selitev nogometašev v druge reprezentance ter spremembe mednarodnih pravil (državljanstvo zaradi razlogov na področju športa, možnosti za igranje v reprezentanci). Analiza primerov nogometašev, ki so se odločili za igranje za državo, ki ni njihova matična država, kaže, da se nogometaši odločajo različno, najpogosteje pa si izberejo igranje za državo, iz katere prihajajo njihovi starši. Rezultati raziskave prispevajo k študijam pridobivanja privilegiranega in oportunega državljanstva, k teorijam integracije ter k študijam migracij elit.
KLJUČNE BESEDE: državljanstvo, športno državljanstvo, člani nogometnih reprezentanc, pravica do izbire reprezentance, privilegirano državljanstvo

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INTRODUCTION

Today's population of modern European countries results from numerous immigrations and confirms that we live in an age of global migration (for more information on migration patterns, see King et al., 2010; Castles et al., 2014; Hollifield & Foley, 2022). Migration processes are also evident in many athletes of immigrant origin and immigrants in the line-ups of certain present-day national teams. National teams represent the country/nation whose kits the athletes wear and are an important symbol of national identity, their victories strengthening a sense of national pride. Furthermore, the issue of immigrant integration is one of the most important issues of the modern European society. To be legally and politically integrated, an immigrant must also obtain the citizenship of the receiving country (Penninx & Garcés-Mascareñas, 2016). On the other hand, for a player to be a national team member, the citizenship of the country of that national team is not enough. Such a player also needs that country's "sports citizenship" (Medić, 2017). After clarifying the legislative context of the research, the difference between these citizenships, and the formal options of playing for a national football team, this paper will try to investigate the relationship between the two citizenships as well as the right and choice to play for a national football team in the context of migration processes. From the first migration of players into football clubs to the formation of national football teams, it uses examples of migrant national team members to present how the international rules of FIFA (Fédération Internationale de Football Association) have changed. The paper's central goal is to investigate and analyze the reasons for a player's choice to play for the national team of a country other than the country of their birth, which shall be done using specific examples/real experiences of national football team members. Investigating the differences in the options of obtaining and choosing citizenship, we will examine the options of obtaining privileged citizenship and opportune citizenship and indicate the need to question the current citizenship policies aimed at migrant integration (Džankić, 2019), the theories of integration, especially the legal, political, and identification aspects (Penninx & Garcés-Mascareñas, 2016), with regard to the citizenship industry (Džankić, 2019), citizenship, and national identity (Koska, 2012; Decimo & Gribaldo, 2017; Slootman, 2018). The concept of this paper goes beyond previous research, only fragments of which relate to the aims of our paper. Previous research has studied the migration of professional foreign footballers (cf. Lanfranchi & Taylor, 2001; Dietschy, 2006; Taylor, 2006; Storey, 2011), the relationship between citizenship in sport and the right to play for a national team from the aspect of the international sports law (Medić, 2017), and the identities of national team members from the diaspora (Komar, 2015).

We found the collection of works that connects football and contemporary processes of international migration (cf. Elliott & Harris, 2015) useful as a starting point for the paper. These works discuss the social and ethnic affiliation in the context of transnationalism of the second generation of migrants, transnational

continuities, ethnic reification, and local connections (cf. King, 2000; Wessendorf, 2007). Certain works indicate that the processes of denationalization, de-ethnicization, and deterritorialization are visible in contemporary sports (Poli, 2007; Bašić, 2015). They indicate a disconnection between the geographical origin of athletes and the countries they should represent (Poli, 2007). Research into globalization, migration, and identity processes shows that constructing nationals as citizens instead of members of an ethnic group collides with imagining the nation-state (cf. Bauböck, 2019; Džankić, 2019). On the other hand, some European countries, such as Croatia, invite the descendants of emigrants (grandchildren and great-grandchildren) from other continents to return and believe that their integration is unnecessary as they are granted citizenship (cf. Rajković Iveta & Gadze, 2014; Rajković Iveta, 2019). These practices indicate a need for deeper research and linking of the topics of acquiring citizenship, the process of integration, transformation, and dynamism of identity (cf. Eriksen, 2001; Decimo & Gribaldo, 2017; Slootman, 2018) in migration contexts. This paper aims to contribute to such research. It discusses the personal/family migration context as a resource. In contrast, citizenship and the choice of a national team for which one will perform are discussed as a subjective and situational career strategy.

The paper covers the period from the end of the nineteenth century until today, emphasizing the contemporary period. It is based on analyzing various sources: legal acts of international and national football organizations, state regulations, and published literature. We mostly learned about the experiences of international footballers by analyzing the media discourse (Bryman, 2012), which we did by searching interviews with national team members who are immigrants or have a migration background. Analyzing information from different media (e.g., social networks and portals) helped us confirm and compare information and prepare questionnaires for interviews with Croatian national team players. Part of the paper is based on the experiences of footballers, Croatian national team players, and one potential national team player, all born outside the Republic of Croatia, for which we conducted qualitative semi-structured interviews in addition to information from the media (Zapata-Barrero & Yalaz, 2018).[1] We used biographical narrative interviews and problem-oriented interviews (Zapata-Barrero & Yalaz, 2018, pp. 14–15). We presented the obtained ethnographic material as the ethnography of the particular (Abu-Lughod, 1991). We also interviewed a long-time official of the Croatian Football Federation (CFF) who, for the past two decades, has participated in discussions with potential national team players from the diaspora about them playing for the Croatian national team. According to his wishes, he will remain anonymous in this paper.

The paper is structured so that we may provide a brief introduction to the development of professional football and the migration of footballers to other clubs and countries. We will then explain the process of acquiring citizenship with an example

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[1]   Since international footballers are public figures, we will use their names in this paper whenever they were used in our sources. The research has been conducted according to the ethical code of the Croatian Ethnological Society ("Etički kodeks", n.d.).

and show how that relates to the national team. We will also state the differences between civil and sports citizenship, focusing on formal options for playing for the national team. Following this discussion is a section on the forming of football teams, examples of migrations of national team members, and changes in international autonomous sports rules. The paper concludes by analyzing examples of footballers who had the right to choose a national team, emphasizing the personal motivation for each choice.

INTRODUCTION TO MIGRATIONS OF FOOTBALLERS

In 1863, representatives of eleven clubs and teams from London and the surrounding area founded the first national Football Association (FA). The basic goal of the association was to adopt and implement uniform rules according to which their sports game would take place. The founding of this association resulted in the strengthening of the organizational structure of football, an increase in the number of matches, and the first competition that took place from 1871 to 1872—the FA Challenge Cup (Mason, 1980, pp. 15–16). The migration of football players took place parallel with the development of organized football. After professional football was legalized in England in 1885 (i.e., footballers were legally paid to play) and the first competition, the Football League, was organized in 1888, the arrival of players from Scotland to English clubs became increasingly frequent. There were soon 58 Scottish professionals playing in English clubs, and in 1890, there were already 230 of them (Schulze-Marmeling, 2019, p. 33). In the twelve English professional clubs that played the Football League in 1891, a total of 448 professional players were registered, more than half of whom were from Scotland (Mason, 1980, p. 82). Clubs with sufficient financial resources created entire teams of players from outside England. For example, all players in the Liverpool FC 1892/93 team were foreigners—8 of them were from Scotland, as was the club's first coach (Schulze-Marmeling, 2019, p. 31). For a long time, until the 1980s, players from other British associations were the only "foreigners" who played in English clubs. After that, the arrival of players from other countries increased, and it became a common occurrence in the twenty-first century for some Premiership clubs (topflight of English professional football) to play with no Englishmen in their starting line-up.

In contrast, in most European and South American countries, it was the British who introduced the new game and participated in the establishment of the first football clubs (for Austria, see Schwind, 1994; for Germany, Eisenberg, 1994; for Spain, Eguizábal & Méndez, 1988; for South American countries, Campomar, 2015; and for a general overview, see Baker, 2015).

After the introduction of professionalism in the countries of continental Europe in the 1920s, transfers of players from clubs in one national association to clubs in another association increased significantly. During the twentieth century, national

football associations had different ways of regulating the registrations and the right of foreign nationals to play in domestic club competitions, with periods of more or less liberal approach to this issue (Iveta, 2022, p. 109). Players' transfers from a club in one national association to a club in another association led to the first occurrences of players changing their national teams. The twentieth century was marked by numerous migrations, both between European countries and immigration to European countries from other continents (cf. Black et al., 2010; King et al., 2010; Castles et al., 2014; Hollifield & Foley, 2022). Apart from players who came to the association of the receiving country with which they had no connection until then, national teams were also changed by immigrants and their descendants who played for the national team of their country of origin.

CITIZENSHIP AND NATIONAL TEAM

A national team in any sport, including football, represents a set of the best athletes in a particular sport with the citizenship of a particular country (with exceptions that will be mentioned later). Citizenship is the legal connection between an individual and a country, the connection that gives them the status of a citizen (Pezo, 2007, p. 267). Each country independently regulates and changes the conditions to be met for a certain natural person to become its citizen (Koska, 2012; Bauböck, 2019). We will present only the example of the Republic of Croatia and the Croatian Citizenship Act (2011) as a framework for obtaining citizenship. According to this Act, Croatian citizenship is obtained based on origin, birth in the territory of the Republic of Croatia, naturalization, and international treaties (Croatian Citizenship Act, 2011, Article 3). A foreign-born individual may obtain Croatian citizenship based on origin if they had one parent with Croatian citizenship at the time of birth, given that they have applied for registration as a Croatian citizen by the age of twenty-one (Croatian Citizenship Act, 2011, Article 5). A foreigner who has applied for admission to Croatian citizenship may acquire it by naturalization if they have reached the age of eighteen if they have been discharged from foreign citizenship, or if they have submitted proof that they will receive a discharge if they are admitted to Croatian citizenship, if they have lived in Croatia with a registered residence for eight years continuously until the application is submitted and have an approved status of a foreigner with permanent residence, if they speak the Croatian language and read Latin script, if they are familiar with Croatian culture and social structure, if they respect law and order, etc. A privileged group of persons who can obtain Croatian citizenship by naturalization without meeting the above conditions are expatriates and their descendants. According to this Act, expatriates are Croatians who emigrated from the territory of the former countries of whose territory the present Republic of Croatia was a part at

the time of emigration (Croatian Citizenship Act, 2011, Article 11).[2] Foreigners whose admission to Croatian citizenship would represent an interest in the Republic of Croatia and who can acquire Croatian citizenship by naturalization without having to comply with the assumptions for regular naturalization constitute a special category (Croatian Citizenship Act, 2011, Article 12).

A citizen has certain rights and obligations with respect to their country. One of their rights and obligations is to play for their country's national sports team. In football, as in most sports, appearances and all other issues related to the national team are resolved by the national association (see Sports Act, 2022, Article 47, Paragraph 5; for football, see Assembly of the Croatian Football Federation, 2021, Article 1, Paragraph 1). For example, Article 72 of the Statute of the Croatian Football Federation (HNS) establishes the basics of the organization of national teams. The Regulations on National Football Teams of the HNS shall regulate the detailed organization of national teams.[3] National teams play international matches against each other. The matches recognized by FIFA are those between two FIFA members in which each member plays with their own national team. If a FIFA member has allowed one of its leagues to choose a team that bears their country's name, such a match is also considered international (FIFA Statutes, 2010, Article 3, Paragraphs 1 and 4).

CITIZENSHIP AND SPORTS CITIZENSHIP: FORMAL OPTIONS TO PLAY FOR A NATIONAL FOOTBALL TEAM

Citizenship in the legal and political sense should be distinguished from the so-called sports citizenship, which an athlete must have to play for a particular country's national team. It differs from civil citizenship in the following:

1. It cannot be dual, i.e., a player cannot play for different national teams at the same time despite having two or more citizenships.

2. It does not always coincide with civil citizenship. A footballer can hold the citizenship of a FIFA member country and the sports citizenship of another country, also a FIFA member, and play for its national team. Examples include citizenship of the United Kingdom of Great Britain and Northern Ireland and sports citizenship of England, Scotland, Wales, Northern Ireland, or Gibraltar. For example, players from the Faroe Islands with Danish citizenship perform for the Faroe Islands team and those from Puerto Rico with US citizenship for the Puerto Rico team.

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2   In practice, this means that persons who have been established to be Croatians or whose ancestors moved from the territory of the present Republic of Croatia 150 years ago and who do not know the Croatian language also have Croatian citizenship.

3   Regulations on National Football Teams, HNS Registrations no. 20/98.

Apart from these contemporary examples, historical examples include the football associations of Austria, Hungary, and the Czech Republic, which had competence over territories within one country: the Austro-Hungarian Monarchy. However, all these associations were also members of FIFA and played international matches. This is because FIFA does not require its members to be sovereign states but also accepts associations responsible for organizing and supervising football in their own countries. At the same time, it is particularly emphasized that each British association is recognized as a separate member (FIFA Statutes, 2021, Article 11).[4]

In its statement of reasons in case CAS 2014/A/ 3776 Gibraltar FA v FIFA, the Court of Arbitration for Sport (CAS) gave the most comprehensive presentation and legal position regarding the options of membership of a particular association in FIFA (see Court of Arbitration for Sport, 2016).

In its basic principles, FIFA also regulates the right of footballers to play for a national team, referring to appearances in the teams of national football associations that are members of FIFA. Such an arrangement of football citizenship (previously mentioned sports citizenship specific for football), as well as the principle that only players with civil and football citizenship of a country can represent its national team, is also recognized by European Union (EU) law. EU law prohibits discrimination based on nationality and therefore requires that every EU citizen has the right to move and reside in the territory of any member state in sport, too, as well as be allowed the right to work. However, the European Commission's *White Paper on Sport* (2007), the most important EU document in the field of sport, allows for three exceptions concerning these general principles. The first is the most important for this paper: the right to choose an athlete for the national team based on nationality (i.e., citizenship; European Commission, 2007). This exception means that the ineligibility of citizens of other EU countries to play for a national team of any EU state does not constitute discrimination based on nationality.

FORMING OF NATIONAL FOOTBALL TEAMS, EXAMPLES OF MIGRATIONS OF NATIONAL TEAM MEMBERS, AND CHANGES IN INTERNATIONAL FOOTBALL RULES

Historically, the establishment of the English FA was followed by the forming of football associations in other countries of the United Kingdom of Great Britain and Ireland (now Northern Ireland). Shortly after, the idea arose of organizing matches

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4   The term "country" is defined in the FIFA Statutes as an independent state recognized by the international community. Given that there are several members who do not meet this criterion, we point to the provision of Article 11, Paragraph 6 of the Statutes, which stipulates that "an association in a region which has not yet gained independence may, with the authorisation of the member association in the country on which it is dependent, also apply for admission to FIFA," which is an echo of the former regulation of the status of football associations in colonies.

in which the best eleven players of each association would play (Butler, 1991, p. 19). The first match of the two associations' teams, also considered the first international match, was played in Glasgow in 1872 between the Scottish and English teams (Bell's Life, 1872). The fact that the limits determining the right to play for a particular national team were still fluid is proven by Lord Arthur Kinnaird playing for Scotland when he was also a member of the FA Committee and later a long-standing president of that association (Butler, 1991, pp. 17–19).[5]

During the second half of the nineteenth century, mass migrations occurred from European countries to North America and then to South America (King et al., 2010; Castles et al., 2014). These migrants conveyed the game of football not only as a way of spending leisure time but also as a professional sport. By the beginning of the twentieth century, football had spread to most European and South American countries, where national football associations were also established. Due to the increase in the number of international clubs and national team matches, there was a need for regulation at the international level (playing according to uniform rules, organizing competitions, cooperation, and mutual recognition). Representatives of the football associations (or sections) of France, Belgium, Switzerland, the Netherlands, Denmark, Sweden, and the Madrid Football Club on behalf of Spain founded FIFA at a convention held in Paris in 1904. The organization's statutes were adopted at that first congress, and the leaders were elected. Over the years, FIFA has asserted itself as a relevant organization with numerous members that manages international football. The right to play for national teams was not regulated before the Statute of 1929, which stipulated that each association determines the conditions necessary for playing for their national team (FIFA Statutes, 1929, Article 36).

In the second half of the 1920s and early 1930s, there was a noticeable trend of South American players arriving in European countries. They were national team members who switched the citizenship of their country of birth for the citizenship of their parents' country of origin and continued to play for it (for example, Argentinian players of Italian origin went to Italian clubs and took Italian citizenship). The most famous is the Argentinian *oriunda*[6] trio of Juventus—Renato Cesarini, Raimundo Orsi, and Luis Monti. All three played for the Argentinian national team (Cesarini and Orsi won the silver medal at the 1928 Olympic Games, and Monti played in the 1930 World Cup final). After joining Juventus, they were granted Italian citizenship, and Orsi and Monti, along with two other naturalized Argentines, Enrique Guaito and Attilio Demaría, Roma players, won the World Cup in 1934 with Italy (Schönau, 2008; Barnade & Iglesias, 2014).

However, seeing that this way results in manipulation and "import" of foreign players into national teams, FIFA incorporated the provision that players who are

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5   Kinnaird holds the record for appearances in the FA Cup finals, appearing in nine finals with different clubs.
6   An expression that denotes a returning immigrant, especially in sport, in Italian and Spanish. In Croatia, the term "diaspora player" is commonly used.

capped for the national team should be citizens of the country they represent into their Statute of 1933 (this was a rule until then, but it was not in the Statute). Furthermore, if a player appeared for a national team, he was not allowed to play for the national team of a new association until he had been a resident of the association for three years (FIFA Statutes, 1933, Article 21, Rules). In practice, however, the three-year rule was not respected. In 1935, Orsi and Guaita left Italy, and in 1937, they were again capped for the Argentinian national team (Barnade & Iglesias, 2014, p. 37).

After World War II and the establishment of communist regimes in Eastern Europe, there was a wave of refugee migration (including football players and national team members) toward Western European countries. In 1945, László (Ladislao) Kubala from Hungary, whose parents were of Slovak origin, migrated to Czechoslovakia and played for their national team. He then returned to Hungary and played for their national team. In 1949, he defected to Italy and founded the Hungaria club with a group of compatriots with whom he played on the European tour. He settled in Spain, where he joined the Barcelona club. As their player, he also played for his third national team, Spain (Pereira, 2010, p. 60). Kubala's registration for the Spanish club sparked a huge dispute between the Hungarian and Spanish football associations because the Hungarian federation suspended him for unauthorized departure. The Spanish federation replied that it was a suspension for political reasons because Kubala was an anti-communist. The Hungarian federation was joined by other associations from the Eastern Bloc and asked to suspend the "fascist" Spanish Football Federation because it did not respect the FIFA Statutes in part, stating that one member must respect the suspension imposed by another member. FIFA refused to interfere, and in 1953, Kubala was allowed to play for Spain in official matches as well (Lanfranchi et al., 2004, pp. 89–93; Dietschy, 2006, pp. 37–38).

After the suppression of the Hungarian uprising in 1956, a large number of footballers, including the majority of players of Honvéd, the best European club at the time and the backbone of the Hungarian national team (referred to as Light Cavalry in Croatia and former Yugoslavia), which was the first to beat England on home soil, and was the finalist of the 1954 World Cup, fled from Hungary to the West. They included Ferenc Puskás, considered the best European footballer at the time. He joined Real Madrid and played four matches for the Spanish national team from 1961 to 1962 (Pereira, 2010, p. 60). Another naturalized Spaniard, Alfredo Di Stéfano, played for Real Madrid and Spain at the time. The Argentine of Italian origin Di Stéfano originally played for the Argentinian team. When he moved to Millonarios from Bogotá, he switched his national team and played for Colombia. Finally, four years after he arrived in Madrid, he also played for the Spanish national team and played 31 matches from 1957 to 1961 (Ibid.). Thus, at the same time, three players who were not born in Spain played for the national team while having no connection with Spain before they started playing for Spanish clubs.

These examples and the remarks of many football associations prompted FIFA to introduce a rule in the 1960s that after a player has played for one country's national

team, he can no longer play for another country unless it is a newly recognized country. This provision was particularly applicable when new countries were formed in the early 1990s, after the dissolution of Yugoslavia, the Soviet Union, and Czechoslovakia, and national team members of former states were allowed to play for the national team of the newly created country whose citizenship they took. The breakdowns of such countries and the change of state borders have prompted numerous co-ethnic migrations of people who returned to their countries of origin (Rajković Iveta, 2012; ethnic return Tsuda, 2009), ancestral migrations and migration due to (King, 2000) capital changes in civil and sports citizenships. However, citizenship was still the only condition for playing for the team.

Contemporary global migrations are characterized by acceleration and short duration (Cohen, 1995; Castles et al., 2014), which also reflects on international migrations of footballers, whether they are changing football clubs or playing for the national team. Of course, numerous footballers are also descendants of different generations of migrants whose parents connect the society of origin and the receiving society through multiple transnational processes (Glick-Schiller et al., 1992; Wessendorf, 2007) and who are connected to their country/homeland of origin emotionally and in terms of identity (Komar, 2015).

Until 2003, the right to be capped internationally was regulated in the FIFA Regulations on the Implementation of the Statute by only one provision, which stipulated that any player who is a naturalized citizen of a country in accordance with its regulations may be capped for that country's national team. If he had already played for a member state's national team, he could no longer play for another team, regardless of citizenship. There was an exception if the citizenship was changed without the player's will.[7] In 2003, a rule was added to these provisions—that a player who had already played for the national team of a country whose citizenship he holds may still claim the right to play for the national team of another country but, provided that he was never capped for the country's A team (FIFA Statutes, 2002), that at the time when he possibly performed for the national team (except for "A") of the previous association he already had the nationality of the country he intends to play for and that he did so before his twenty-first birthday (FIFA Statutes, 2003).

However, in 2004, an attempt by Qatar to get three Brazilian football players to take citizenship and perform for the country's national team came into focus. One of the Brazilians, then a German club's footballer, was allegedly offered USD 1.2 million to agree to take Qatari citizenship (Bašić, 2015, p. 35). The player explained that even if he had agreed, it would not have been for the money but for the option of playing for the national team. He was not invited to Brazil's national team because of the great competition, and Germany, where he lived and played, also showed no interest in inviting him. However, he met the requirements for regular acquisition of citizenship (Oonk & Van Campenhaut, 2021). The president of FIFA at the time

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7   FIFA Regulations on the Application of the Statutes of 2002, Article 18.

insisted that in the event of an appearance for a national team, players should have a clear connection with the country for which they want to play when it is different from the country of their birth. He also expressed concern that there would be thirty-two national teams at the 2014 and 2018 World Cups, but they would be full of Brazilians (Oonk & Van Campenhaut, 2021).

In this invitation example, we see the privilege of individuals, i.e., top football players, who are offered citizenship of a country where they do not need to live, in addition to monetary rewards and privileges, and the issue of integration is not raised. Privileged acquisition of citizenship is also found in other elite immigrants, most often extremely wealthy individuals, to enable them to invest economically and buy real estate in certain European countries (Džankić, 2019).

After a period of consideration, in the Rulebook on the Application of the Statutes of 2008, FIFA elaborated on the right to play for a national team and the right to change associations. The rule that any player who participated in a match in an official competition for one association cannot play an international match for a national team of another association remains. If a player has the right to represent more than one association based on citizenship, he could only play an international match for one of those associations if he met at least one of the following conditions: he was born in the territory of that association, the biological mother or father or grandmother or grandfather were born in the territory of that association,[8] and the player had continuously lived in the territory of that association for at least two years.

If a player who did not have multiple citizenships and who did not play for any national team acquires a new citizenship to play for the national team of a country whose citizenship he has acquired, he should also meet one of the above conditions, with the continuous stay in the territory of the new association extended to five years after the age of eighteen (FIFA Statutes, 2008, Articles 15–18). Apart from citizenship, these provisions established a clear link between a player and the country for whose national team he plays. Even though the player played an international match (but not with the A team), the rules on changing associations remained the same as those adopted in 2003.

A major change in the rules on the right to play for the national team took place after adopting the Rulebook on the Application of the FIFA Statute of 2020. Four situations relating to the right to play for the national team should be distinguished, and they are related to players' multiple civil citizenships:

1. A player who has the right to play for multiple national teams based on citizenship may play for one of these associations if he is born on its territory or one

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8   For example, Daniel Rubén Bilos, an Argentinian footballer of Croatian origin, could not play for the Croatian national team despite mutual interest and possession of Croatian citizenship because his closest ancestor born in the territory of today's Croatia was his great-grandmother. Author's interview with R. Bilos in the spring of 2006.

of his parents or one of his grandparents was born there or lived in the territory under the jurisdiction of that association continuously for at least five years (until 2020, two years were prescribed).

2. A player who has not played for any national team and has acquired a new nationality shall be given the opportunity to play for the country whose citizenship he obtained if he was born in the territory of the association of that country or if his parents or one of his grandparents were born there or if he lives in the territory of that association for at least three years if he started living in that area before the age of ten; five years if he started living in that area between the age of ten and eighteen or after the age of eighteen.

3. A player who was already capped for a national team may play for a new national team (the country whose citizenship he holds) even if he was capped for the A team of the old association (a significant change), provided that he has not reached the age of twenty-one at the time of his last cap, that he has was capped less than three times, that more than three years have elapsed since his last cap, and that he already held the citizenship of the country of the new association at the time of his last cap. If the player played for one of the youth teams (i.e., not the A team), he does not need to have held the citizenship of the country of the new association at that time (but only if he was not older than twenty-one at the time when he played for the youth team), but he needed to meet some of the conditions listed under point 1 or 2. In the event that a player has appeared for the national team of the old association (apart from the A team) and already holds the citizenship of the country of the new association at that time, no additional conditions need to be met (FIFA Statutes, 2021, Article 6 and Article 9, Paragraph 2, Points a–c).

These changes were made so that a player who has already played for a national team whose association clearly no longer counts on him as a member can continue his career in another association's national team in a country whose citizenship he holds as long as he also meets other criteria. It often happened that a player would play one or two matches for a national team and would no longer be called up. At the same time, he would not be able to play for another association's national team in which the competition is not as strong because he was prevented by those few caps for the old national team. Also, according to the new system, a player who played for a youth team is no longer prevented from playing for a new national team if he did not hold the citizenship of the new association at the time of playing for the previous national team. This allowed a player who did not have a new citizenship before the age of twenty-one to be capped for the A team of the new association. For example, if Eduardo Da Silva, a Brazilian footballer who came to Croatia as a minor and played for GNK Dinamo, had played for any Brazilian national team during his youth career, he would not have been eligible to play for the Croatian national

team because he did not hold Croatian citizenship at the time he played for Brazil. Moreover, this player spent almost his entire football development in Croatia. The new system achieved a balance between a liberal approach and, consequently, a large fluctuation of players in different national teams and a very rigid approach that effectively prevented the transition to another national team.[9]

4. A special case occurs when a player has appeared for the national team of an association and wants to appear for an association that became a member of FIFA after that. In this case, a player may appear for the new association without meeting the above conditions if he has no longer played for the old association after the new association had become a member of FIFA. He already held the citizenship of the new association at the time of his national team appearance or obtained the citizenship of the country of the new association when this became effectively possible after the recognition of that country by the majority of the members of the United Nations (FIFA Statutes, 2021, Article 9, Paragraph 2, Point d).

An example of this case is Kosovo and its national team. Following the international recognition of Kosovo, its citizens, who had already played for another national team, were eligible to play for the Kosovo team. This particularly compromised Switzerland's national team because several of its important players were from Kosovo. However, only one player decided to play for Kosovo.

The Rulebook also regulates the situation when a player holds no citizenship (stateless person) or, due to the laws of his country of residence, may never obtain citizenship of that country. In this case, a player may be eligible to play for the national team of his country of residence if he has lived in its territory for at least five years and can prove that the move to that country was not for reasons related to its national team (FIFA Statutes, 2021, Article 8). This can be applied to forced migrants and refugees who have received international protection but not citizenship in the host country.

ANALYSIS OF EXAMPLES OF THE CHOICE OF FOOTBALLERS WHO HAD THE RIGHT TO CHOOSE A NATIONAL TEAM

After presenting the changes in formal options to play for a national football team, in this part of the paper, we will analyze examples of the application of these options, i.e., choosing to appear for different national teams of countries other than the footballer's country of birth. By analyzing the migration background of a national team

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9   More about sports citizenship and the right to play for the national team (situation in 2016) see: Medić, 2017.

player and the choice of the national team for which they choose to play, we have reached three basic groups/cases:

1. A footballer migrated to another country to play football in a club and became a naturalized citizen. Examples include Eduardo Da Silva and Jorge Sammir Cruz Campos, who came to Croatia from Brazil and played for the Croatian national team after acquiring Croatian citizenship. Reverse examples of Croatian citizens who went to play in foreign clubs and then played for the national teams of those countries are Josip Weber and Branko Strupar, who played for Belgium, Ivica Vastić for Austria, and Filip Ozobić for Azerbaijan.

2. A person migrates for reasons unrelated to football, most often for economic or political reasons[10] (often in the form of forced refugee migrations). Future national team members usually came to a new country as children or in their early youth and started playing football there. An example is a number of Swiss national team members originating from Turkey or Kosovo (e.g., Xerdan Shaqiri).

3. France, the Netherlands, and Belgium are examples of countries whose national teams include footballers from their former colonies, with some also born in the country for which they play.

An additional distinction was observed in footballers (immigrant descendants) who were born in a country different from the country of their parents' birth/origin. In practice, these footballers play:

4. For their country of birth, e.g., Swiss players of Turkish origin Kubilay Türkyilmaz and the brothers Murat and Hakan Yakin (Murat was also the Swiss national team coach) and Mario Gavranović and Josip Drmić, who are of Croatian origin, as well as the Austrian David Alaba, the son of a Filipino and a Nigerian. Marc Viduka and Josip Skoko, Australians of Croatian origin who played for the Croatian clubs Dinamo and Hajduk, respectively, decided to play for Australia, where they were born. The world's most famous example is probably Zlatan Ibrahimović, the son of a Bosniak and a Croatian who migrated from Bosnia and Herzegovina to Sweden, where he was born. Despite the call and efforts of the HNS to play for the Croatian national team, he decided to play for Sweden;

5. For their parents' (or grandparents') country of origin, e.g., (in Croatia) Josip Šimunić and Anthony Šerić/Seric (born in Australia). Josip Stanišić, who was born in Germany and played for the German U-19 national team, and Luka Sučić, who was born in Austria, both played for the Croatian A team. Marco Pašalić, born in Germany, chose the Croatian national team since the U-17 selection and plays for the Croatian U-21 team. The case of Jakov Suver, former

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10   For the causes of migration see Brettell & Hollifield, 2000.

captain of the German U-19 team, is also interesting—he decided to change associations and play for the Croatian national team (FIFA, 2021b).

The relationship of immigrant children with their parents' country of origin, an imaginary homeland in which they never lived, is also interesting when it comes to brothers Niko and Robert Kovač, who were born in Germany, and Ivan Rakitić (born in Switzerland), who chose to play for the Croatian national team. The choice of a national team to play for is based on a number of factors. Early recognition of the footballers' quality, lobbying of national associations, and the responsibility of negotiators for the future career of the footballers are certainly crucial here, which is evident from the testimony of our source, who held a high position at the Croatian Football Federation and went to Switzerland several times to talk with Ivan Rakitić and his family in the procedure for changing his football citizenship:

> The then president of the HNS, Vlatko Marković, and I told them that the HNS was very interested in Ivan playing for Croatia, that a generation of players was emerging that could do great things, and that he would fit in perfectly. Of course, we also emphasized his Croatian origin, and we were aware of their patriotic feelings. They were very glad that we showed interest. Then, the Swiss Football Association became involved; their coach also came for an interview. However, both the parents and the player were determined that Ivan would play for Croatia. You know, it is not an easy decision after all. The player was born there, went to school there, had friends, and still played for a Swiss club at the time. On the other hand, the negotiator also has a great responsibility. He can tell the player that he would play for the national team, but what if the coach changes, if he will no longer have a vision of the game with that player? And, in the meantime, you persuaded the player to change the national team and thus 'blocked' him from playing for any national team. Fortunately, everything ended well in this case, and Ivan achieved great success with the Croatian national team. (conversation conducted on 14 September 2023)

The Boateng brothers, one of whom decided to play for his country of birth and the other for the country of origin, are a combination of examples under d and e. Their father came from Ghana to Germany to study, continued living there, and had sons—Kevin Prince and Jerome. They both became good footballers and played for all German national teams during their youth careers. However, after Kevin Prince concluded that he would not be invited to the German A team, he decided to play for the Ghanaian national team, a country where he had never been before. Given that Jerome Boateng was a member of the German national team, two brothers participated in the 2010 World Cup as members of two different national teams (Bašić, 2015, pp. 28–29). This example shows how opportune the choice of a national team can be for a player and how these decisions are subjective and situational career

strategies in which personal and/or family migration backgrounds and contexts are used as resources.

Other examples of brothers playing for different national teams include the Xhaka brothers, where Granit plays for Switzerland and Taulant for Albania. The father of the Thiago and Rafael (Rafinha) Alcântara brothers was the world champion with the national team of Brazil in 1994 and played in clubs in Italy (where Thiago was born) and Spain (see "Thiago Alcantara", n.d.). Thiago played for *Barcelona* and the Spanish national team, while Rafinha also played for Barcelona and the Spanish youth teams. They changed associations during their youth career and played for Brazil's U-21 and A teams. The Alcântara brothers are an example of naturalization after migration motivated by football (their father moved to play football). We will also mention the example of the twin brothers Matthias and Florentin Pogba, who were born in Guinea (they grew up in France and started playing football in Spain) and play for the Guinea national team. In contrast, their more famous brother Paul was born in France and plays for its national team. Unlike Paul, a standard French international player and a world champion, who played for the great European clubs Juventus and Manchester United, the older brothers played in smaller clubs in various leagues, so obviously, the football quality conditioned the national team for which they would play.

ANALYSIS OF PERSONAL MOTIVES FOR CHOOSING A NATIONAL TEAM ON THE EXAMPLE OF CROATIAN NATIONAL TEAM PLAYERS

The above categorization and examples also show the basic motives that were decisive when a footballer chose the national team for which he would play. Since an international analysis would exceed the framework of one paper, we will provide the data for Croatian national team members from the diaspora, which shows that we can classify them into emotional and patriotic or professional and sports-based motives.

Emotional and patriotic motives are related to a strong national identity of the immigrant parents' country of origin, as is evident in the statement of Marco Pašalić (Germany) after the invitation to the young Croatian national team: "I cannot describe the amount of pride with which I will play for the Croatian national team because I was raised from a young age with Croatia as my homeland …" (S. A., 2021).

The same goes for Luka Sučić: "The Austrians were very insistent, they pressured me, they wanted me to play for them, but I was always clear about that: Croatia is my only homeland, and Austrians stood no chance" (Hrvatski nogometni savez (CFF), 2021).

After Josip Stanišić, from a *Gastarbeiter* family in Germany, was first invited to the Croatian national team, a journalist visited his grandfather, who also lived and worked in Germany for years and was an amateur football referee. On the occasion of his grandson's invitation to the national team, the grandfather held a celebration,

bought a new Croatian flag, and gave the following statement regarding the grand-son's decision:

> I cannot say that I was a hundred percent certain that he would choose Croatia. I had hoped for it intimately and wanted this, but I did not pressure him, and neither did anyone else in the family […] he knew what to do and what to decide. […] Admittedly, we may have contributed to this because we have always proudly pointed out where we come from. We regularly watched the matches of the Croatian national team dressed in our kits at our Croatian club in Munich … (Patković, 2021).

Josip Šimunić is also one of the former Croatian national team members in this group. He was born in Australia as a child of Croatian immigrants.[11] As a member of the Melbourne Knights club (former Croatia Melbourne), which gathered mostly Australian Croatians, he won the Australian Championship in 1996 and garnered the interest of the HNS leadership. After speaking with advisor Ante Pavlović, who offered him the opportunity to play for the Croatian national team, Šimunić agreed and only then requested and obtained Croatian citizenship. When asked if there were any offers from the Australian Football Federation, Šimunić replied: "I was invited to the camps, but when I was supposed to get an invitation to play in one of the Australian national teams, I refused. I wanted to play for Croatia." He mentioned his reason for the decision: "I watched Croatia at the European Championship, I supported them and thought how nice it would be to play for that team. I feel like a Croatian, and I wanted to play only for the Croatian national team."

These examples show that choosing a national team, as well as supporting a particular national team, can be an indicator of the level of national identity of the country of origin, transnational processes, and a failure to identify with and integrate into the society of the receiving country while integrating into their own ethnic community in the receiving country.

Professional and sport-based motives prevail among footballers who choose a national team for which they believe they can compete in terms of football. One national team can have enough quality players, so a footballer cannot assert himself and get a place in the team because the competition is too strong. In this case, the footballer chooses a team for which he has the opportunity to play, whether the football association offers it or he believes it will happen. Such examples are naturalized Brazilians Da Silva and Sammir in the Croatian national team and Croatians Weber and Strupar in the Belgian national team. These players usually want to enrich their professional football career with appearances for the national team, preferably at the World Cup.

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11   From the interview with Josip Šimunić, November 24, 2021. The continuation of the text is based on that conversation.

Sports motives may sometimes be mixed with business and financial motives. For example, twenty-two Brazilians played for other teams at the 2016 Futsal World Cup. Seven Brazilians thus played for Italy, six for Azerbaijan (Əhlimanoĝlu, 2016), and several for Kazakhstan (FIFA, 2021a). On the one hand, these examples show choice and strategy (instrumental aspects) and dynamics of identity when analyzing identity politics (Eriksen, 2001, p. 47), which is conceptualized as an instrumentality of belonging (Ibid.).

CONCLUSION

Contemporary societies, as well as national football teams, are the result of numerous historical and contemporary migration processes. Migrants, professional footballers, and amateurs have spread this game around the world. The expansion and development of professional football also required the harmonization of international rules, and numerous migrations resulted in the need to regulate sports citizenship, or, in the researched example, football citizenship, and to further regulate formal options of representing a national team. The analysis of the use of these options and individual reasons for choosing to play for the national team of a country other than the footballer's country of birth shows that such cases most often occur in countries with a large influx of immigrants, which had colonies, which have a large diaspora, whose football leagues are extremely strong, and which have much competition among footballers. The results show multiple practices, and the choice of parents' or grandparents' country of origin is particularly prominent, which also shows the absence of an identification dimension in the integration of immigrants and their descendants in the receiving society, as well as that identity from the country of origin is passed through and kept in the family and ethnic community. Some national team members play in strong international clubs in one country and for the national team of another where they, and sometimes even their parents, have never lived. The motivation for choosing where to play is emotional and patriotic and/or professional and sport-based, which is especially evident with brothers who are footballers and who, due to the difference in their level of quality, play for national teams of different countries. Furthermore, the research points to the option of obtaining privileged citizenship, opportune citizenship, contributes to the studies of highly specialized, privileged, and elite citizens, questionably of migrants, since they only occasionally physically come to the state of their citizenship (for short preparations of the national team). During the research, potential migration to another country was observed after invitations to play for the national team, which expands the previous typologies of migrants, i.e., virtual migrants and citizens, who do not need to live in a country but contribute to its victories and promotion internationally with their sports skills. Ultimately, no one questions their integration, whether they speak the language or are familiar with the culture, law, and order of the country for which they play, which opens the need for new research and challenging previous theories on integration.

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POVZETEK

MIGRACIJE, DRŽAVLJANSTVA TER PRAVICA IN IZBIRA IGRANJA ZA NACIONALNO NOGOMETNO REPREZENTANCO S POUDARKOM NA HRVAŠKI REPREZENTANCI
Vladimir Iveta, Marijeta Rajković Iveta

Na prebivalstvo evropskih držav so vplivale številne migracije, kar se odraža tudi v sestavi nogometnih reprezentanc. Avtorja v uvodu prikažeta razvoj profesionalnega nogometa in pojav mednarodnih migracij nogometašev, nato pa pojasnita pogoje za njihovo pridobivanje državljanstva. Da bi nekdo postal reprezentant, ni dovolj, da ima državljanstvo države, za katero igra, temveč mora imeti tudi t. i. športno državljanstvo. Po prikazu formalnih možnosti nastopa za reprezentanco avtorja analizirata odnos med temi državljanstvi ter pravico do izbire reprezentance, za katero bo nekdo igral, in sicer v kontekstu migracijskih procesov, od prvih migracij nogometašev v nogometnih klubih (konec 19. stoletja) do oblikovanja nogometnih reprezentanc s poudarkom na suverenosti. Na primerih reprezentantov z migrantskim ozadjem pokažeta na spremembe mednarodnih pravil Mednarodne nogometne zveze (FIFA). Besedilo temelji na različnih virih: pravnih aktih nacionalnih in mednarodnih nogometnih organizacij, državnih predpisih, objavljeni literaturi, analizi medijskega diskurza ter kvalitativnimi polstrukturiranimi intervjuji s hrvaškimi nogometnimi reprezentanti iz diaspore.

Cilj besedila je na konkretnih primerih in izkušnjah nogometnih reprezentantov proučiti njihove razloge in motive za igranje za reprezentanco države, ki ni njihova država izvora. Analiza gradiva kaže, da se takšni primeri najpogosteje dogajajo v državah, ki imajo visok priliv migrantov, ki so imele kolonije, ki imajo številčno diasporo ali močne nogometne lige. Nogometaši se pri tem odločajo različno, najpogosteje pa si izberejo reprezentanco države izvora njihovih staršev ali starih staršev, kar kaže na močno identifikacijsko dimenzijo integracije migrantov in njihovih potomcev ter na močno subjektivizacijo nacionalne identitete, ki se prenaša z družino in etnično skupnostjo v družbi sprejema. Rezultati raziskave kažejo, da so motivi za izbiro emocionalno-nacionalne in/ali športno-profesionalne narave, pri čemer so v nekaterih primerih slednji združeni še s poslovno-finančnimi motivi.

Raziskava prispeva k študijam pridobivanja privilegiranega in oportunega državljanstva ter k študijam visoko specializiranih, privilegiranih in elitnih migrantov. Pokazal se je tudi potencial migracij na poziv v drugo državo, da bi tam nogometaši igrali za reprezentanco, s čimer se širijo dosedanje tipologije migrantov, ki živijo izven določene države, a s svojimi športnimi spretnostmi prispevajo k njeni promociji v mednarodnem merilu. Rezultati spodbujajo preizpraševanje dosedanjih politik državljanstva in teorij o integraciji, zlasti njenih pravnih, političnih in identifikacijskih dimenzij v navezavi na ‚industrijo' državljanstva in nacionalno identiteto, saj države sprejema, za katere reprezentanti nastopajo, ne postavljajo vprašanj, povezanih z integracijo, npr. ali oseba pozna jezik, kulturo, pravni red ipd.

ORIS SLOVARJEV IN PRIROČNIKOV ZA UČENJE ANGLEŠČINE SLOVENSKIH IZSELJENCEV V ZDA V OBDOBJU 1895–1919

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IZVLEČEK
Oris slovarjev in priročnikov za učenje angleščine slovenskih izseljencev v ZDA v obdobju 1895–1919
V članku je na kratko predstavljena zgodovina slovenskega priseljevanja v ZDA. Sledi analiza šestih slovarjev in priročnikov, objavljenih med letoma 1895 in 1919, ki so bili slovenskim izseljencem v ZDA v pomoč pri učenju in razumevanju angleščine ter pri prilagajanju novemu kulturnemu okolju. Avtorice v raziskavi ugotavljajo, katere vrste informacij so bile izseljencem na voljo v preučevanih slovarjih in priročnikih (npr. razlaga izgovora angleških besed, razlaga angleške slovnice, koristni pogosti komunikacijski obrazci, navodila za naturalizacijo, pojasnila o poimenovanju in vrednosti ameriških kovancev in bankovcev, različni oglasi).
KLJUČNE BESEDE: slovenski izseljenci v ZDA, slovarji, priročniki, učenje angleščine, prilagajanje novemu kulturnemu okolju

ABSTRACT
English Dictionaries and Reference Books for Slovenian Immigrants to the United States, 1895–1919
This article first presents a historical sketch of Slovenian immigration to the United States. Then, it analyzes six dictionaries and reference books (1895–1919) intended for this immigrant population. These books played an important role in learning English and acculturating to the United States. The study investigates what types of information were available to Slovenian immigrants in these books. For example, explanations of English pronunciation and grammar, useful everyday phrases, instructions for naturalization, explanations of names and values of US coins and bills, and various advertisements.
KEY WORDS: Slovenian immigrants in the United States, dictionaries, reference books, English language learning, acculturation

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UVOD

Konec 19. in v začetku 20. stoletja so se zaradi velikega števila migrantov iz Evrope v Združene države Amerike oblikovale številne evropske etnične skupine, ki so v večji ali manjši meri vplivale na svojo novo domovino; ta vpliv še do danes ni popolnoma izzvenel. Med priseljenci so bili tudi Slovenci, posebno veliko jih je prišlo v ZDA od leta 1905 do 1. svetovne vojne. Naseljevali so se predvsem na srednjem zahodu in severovzhodu ZDA, največja koncentracija Slovencev pa je bila v Clevelandu v Ohiu, ki ima za ljudi s slovenskimi koreninami še vedno poseben pomen. Čeprav so številni priseljenci v ZDA izhajali iz revnejših družin, so bili med njimi že pred prvo svetovno vojno tudi mali podjetniki, zlasti obrtniki (Klemenčič, 1995, str. 108–131). Glede na to, da so se ljudje izseljevali zlasti zaradi slabih življenjskih pogojev doma, so izseljenci prihajali predvsem iz revnejših predelov Avstro-Ogrske, vendar pa so bili med slovenskimi izseljenci tudi rudarji, ki niso delali le na slovenskem etničnem ozemlju, ampak tudi izven njega (npr. v zgornještajerskih rudnikih). Natančnih podatkov o številu Slovencev, ki so prišli v ZDA v obdobju glavnih migracijskih tokov, praktično ni mogoče dobiti, saj so se pogosto izdajali za Avstrijce, Italijane, Hrvate, Slovane ali Slavonce, to pa je bilo odvisno od časa prihoda in od evropske države, iz katere je odplula njihova ladja.

RAZISKAVA

Namen raziskave je identificirati in podrobno preučiti različne angleško-slovenske vire (slovarje, priročnike), ki so izšli od konca 19. stoletja do leta 1919, torej v obdobju, ko je v ZDA prišlo največ slovenskih priseljencev. Ti viri so imeli pomembno vlogo pri njihovem prilagajanju novemu kulturnemu okolju in učenju angleščine. V okviru projekta smo obiskali različne kraje v ZDA in Sloveniji ter preučevali časopise in arhive ter genealoško in drugo gradivo s podatki o slovarjih in priročnikih ter o njihovih avtorjih, srečali in pogovarjali pa smo se tudi s potomci slovenskih priseljencev, ki so nam postregli z dragocenimi podatki. Za slovenske priseljence je veljalo, da so se angleško naučili relativno hitro in z lahkoto (Gobetz, 2014), zato smo želeli ugotoviti, v kolikšni meri so slovarji in priročniki prispevali k usvajanju in razumevanju angleščine in posledično tudi k razvoju in razcvetu skupnosti ameriških Slovencev v prvih desetletjih 20. stoletja. V prispevku najprej na kratko opišemo zgodovino slovenskega priseljevanja v ZDA, nato pa se posvetimo analizi šestih slovarjev in priročnikov, objavljenih med letoma 1895 in 1919.

UMEŠČANJE NASTANKA SLOVARJEV IN PRIROČNIKOV V ZGODOVINSKI KONTEKST

Slovarji niso samo priročniki, ampak tudi kulturno specifični artefakti. Pri interpretaciji podatkov, vključenih v slovarje, je treba poznati čas nastanka in ciljno publiko. To velja tudi za slovarje in druge priročnike, ki so bili namenjeni slovenskim izseljencem v času najmnožičnejših preseljevanj, izhajali pa so v manjši meri na območju sedanje Slovenije, v večji meri pa v ZDA. V nadaljevanju sledi kratek kronološki pregled izseljevanja v ZDA s poudarkom na obdobju od konca 19. do sredine 20. stoletja.

Izseljevanje Slovencev v ZDA

Zgodnje izseljevanje

Do vključno prve polovice 19. stoletja so se Slovenci – z redkimi izjemami (npr. pustolovci in misijonarji) – zaradi omejenih možnosti zelo redko izseljevali. Že leta 1680 je na področju sedanjih ZDA nastalo nekaj slovenskih naselij, ki so bila povezana z dejavnostmi katoliških misijonarjev (Gobetz, 2014). V obdobju, ki je sledilo protireformaciji (od sredine 16. do sredine 17. stoletja), so vse do zgodnjih 80. let 18. stoletja protestante preganjali in izganjali. Leta 1730 se je nekaj protestantov z območja današnje Slovenije naselilo na območje današnje zvezne države Georgia (Runyon & Davis, 2016; Žugel, 1987). Sporadično izseljevanje se je nadaljevalo celotno 18. stoletje, slovenske priimke najdemo celo med vojaki kontinentalne vojske Georga Washingtona leta 1775 (Prisland, 1950).

V 19. stoletju je v Severni Ameriki deloval slovenski misijonar Friderik Baraga (1797–1868), katerega delo *Geschichte, Charakter, Sitten und Gebräuche der nord-amerikanischen Indier*, ki je izšlo tudi v slovenskem prevodu z naslovom *Popis navad in sadershanja Indijanov Polnozhne Amerike*, opisuje življenje in značilnosti severnoameriških staroselcev. Ljudje so knjigo prebirali, v njej so našli različne informacije o ZDA in v njih se je vzbudila radovednost o Ameriki (Mazi-Leskovar, 2003; Dolinar & Slavec Gradišnik, 2013). Čeprav v naši raziskavi nismo preučevali Barage in njegovih del, gre brez dvoma za zanimivo osebo z vidika slovaropisja, saj je verjetno prvi slovaropisec slovenskih korenin v ZDA. Poleg slovnice očipvejskega jezika (*A theoretical and practical Grammar of the Otchipwe language for the use of Missionaries and other Persons Living Among the Indians*; Detroit, 1850) je izdal tudi slovar očipvejskega jezika (*A Dictionary of the Otchipwe Language explained in English […] for the use of Missionaries and other Persons living among of the above mentioned Indians* (Baraga, 1853), velja pa tudi za utemeljitelja knjižnega jezika indijanskih plemen Očipve in Otava (Dolinar & Slavec Gradišnik, 2013; več o Baragi gl. tudi Marković, 2017). Tudi sicer so slovenski misijonarji odigrali pomembno vlogo pri izseljevanju Slovencev v ZDA, saj so v svojih zapisih opisovali rodovitnost ameriških prostranstev in možnosti za naseljevanje kmetov, prav tako pa so se v časopisih in v pismih

svojcem s pozitivnimi izkušnjami oglašali slovenski izseljenci, ki so si v ZDA ustvarili novo življenje (Kalc et al., 2020, str. 84).[1] Med misijonarji, ki so spodbujali izseljevanje s slovenskega etničnega ozemlja konec 19. stoletja, velja omeniti Franca Pirca in Jožefa Buha, ki sta skupaj s svojimi učenci povezovala misijonarsko obdobje zgodovine Slovencev v ZDA s kasnejšim množičnim priseljevanjem ter ustvarjanjem slovenskih naselbin (Klemenčič, 2017, str. 687–704; Klemenčič & Šeruga, 2019, str. 167–173). Poudariti velja, da je katoliška cerkev pomembno vplivala tudi na nastanek slovenskih etničnih župnij, na časnikarsko, tiskarsko in izdajateljsko dejavnost ter na publicistično in literarno dejavnost slovenskih priseljencev v ZDA (več o tem gl. Friš, 1995, str. 85–179).

Izseljevanje Slovencev se je začelo krepiti kot del množičnih globalnih migracij. Industrijska revolucija je v Evropi sprožila notranje migracije, ki so se kazale predvsem v obliki nenehnega priseljevanja kmečkih prebivalcev s podeželja v mesta in nastajajoče industrijske centre (Drnovšek, 1994). Slovenci so se izseljevali tudi v industrijske centre habsburške monarhije, kot so bili Gradec, Dunaj, pa tudi Budimpešta (Klemenčič, 1979), povečalo se je tudi število izseljencev iz Evrope v ZDA. Ker je parna energija postala komercialno donosnejša, se je po letu 1764 razvil železniški in pomorski promet, zaradi česar je svet postal dostopnejši in privlačnejši za vse, ki so se počutili utesnjeni v čedalje gosteje naseljeni Evropi (Drnovšek, 1994). V času največjega izseljevanja Slovencev je bil čezoceanski potniški promet že dobro utečena »migracijska industrija«, s pomočjo katere so na ameriški trg delovne sile prihajali evropski izseljenci, med njimi tudi Slovenci. Poudariti je treba, da je v tem času hitro razvijajoče se industrije v ZDA močno primanjkovalo delovne sile (prim. tudi Kalc et al., 2020, str. 107).

»Veliki val« in kasneje: 19. in 20. stoletje

Med letoma 1750 in 1900 se je prebivalstvo Evrope kljub izseljevanju povečalo s približno 128 milijonov na 300 milijonov. Od leta 1820 do 1. svetovne vojne se je v Severno Ameriko (71 %), Južno Ameriko (21 %) in Avstralazijo (7 %) izselilo 55 milijonov Evropejcev (Ferrie & Hatton, 2013). Leta 1900 je na slovenskem etničnem ozemlju živelo skoraj 1,3 milijona prebivalcev, kar pomeni, da je od leta 1857, ko je bil izpeljan prvi uradni popis prebivalstva, to število naraslo za približno 200.000 (Statistični urad Republike Slovenije, b. d.). Število prebivalcev se je povečalo kljub temu, da se je po ocenah pred 1. svetovno vojno v ZDA izselilo približno 250.000 do 350.000 prebivalcev današnje Slovenije, vendar znatno manj kot v celotni avstro-ogrski monarhiji (podrobnejše podatke najdete v Kalc et al., 2020, str. 25; Granatir Alexander, 2009, str. 21).

Iz Avstro-Ogrske, v kateri je število prebivalcev naraščalo, v industriji pa zaradi počasnega razvoja ni bilo dovolj delovnih mest zanje, se je veliko prebivalcev izselilo

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1   V pripravi je tudi angleški prevod dela.

v druge države (Prisland, 1950), še posebej je to veljalo za revnejši in slabše razviti jug države, kamor je sodilo tudi področje današnje Slovenije (Drnovšek, 2001). Izseljevanje Slovencev je pospešila odprava tlačanstva v habsburški monarhiji (1781) in Evropi (1848), zaradi česar so razpadle mnoge kmetije, posledice pa so bile v gospodarskem smislu za številne ljudi katastrofalne (Žugel, 1987). Kmetje, ki so postali lastniki zemlje, so bili zelo obdavčeni in so se soočali s številnimi problemi, kot so naravne nesreče, tehnološko zastarele kmetije in kmetije, ki so bile premajhne, da bi omogočale preživetje. Razlog za izseljevanje pa je bil med drugim tudi izogibanje služenju vojaškega roka ali sodnemu pregonu (Drnovšek, 2001).

Glavni cilj izseljencev je bila Severna Amerika, zlasti ZDA, ki so veljale za deželo velikih priložnosti in hitrega gospodarskega razvoja, zato je bila to dežela, ki je tako med Slovenci kot tudi med drugimi narodi v Evropi vzbujala velika pričakovanja (prim. Kalc et al., 2020). Gerber (2011, str. 35) navaja, da se je med letoma 1871 in 1900 v ZDA priselilo 11,7 milijona ljudi, med letoma 1901 in 1920 pa kar 14,5 milijona; štiri petine izseljencev iz avstroogrske monarhije je odšlo v ZDA (Kalc et al., 2020, str. 45). V 19. stoletju so se izseljevali predvsem prebivalci zahodno- in severnoevropskih držav, v začetku 20. stoletja pa so začeli prihajati tudi ljudje iz južno-, srednje- in vzhodnoevropskih držav. Tako so pred 1. svetovno vojno v ZDA emigrirali prebivalci Poljske, Litve in drugih vzhodnoevropskih dežel, Italije, Španije, Avstro-Ogrske in Rusije (Hoyt, 2017; Ferrie & Hatton, 2013). Med njimi je bilo precej Slovanov, južnih Italijanov, Grkov in Judov.

Z veliko gotovostjo lahko trdimo, da je največ Slovencev prispelo v Severno Ameriko med letoma 1902 in 1903, med letoma 1905 in 1907 in leta 1913 (Kalc et al., 2020, str. 48; Gobetz, 2014), res pa je, da ni mogoče določiti točnega števila, saj Avstro-Ogrska ni vodila statistike izseljevanja, imigracijski urad v ZDA pa je Slovence do leta 1889 prišteval k avstrijskim narodom, po tem letu pa so jih šteli skupaj s Hrvati (prim. tudi Kalc et al., 2020, str. 14–15, 47–48; Žugel, 1987; Klemenčič, 1995, str. 49).

Najverjetneje je v obdobju med letoma 1892 in 1913 v ZDA prišlo okoli 86.000 oseb s Kranjskega, od tega tri četrtine od leta 1900 do 1913 (Kalc et al., 2020, str. 48). Slovenci so se predstavljali kot Avstrijci ali kot druge narodnosti, da bi se izognili naraščajočim protislovanskim in protikatoliškim težnjam v ZDA. Glede na popis prebivalstva v ZDA je leta 1910 slovenščino opredelilo kot materni jezik kar 123.631 Slovencev prve generacije in 59.800 Slovencev druge generacije (več kot 183.000 ljudi); deset let kasneje je slovenščino kot materinščino izbralo 102.744 Slovencev prve generacije in 105.808 Slovencev druge generacije (skoraj 209.000 ljudi) (Drnovšek, 1994, str. 21–22).

Slovenski priseljenci v Severno Ameriko so bili večinoma kmeti, vendar po prihodu v ZDA večina ni dobila zaposlitve v kmetijstvu, ampak so se morali prekvalificirati in opravljati druga dela. Delali so v rudnikih, kamnolomih, železarnah in jeklarnah, na železniških progah, kot kamnoseki, pristaniški in gozdni delavci (Žugel, 1987; Prisland, 1950). Leta 1865 so Slovenci živeli v kmečki skupnosti v Brockwayu v Minnesoti, ustanovili so svoje naselbine v Omahi v Nebraski (leta 1868), Jolietu v

Illinoisu (leta 1873), New Yorku (leta 1878) in Clevelandu v Ohiu (leta 1881) (Gobetz, 2014; Klemenčič, 1986). Do leta 1914 najdemo slovenske naselbine v 34 ameriških zveznih državah in treh kanadskih provincah. Največja koncentracija je bila na ameriškem srednjem zahodu, v zveznih državah Ohio, Pensilvanija, Illinois, Minnesota, Wisconsin in Michigan; poleg tega najdemo naselbine tudi v Koloradu, Kaliforniji in v nekaterih drugih zveznih državah (Kalc et al., 2020, str. 47; Žugel, 1987; Gobetz, 2014; Klemenčič & Šeruga, 2019, str. 118–126). Že v začetku 20. stoletja je največ Slovencev v ZDA živelo v Clevelandu (Susel, b. d.). Do leta 1914 je bil Cleveland tretje največje slovensko mesto, takoj za Trstom in Ljubljano, in vse do 90. let 20. stoletja je ostal največje slovensko mesto v ZDA (Plut-Pregelj & Rogel, 2010; Susel, b. d.).

Številni novi priseljenci iz srednje- in južnoevropskih držav so bili trn v peti številnim rojenim Američanom, ki so menili, da se ti priseljenci ne bodo asimilirali v taki meri kot njihovi predhodniki iz severnoevropskih držav, ki so bili protestanti, prav tako pa so se bali, da bodo novi priseljenci drastično spremenili značilnosti dežele. Njihova vera, zunanji videz, nacionalnost ali etnična pripadnost (kar so takrat imenovali »rasa«[2]), oblačila in revščina so bili vir sumničavosti in predsodkov (Gerber, 2011). Za Slovence so pogosto uporabljali slabšalne izraze, kot so »Polacks«, »Hunkies«, in »Grainers« ali »Grenish« (zadnja dva izraza izhajata iz besede »Krainers« – »ljudje ki prihajajo s Kranjskega«; Gobetz, 2014). Zaradi negativnega odnosa mnogih Američanov do pripadnikov drugih narodov so leta 1891 sprejeli zakon o imigraciji (*Immigration Act*), s katerim so uzakonili nadzor ameriške vlade nad priseljevanjem in procesom naturalizacije (Hoyt, 2017, str. 12). Strahove o ustreznosti novih priseljencev je okrepila še 1. svetovna vojna in skrbi glede lojalnosti, pa tudi povojna recesija in drugi notranji problemi v ZDA. Vse to je vodilo do novih omejitev v zvezni zakonodaji v letih 1921 in 1924, v kateri so določili kvote za priseljevanje v ZDA (za več o ameriški politiki priseljevanja gl. Klemenčič & Mrđenović, 2021, str. 85–110).

Medtem ko so v ZDA rojeni ljudje na vse novo priseljene Američane večinoma gledali enako, so obstajale v slovenskih skupnostih v Clevelandu in tudi drugje v ZDA razlike, ki jih opisujejo različni raziskovalci. Susel (b. d.) navaja:

> Že do leta 1914 se je v slovenski skupnosti pojavil temeljni in stalni ideološki prepad. Na eni strani prepada so bili verni Slovenci, ki so jih podpirali katoliški duhovniki, na drugi strani pa so bili liberalni, »svobodomiselni« in socialistično usmerjeni Slovenci. V Clevelandu so kot posledico tega ustanavljali po dve vzporedni inštituciji. Mnoga pevska društva so na primer vključevala v glavnem Slovence, ki so pripadali eni ali

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2   Leta 1918 je revija *National Geographic* objavila članek z naslovom »The races of Europe« (Evropske rase), ki dobro prikazuje idejo »rase« v tistem času, saj Slovence opisuje takole: »Po običajih in navadah se močno razlikujejo od svojih bližnjih sorodnikov Hrvatov in Slavoncev. Ker so se stalno poročali z Nemci, Madžari in Italijani, se zdi, da do pred kratkim nanje rasne zadeve niso imele vpliva. So delavni, ponižni, niso nagnjeni k upiranju ali pritoževanju. Mogoče so jih ravno zaradi tega Avstrijci obravnavali mileje kot vse druge podanike Slovane.« (Grosvenor, 1918, str. 489)

drugi strani, ta razlika pa je bila opazna tudi pri publiki. Zgodovine slovenske skupnosti v Clevelandu ni mogoče razumeti, ne da bi poznali to ideološko ločitev.

Mirjam Milharčič-Hladnik opisuje heterogenost slovenske skupnosti,

> ki je posledica ideoloških, političnih in verskih razlik med priseljenci, pa tudi regionalnega okolja, iz katerega so prišli priseljenci, ter časa preselitve. Joyce Gorshe Plemel mi je opisala primer fragmentacije v slovenski skupnosti. V 20. letih 20. stoletja je kot deklica opazila, da je njena slovenska skupnost v Clevelandu strogo ločena na »cerkvene in necerkvene ljudi«. To zapuščino so prinesli iz stare dežele in bi jo lahko poimenovali tudi »katoliški in nekatoliški« ali »črni in rdeči« ali »nazadnjaki in naprednjaki«. Vse kulturne, umetniške, bratske in družbene organizacije so bile organizirane okoli tega razkola. Povedala mi je, da so živeli ločeno »po ulicah, po mostovih« in da se celo niso poročali med seboj, v skupnosti pa je bilo vse po dvoje. Tako na levi kot tudi na desni strani politično ideološkega kot tudi dejanskega mostu so bili zbori, gledališke skupine, bratske organizacije, časopisi in založniki, narodni domovi in rekreacijski centri. (Milharčič-Hladnik, 2007, str. 234–235)

Po sprejetju imigracijske zakonodaje v 20. letih 20. stoletja so Slovenci prihajali v ZDA v veliko manjšem številu, glavni razlog pa je bil ponovno združevanje družin (Klemenčič, 1986, str. 9). Po 2. svetovni vojni je bila ameriška javnost bolj naklonjena priseljevanju. Sprva zaradi zakonsko določenih kvot evropskih beguncev niso sprejemali, nato pa je predsednik Harry Truman podpisal direktivo in izvršni ukaz, s čimer so določili kvote za razseljene osebe. Po letu 1945 je bilo sprejetih več imigracijskih zakonov, ki so dopuščali izjeme ali povečanje kvot, določenih z zakoni iz 20. let 20. stoletja. Tako je na primer zakon o razseljenih osebah iz leta 1948 omogočil, da je v ZDA prišlo 200.000 ljudi (Migration Policy Institute, 2013). Veliko Slovencev, ki so emigrirali po 2. svetovni vojni, je bilo beguncev, ki so bežali pred fašizmom ali komunizmom. Približno 100.000 Slovencev je zapustilo Jugoslavijo in zbežalo v ZDA, Kanado, Avstralijo in Argentino (Allcock et al., 2022). Ti novi priseljenci so se naseljevali v obstoječih slovenskih skupnostih v ZDA ter se podobno kot v preteklosti integrirali v verskem, političnem in ideološkem smislu.

V drugi polovici 20. stoletja se je izseljevanje iz Slovenije v ZDA in druge države skoraj ustavilo (Allcock et al., 2022). Danes v ZDA slovenski priseljenci niso več tako tesno povezani in živijo precej razpršeno, vendar se v tradicionalno slovenskih naselbinah na prireditvah še vedno srečuje večje število ljudi slovenskega porekla, ki na ta način ohranjajo občutek skupnosti. Prav tako z ohranjanjem organizacij v ZDA in povezav z organizacijami v Sloveniji ohranjajo spomin na svojo prvotno kulturo.

SLOVENSKI PRIROČNIKI

V tem poglavju bomo analizirali šest angleško-slovenskih slovarjev oz. priročnikov, ki so izšli med letoma 1895 in 1919, to je v času najbolj množičnega izseljevanja Slovencev. Z izjemo slovarja Silvestra Košutnika z naslovom *Ročni slovensko-angleški in angleško slovenski slovar: Zlasti namenjen izseljencem v Ameriko*, ki je izšel v Ljubljani in je bil namenjen priseljencem v ZDA in Slovencem, ki so načrtovali odhod v ZDA, so vse slovarje oz. priročnike napisali izseljenci v ZDA in ti slovarji oz. priročniki so izšli v ZDA. V nadaljevanju sledi splošni opis makrostrukture[3] teh slovarjev oz. priročnikov skupaj s primeri iz posameznih del.

Jeram (1895)

Peter Josip Jeram je bil rojen leta 1857[4] v Smolevi pri Železnikih, umrl pa je leta 1897 v Covelu v okrožju Mendocino v Kaliforniji (Sedmak, 2021a; Cesar-Nedzbala, 1990). Obiskoval je Seminar sv. Frančiška v Milwaukeeju v Wisconsinu in leta 1880 postal duhovnik. Najprej je služboval v Minnesoti in Južni Dakoti, kjer je pisal *Slovensko-angleško slovnico* (približno med letoma 1889 in 1892) (Sedmak, 2021a; 2021b; 2021c; Cesar-Nedzbala, 1990; Anonimno, 1895). Slovnica je izšla leta 1895 v Towerju v Minnesoti.

Na naslovni strani Jeramove knjige so vsi podatki samo v slovenščini in tudi angleška slovnica je razložena samo v slovenščini. Pod naslovom »Predgovor« najdemo samo naslednji citat Janeza Trdine: »Vsak naj se trudi po svoji moči; kdor zamore mnogo, ta naj dela mnogo; komur je pa narava manjše zmožnosti podelila, ta naj tudi te obrne narodu na korist.«

Na straneh 3–18 je zelo podrobno opisan izgovor posameznih glasov v angleščini. Na primer, v razdelku A) §43.1 avtor obravnava izgovor angleškega samoglasnika *a*, navaja primere angleških besed, ki vključujejo *a* (skupaj s prevodi teh besed v slovenščino) in primerja izgovor angleških besed s slovenskimi besedami, ki vključujejo *e* ali *a*. Na splošno je razlaga precej zapletena (gl. Sliko 1), in vprašanje je, ali so si uporabniki z njo lahko pomagali, saj je bila večina izseljencev le slabo izobražena.

Prvi del knjige z naslovom »Prvi oddelek« (str. 17–81) vsebuje naloge prevodov. Kot primer navajamo II. nalogo (gl. Sliko 2), ki se začne s splošnimi informacijami, ki naj bi uporabniku pomagale pri prevodu povedi. V tej nalogi je to spisek slovenskih besed z angleškimi ustrezniki, povezanimi z družino oz. družinskimi člani, temu spisku pa sledi prikaz spregatve glagola *(to) have* (»imeti«) v trdilni in vprašalni obliki. Sledi vaja z angleškimi povedmi, ki vključujejo prej navedeno besedišče, povezano

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3   Vsi deli, ki jih slovar obsega, razen notranje zgradbe slovarskega sestavka.

4   Grafenauer (2013) navaja, da je bil Jeram rojen okoli leta 1865, kar je malo verjetno, ker se druge letnice ne ujemajo. Tudi Klemenčič (1999, str. 373) navaja kot letnico rojstva leto 1857. V istem viru najdemo tudi podrobnosti o Jeramovem življenju in delu (Klemenčič, 1999, str. 373–380),
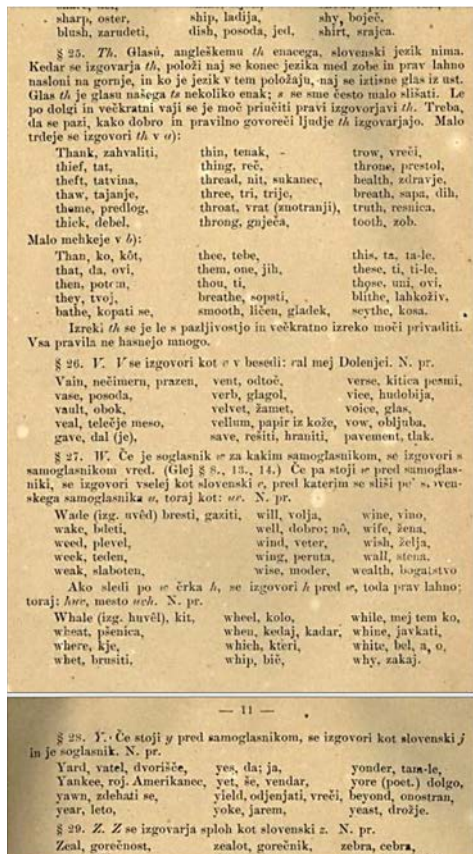
Slika 1: Primer opisa izgovora fonema *th* (vir: Jeram, 1895, str. 10).

Pod angleškimi povedmi, ki jih je treba prevesti (Slika 2), Jeram pod naslovom »Pravilo« razloži, da je v angleščini oblika samostalnika vedno enaka, ne glede na sklon in število. Temu sledi opomba: »Dobro poglej vsako besedo, kako se piše, če želiš pravilno angleški pisati in lično pa pravilno govoriti znati.« V naslednjem razdelku sledi nova vaja, v kateri so navedene povedi v slovenščini, povezane s temo družine, ki jih je očitno treba prevesti v angleščino, čeprav tudi v tej vaji ni nobenih navodil.

s temo družine, povedi pa so med seboj tematsko povezane. Na začetku vaje ni navodila, kaj je treba narediti, očitno pa je bilo treba povedi prevesti v slovenščino. Prevodne naloge pri poučevanju tujega jezika imajo dolgo tradicijo, saj jih najdemo že v dvojezičnih priročnikih stare grščine in latinščine, ki so jih v 3. stoletju uporabljali v Rimu (Hernández Jaramillo, 2019). V 18. in 19. stoletju je bilo prevajanje ena od metod poučevanja tujih jezikov v Evropi (gl. Zhou & Niu, 2015), zato ni nič nenavadnega, če jo je v svoji slovnici uporabil tudi Jeram. Zanimivo pa je, da je neki anonimni recenzent leta 1895 Jeramov pristop k poučevanju slovnice povezoval s pristopom Heinricha Gottfrieda Ollendorffa, katerega metoda je temeljila na konverzaciji.
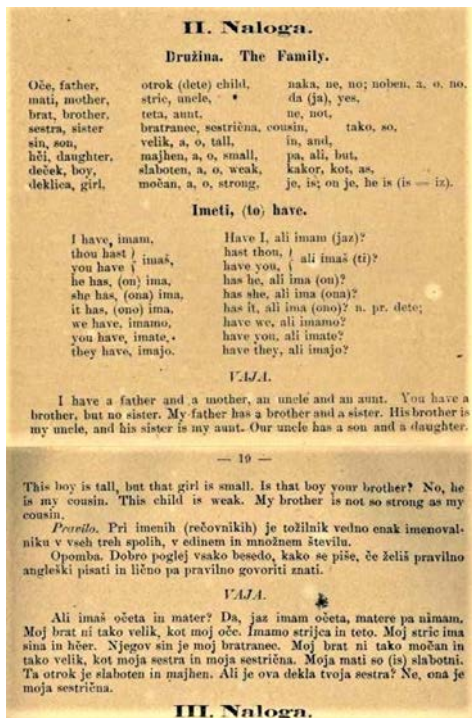
Slika 2: Prvi oddelek, II. naloga, tematsko zasnovana prevodna naloga (vir: Jeram, 1895, str. 18, 19).

Ostale naloge v prvem delu so sestavljene po enakem vzorcu kot II. naloga. Obravnavanih je 26 tem, npr. družina, obedi, človeško telo, obleka, orodje, vrt, domače živali, rudnine itd. V sklopu posameznih tem so razložena številna slovnična poglavja, kot so (določni in nedoločni) člen, zaimki, naklonski glagoli, časi in tvorba množine. Prevodne vaje vključujejo tudi vzorce pisem, povezanih s temami.

Drugi del knjige, poimenovan »Drugi oddelek« (str. 82–173), ima naslov »Elementarna Slovnica«. V nasprotju s prvim delom so tu obravnavane različne slovnične vsebine, in ne tematska področja. Zanimivo je, da so nekateri naslovi v angleščini, nekateri v slovenščini, nekateri pa v obeh jezikih. Kot primer lahko navedemo XLVII. nalogo (str. 87–88), v kateri je razložena nepravilna množina samostalnikov (»Nepravilna množna števila«). Začne se s seznamom angleških samostalnikov v ednini, ki jim sledi slovenski ustreznik, nato pa nepravilna množinska oblika, ki ji sledi slovenski ustreznik. Za seznamom samostalnikov z nepravilno množino je prevodna vaja (»Exercise«) v obliki spiska povedi, ki med seboj niso tematsko povezane. Mogoče bi nekako še lahko tematsko povezali poved *Wine has drowned more men then [sic] water* (»V vinu se je utopilo več ljudi kot v vodi«) in *The more women look in to their glasses, the less they look to their homes* (»Bolj ženske gledajo v kozarce, manj gledajo na svoj dom«), vendar pa ti dve povedi nikakor nista konceptualno povezani s povedjo *Geese have very valuable feathers* (»Gosi imajo zelo dragoceno perje«) ali *The Dutch are renowned for their cleanliness* (»Nizozemci so znani po svoji čistoči«). Povedim v vaji prevajanja sledi kratek slovarček angleških besed s slovenskimi ustrezniki, ki naj bi bil v pomoč pri prevodu. Nato sledi razlaga slovnične teme, tj. nepravilne množine.

V drugem delu knjige se nekatere naloge začnejo s povedmi, ki jih je treba prevesti, vrstni red elementov pa je včasih tudi drugačen in se lahko naloga začne z besediščem ali z opisom slovnične teme, medtem ko naloge prevajanja sledijo v nadaljevanju. Jeram v slovnici včasih uporablja terminologijo, ki ni v skladu s sedanjimi slovnicami, na primer »sklanja samostalnikov« namesto »sklanjanje samostalnikov«, medtem ko je uporabljeni angleški termin *declension of substantives* enak sodobnemu poimenovanju.

Drugemu oddelku sledita dve strani o utežnih enotah in merah (»Mera in vaga«), nato pa dve strani popravkov. Na koncu razdelka s popravki je Jeram dodal naslednjo opombo (str. 177): »Druge manjše popravke si učenec lahko sam popravi.« Na zadnjih dveh straneh je kazalo.

S sodobnega vidika se zdi struktura Jeramovega priročnika precej zapletena in ne ravno prijazna za uporabnika, besedilo je včasih napisano precej nejasno in neorganizirano. Kljub tem pomanjkljivostim se je slovensko-ameriški leksikograf Fran/Frank Javh Kern zelo pohvalno izrazil o Jeramovi slovnici. Dejal je, da občuduje neizmerno prizadevanje Jerama pri pisanju knjige, in nadaljuje, da knjigi Victorja Kubelke (slovnica in slovar) nista dosegli Jeramovega dela z vidika originalnosti in popolnosti (Javh-Kern, 1937, str. 28).

Frančišek Lampe, ki je ocenil Jeramovo delo na Slovenskem, je zapisal:

> A toliko vendar nimamo v lasti angleščine, da bi mogli preiskovati napake v tej slovnici. Zatorej rajši gospodu pisatelju izrečemo zahvalo za prelepi književni dar iz Amerike in pa prošnjo, naj bi kmalu izdal tudi slovensko-angleški besednjak, o katerem pravi na str. 6: »Kadar se dvomi o izgovarjanju kake besede, pogledati je treba v: Slovensko-angleški besednjak, ki bo sledil slovnici, če jo Slovenci prijazno vsprejmó.« (Lampe, 1895, str. 767)

Ker je Jeram umrl leta 1897, torej le dve leti po izidu njegove slovnice, slovarja ni nikoli izdal.

Kubelka (1904)

Viktor/Victor Kubelka, izseljenec, ki je živel v New Yorku, je izdal tri dela, ki so bila med slovenskimi izseljenci izredno priljubljena. Rojen je bil v Ljubljani leta 1879, leta 1918 je postal naturaliziran državljan ZDA, umrl pa je leta 1961 v zvezni državi New York.

Kubelkovo prvo leksikografsko delo je priročnik *Slovensko-angleški žepni rečnik v olajšavo naučenja obeh jezikov, Slovenian-English Pocket Dictionary to Facilitate the Study of Both Languages*, ki je izšel leta 1904. Na prvi strani je celostranski oglas za podjetje Frank Zotti & Co., ki je imelo sedež v New Yorku, opravljalo je bančne stori-tve (vključno z možnostjo pošiljanja denarja v domovino za izseljence), imelo pa je tudi druge oddelke, ki so se ukvarjali s prodajo vozovnic za parnik in z drugimi storitvami, ki so jih izseljenci potrebovali. Strani z oglasom sledijo kolofon in dve naslovnici, ena v angleščini in ena v slovenščini, na obeh pa je citat Francisa Bacona, ki v angleščini ni naveden pravilno, saj bi se moral glasiti: *Reading maketh a full man; conference a ready man; and writing an exact man*. Temu sledijo uvod v angleščini (ena stran), uvod v slovenščini (ena stran), angleška abeceda z izgovorom vseh črk in slovenska abeceda. V uvodu je razložen tudi izgovor angleških samoglasnikov, dvoglasnikov in soglasnikov.

Osrednji del je slovar (str. 24–122),[5] v katerem so slovenske iztočnice zapisane v prvem stolpcu, v drugem stolpcu sledijo angleški ustrezniki, v tretjem pa izgovor angleškega ustreznika. Iskanje po slovarju olajšata dve živi pagini na vsaki strani.

Slovarju sledi razdelek s pogovori »Easy dialogus« oz. »Lahki pogovori«, naslovi pa so »Pozdravi«, »V družbi«, »Povpraševanja«, »Življenju potrebne stvari« in »Za delom«. Naslednji dve poglavji sta namenjeni dodatnim informacijam o ZDA: imena ameriških zveznih držav z naslovom v slovenščini (»Imena Zjedinjenih držav«) skupaj s krajšavami in izgovorom; »Denar Zjedinjenih držav« z imeni kovancev in bankov-cev in izgovarjavo kovancev in bankovcev ter načini zapisa posameznih vrednosti in vrednosti v kronah. Pod temo »Imena« so navedena slovenska osebna imena z

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5   V nobenem od slovarjev, ki smo jih preučevali v raziskavi, ni podatkov o številu iztočnic.

ustrezniki v angleščini, pri ustreznikih v angleščini pa je naveden tudi izgovor. Na zadnji strani je kazalo, na zadnji platnici pa oglas za notarja, seznam predstavnikov različnih družb in oglas za tiste, ki želijo poslati denar v domovino. Sledi še oglas za nakup vozovnic za parnike v različne kraje v Evropi, ZDA, Južni Afriki in Avstraliji, ki vključuje tudi nakup vozovnic za vlak.

Kubelka (1912a)

Slovensko-angleški razgovori, Slovenian-English Interpreter je priročnik z uporabnimi komunikacijskimi obrazci, ki obsega 136 strani. Natisnila ga je tiskarna Press of Stettiner Bros. iz New Yorka, začne pa se z naslovno stranjo v slovenščini in angleščini, kolofonom in kazalom v slovenščini, kjer je naštetih vseh 16 tem (gl. spodaj).

Priročnik je bil za nove priseljence neprecenljiv, kar potrjuje tudi Drnovšek (2006, str. 10), ki pravi, da večina izseljencev ni znala jezikov držav, skozi katere je potovala, in le redki so govorili angleško, tako da so bila navodila, napisana v materinščini, več kot dobrodošla. Celo na otoku Ellis Island[6] v New Yorku so bili priseljencem na voljo dvojezični priročniki, kot so bili *Slovensko-angleški razgovori*, saj so morali poznati preproste dialoge, če so se želeli sporazumevati v novem okolju.

Šestnajst različnih tem, navedenih v kazalu, lahko razdelimo v naslednje sklope:
- potovanje in prihod v ZDA (»Potovanje«; »Odprava prtljage«; »Železnica« »Na kolodvoru«; »Naselniški otok«);
- bivanje in delo (»Za delom«; »Najem stanovanja«);
- obroki (»Zajtrk«; »Lonč in kosilo«);
- spraševanje za pot (»Povpraševanja«);
- na pošti in v banki (»Bankar«; »Pošta«);
- vstajanje zjutraj in spravljanje spat (»Jutro«; »Vstajanje«; »K počitku«);
- pogoste teme pogovorov (»Vreme«);
- pozdravi in poslavljanje (»Pozdrav in nagovor«);
- obiskovanje (»Obisk«).

Seznamu tem sledi osrednji del s tipičnimi komunikacijskimi obrazci, kratkimi dialogi in drugimi besedili, ki naj bi po avtorjevih predvidevanjih koristila slovenskim priseljencem. Del teme »Naselniški otok« (tematski sklop »Potovanje«) je prikazan na Sliki 3. V prvem stolpcu so navedeni komunikacijski obrazci v slovenščini, v drugem stolpcu najdemo njihove prevode v angleščino, v tretjem pa izgovor angleških izrazov; struktura je torej enaka kot v Kubelkovem slovarju iz leta 1904. Izgovor ni zapisan niti v mednarodni fonetični abecedi niti v kateri koli drugi standardizirani obliki zapisa izgovora, ampak je prilagojen rojenemu govorcu slovenščine, ki ne

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6   Otok v pristanišču v New Yorku, glavna vstopna točka za priseljence v ZDA med letoma 1892 in 1954.

pozna angleškega fonološkega sistema. Zapis je zelo poenostavljen, poleg tega so angleški fonemi, ki v slovenščini ne obstajajo (npr. ɵ, ð, æ), izpuščeni.

NA ELLIS ISLANDU

(Naselniški otok.)

ON ELLIS ISLAND.

(on elis ajlend.)

SLOVENSKO	ANGLEŠKO	IZGOVARJANJE
Kako je vaše ime?	*What is your name?*	vot is jur nem?
Koliko ste stari?	*How old are you?*	hau old ar ju?
Ali ste oženjeni?	*Are you married?*	ar ju merid?
Ne, gospod, samec sem.	*No, Sir, I am single.*	no, ser, aj em singl.

Slika 3: Naselniški otok (vir: Kubelka, 1912a, str. 9).

Na koncu priročnika je celostranski oglas za Avstro-Amerikansko Parobrodarsko Progo (naslov pisarne je v Trstu).[7] Na zadnji platnici sta slika parnika in seznam parnikov, ki plujejo med Trstom in New Yorkom, skupaj z nosilnostjo.

Kubelka (1912b)

Slovensko-angleška Slovnica, Tolmač, Spiskovnik in Navodilo za Naturalizacijo. Angleško-Slovenski in Slovensko-Angleški Slovar. Slovenian-English Grammar, Interpreter, Letterwriter and Information on Naturalization. English-Slovenian and Slovenian-English Dictionary Viktorja J. Kubelke je tako po strukturi kot tudi po obsegu njegov najobsežnejši priročnik, ki obsega 431 strani, vključno z oglasi. Naslovnicama v slovenščini in angleščini sledi uvod v slovenščini, napisan avgusta 1912. Kubelka (1912b, str. 9) v uvodu pove naslednje: »Povpraševanje po različnih slovensko-angleških knjigah, katere sem v zadnjih osmih letih izdal, je bilo toliko, da sem se odločil izdati knjigo v novi popolnoma predelani, povečani in zboljšani obliki.« V nadaljevanju pove: »Knjiga je tako urejena, da zadostuje vsaki potrebi in vsak, kateri jo bode rabil, bode gotovo zadovoljen ž njo« (Kubelka, 1912b, str. 9).

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7   Avstro-Amerikanska Proga je bila avstrijska ladijska prevozniška družba, ki se je ukvarjala s prevozi izseljencev in se je večkrat pojavljala tudi v avstrijski zakonodaji izseljevanja. Več o tej družbi gl. Klemenčič, 2001.

Knjiga je razdeljena na šest delov:
- »Angleška slovnica«;
- »Vsakdanji razgovori«;
- »Slovensko-angleški spiskovnik«;
- »Navodilo za naturalizacijo«;
- »Angleško-slovenski slovar«;
- »Slovensko-angleški slovar«.

Na koncu knjige (za slovensko-angleškim slovarjem) je kazalo v slovenščini, temu pa sledi šest oglasov. Prvi oglas je za Avstro-Amerikansko Parobrodarsko Progo, vendar oglas ni enak oglasu v priročniku *Slovensko-angleški razgovori* (Kubelka, 1912a), pa tudi naslov podjetja ni v Trstu, temveč v New Yorku. Drugi oglas je za K. W. Kempfa, glavnega predstavnika Avstro-Amerikanske Proge na zahodu z naslovom v Chicagu. Tretji oglas je za tednik *Narodni vestnik* in za njegovega izdajatelja, Slovensko tiskovno družbo v Duluthu v Minnesoti. Sledi oglas za Franka Sakserja, zastopnika vseh parobrodnih družb, ki pomaga izseljencem pri hitremu pošiljanju denarja domov. Nato najdemo še oglas za *Glas naroda*, ki se deklarira za »edini slovenski dnevnik v Ameriki«, in pa oglas za Kubelko kot založnika slovensko-angleških knjig. Na zadnji platnici sta, podobno kot pri priročniku *Slovensko-angleški razgovori* (Kubelka, 1912a), slika parnika in seznam parnikov, ki plujejo med Trstom in New Yorkom.

Košutnik (1912)

Silvester Košutnik (1874–1944) je bil učitelj, pisatelj in prevajalec. Prevajal je iz srbohrvaščine, nemščine, francoščine, angleščine in italijanščine v slovenščino; bil je prvi prevajalec *Koče strica Toma* (iz nemščine) v slovenščino (Hladnik, 1983). Njegov slovar *Ročni slovensko-angleški in angleško-slovenski slovar: Zlasti namenjen izseljencem v Ameriko* je edino analizirano delo v okviru naše raziskave, ki je izšlo v Ljubljani, ne v ZDA, naslov slovarja pa je samo v slovenščini.

Naslovni strani in kolofonu sledi Predgovor v slovenščini, v katerem Košutnik (1912, str. 4) pravi: »Končno naj še omenim, da naj bo v dokaz, kako je slovarček dobro došel našim izseljencem, to, da je bil v kratkem času razprodan ves prvi natisk; primoran sem bil tedaj vsled povpraševanja po njem prirediti drugi natisk.«

V zgornjem navedku Košutnik omenja slovar iz leta 1904, kjer na naslovnici ni njegovega imena. V »Predgovoru« tudi poudari, da so v tem slovarju »zbrane najnavadnejše besede, torej tiste, ki se v vsakdanjem življenju rabijo najpogosteje« (Košutnik, 1912, str. 1). Večina preostalega dela predgovora je posvečena razlagi angleškega izgovora. Na koncu razlage izgovora avtor pravi: »Takih in enakih primerov bi se dala našteti še mnogobrojna kopa, a storilo bi se to brez vspeha za one sloje, katerim je namenjena ta knjižica. Tem velja najbolj pravilo, da je treba dobro slušati, kadar se govori angleški in da je treba tudi vporabiti vsako priložnost, ki se le nudi za vaje v izgovarjanju« (Košutnik, 1912, str. 4).

Slovarski del, ki sledi, je dvorelacijski: slovensko-angleški slovar (str. 5–63) in anglešsko-
-slovenski slovar (str. 64–148). Na zadnji strani knjige (str. 149) je seznam knjig založnika
Antona Turka, ki je izdal tudi Košutnikov slovar in njegov prevod *Koče strica Toma*.

Slovensko-angleški slovar ima zelo preprosto mikrostrukturo:[8] iztočnica v sloven-
ščini in ustreznik(i) v angleščini (Slika 4). Angleško-slovenski slovar je 65 strani daljši
(Slika 5) in ima naslednjo strukturo: iztočnica v angleščini in poenostavljen izgovor, v
katerem je primarni naglas zapisan z apostrofom, ki sledi naglašenemu zlogu; sledijo
ustrezniki, ločeni med seboj z vejico, čeprav ne gre vedno za sopomenke.

v.

v - in, into, at, to, within.
vabiti - to lade in, to load in to
  invite.
vaditi - to exercise, to practise.
vaja - exercise, practice.
vajen - exercised, versad, expert.
valjati - to roll, to turn about.
varati - to cheat, to deceive.

včasi - frequently, often, some-
  times.
včeraj - yesterday.
vdova - widow, dowager.
vdovec - widower.
več - more.
večen - eternal, everlasting, per-
  petual.

Slika 4: Slovensko-angleški del Košutnikovega slovarja (vir: Košutnik, 1912, str. 56).

hold, hold - držati, obdržati,
  ceniti, meniti, dobiti, kratko-
  časiti, držati se, vztrajati.
hole, hol - luknja, votlina, iz-
  govor.
hollow, bol'lo - izvotljen, ne-
  prav; votlina, luknja, hodnik,
  rov.
holy, ho'li - svet, praznič;
  praznik.
home, hom - dom, domovje;
  stanovanje, bivališče; domač,
  domu, doma.

Slika 5: Angleško-slovenski del Košutnikovega slovarja (vir: Košutnik, 1912, str. 103).

Tako v slovensko-angleškem kot tudi v angleško-slovenskem delu podpičje načelo-
ma ločuje različne besedne vrste, čeprav raba ni dosledna. Iz Slike 5 je na primer
razvidno, da angleški iztočnici *holy* sledi slovenski pridevnik *svet*, ki ga od nasled-
njega ustreznika *praznič* loči vejica. Tema dvema pridevnikoma sledi podpičje,

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8   Notranja zgradba slovarskega sestavka s podrobnimi podatki o iztočnici.

nato pa samostalniški ustreznik *praznik*. Po drugi strani je pri iztočnici *home* prvo podpičje rabljeno drugače, saj ne ločuje ustreznikov različnih besednih vrst: ustreznika *dom* in *domovje* sta s podpičjem ločena od pomensko različnih ustreznikov *stanovanje, bivališče*. Zadnji trije ustrezniki pri iztočnici *home* so pridevnik in prislova, ki jih od samostalniških ustreznikov ločuje podpičje. Pridevnik *domač* od prislovov *domu, doma* ni ločen s podpičjem, kot bi pričakovali, temveč z vejico.

Kern (1919)

Fran/Frank Javh Kern je bil rojen leta 1887 v Breznici nad Škofjo Loko, umrl pa je leta 1977 v Clevelandu v Ohiu. V ZDA je prišel leta 1903 z gimnazijsko izobrazbo, nato je v Saint Paulu v Minnesoti obiskoval Seminar svetega Pavla, kasneje pa je doštudiral medicino. Služboval je kot zdravnik v Clevelandu in postal zelo pomemben in spoštovan član skupnosti (podrobnejši življenjepis Franka J. Kerna, gl. Klemenčič, 1995, str. 88–92).

Kernov *A Complete Pronouncing Dictionary of the English and Slovene Languages for General Use*, *Popoln angleško-slovenski besednjak z angleško izgovarjavo* je izšel v času, ko se je izseljevanje Slovencev v ZDA že umirjalo, vendar je število ljudi slovenskih korenin v ZDA doseglo svoj vrh, zlasti v Clevelandu, kjer je Kern živel. V svojih spominih Kern opiše nastajanje slovarja in pove, da je angleško-slovenski del začel pisati, ko je bil zadnje leto v Seminarju svetega Pavla (leta 1905). S pisanjem je nato nadaljeval občasno, zlasti med dopustom. Gradivo je pripravljal štirinajst let in ga oddal v tisk leta 1919, ko je razsajala španska gripa in je imel kot zdravnik zelo veliko dela. Doda, da slovar sicer ni vrhunsko delo, je pa najboljše, kar je lahko nastalo v tistem času. Pravi, da je oblikoval svoj sistem zapisa izgovora angleških besed, ki temelji na slovenskem fonetičnem zapisu in se mu zdi primeren in vreden posnemanja (Javh-Kern, 1937, str. 28, 30).

Na naslovnici je najprej naveden angleški naslov, ki mu sledi še naslov v slovenščini. Za naslovnico in kolofonom sta uvod v angleščini (str. III) in uvod v slovenščini (str. IV–V). V obeh uvodih Kern pojasni, kako je obravnaval izgovor, vendar je njegova razlaga v angleškem uvodu natančnejša; tu namreč razloži, da je sledil najnovejšim smernicam in da se je ravnal po *New Standard Dictionary* (Kern, 1919, str. III). V slovenskem uvodu takole pojasni zapis izgovora angleških besed:

> Izgovarjavo angleških besed zaznamujem kolikor mogoče enostavno in dosledno. Izgovarjave se je mogoče naučiti le s pomočjo žive besede, vsled tega nisem nanjo polagal posebne važnosti; upam, da je učenci ne bodo vzeli preveč doslovno, kakor je zaznamovano v knjigi. Diakritična znamenja in zapisana izgovarjava so samo za prvo pomoč; učiti se je treba s pomočjo posluha in govorjenja. Pisava in izgovarjava angleških besed je označena, kakor je v navadi v Ameriki, ter se nekoliko loči od kontinentalne angleščine. (Kern, 1919, str. IV)

Iz te razlage je razvidno, da je med avtorji priročnikov oz. slovarjev, ki so predmet naše raziskave, Kern edini, ki je posvečal pozornost razliki med ameriškim in britanskim pravopisom in izgovorom.

Na straneh VI–VII so pod naslovom »Pojasnila« navodila za uporabo slovarja. Kern v večjem delu razlaga zapis izgovora, sledita razdelek o zloženkah in razdelek o rabi slovarja (»Kako rabiti besednjak«), v katerem pojasni, da so angleške besede vključene po abecednem redu, razloži pa tudi rabo živih pagin. Že po pregledu prvih nekaj strani je jasno, da je Kernov slovar med vsemi šestimi analiziranimi deli strokovno najbolj dovršen priročnik. Uvodnemu delu sledi angleško-slovenski enorelacijski slovar (str. 1–270), ki je od vseh šestih preučevanih priročnikov po strukturi najbolj podoben sodobnim slovarjem.

Kernov slovar je natisnjen v dveh stolpcih na strani. Na vsaki strani sta dve živi pagini, sestavljeni iz treh črk (Slika 6). Živa pagina nad levim stolpcem vsebuje prve tri črke prve iztočnice na tej strani, živa pagina nad desnim pa prve tri črke zadnje iztočnice na strani. Od ostalih preučevanih slovarjev ima živo pagino samo še Kubelkov slovar iz leta 1904. Angleška iztočnica je natisnjena krepko, izgovor je zapisan v oklepaju, nato sledijo ustrezniki.

V tem slovarju je raba ločil veliko bolj sistematična, zlasti če jo primerjamo z rabo ločil v Košutnikovem slovarju iz leta 1912. Podpičje je rabljeno na dva načina; z njim ločuje semantično različne ustreznike iste besedne vrste. Na Sliki 6, na primer za iztočnico *utter* navaja štiri pridevniške ustreznike: *skrajen, prevelik, popoln* in *cel*. Prva dva (*skrajen* in *prevelik*) sta zaradi semantičnih razlik med seboj ločena s podpičjem. Več kot očitno je Kern menil, da sta si zadnja dva pridevnika (*popoln* in *cel*) semantično bližja, zato ju je ločil z vejico. Tudi če se ne strinjamo s Kernovim izborom pridevniških ustreznikov oz. z njegovo presojo semantične bližine, je povsem jasno, da je njegov pristop sistematičen. Poleg tega uporablja podpičje tudi za ločevanje ustreznikov različnih besednih vrst, čeprav sicer v slovarju ne označuje besedne vrste. Če kot primer vzamemo isto iztočnico (*utter*), sta zadnja dva ustreznika (*izreči* in *govoriti*) glagola in sta zato od predhodnega pridevnika *cel* ločena s podpičjem. Kern dva glagola med seboj ločuje z vejico, čeprav ne gre za sopomenki. Na zadnjih treh straneh (str. 271–273) je seznam nepravilnih glagolov.

Kern je sestavljanje slovensko-angleškega slovarja dojemal kot dolžnost, saj naj bi s tem podpiral slovensko skupnost v ZDA in hkrati vzdrževal stik z novonastalo državo Jugoslavijo. V tem smislu je bila njegova politična usmerjenost usklajena z njegovim slovarskim projektom. V zadnjem odstavku angleškega uvoda Kern poudari, da bi moral biti slovar koristen za tisoče slovenskih priseljencev v ZDA in tudi za vse tiste, ki so se ravno osvobodili izpod »habsburškega jarma« in zdaj živijo v novi Jugoslaviji s svojimi brati Hrvati in Srbi. Poznavanje Amerike in njenega jezika naj bi pripomoglo k utrjevanju vezi, ki bo v prihodnosti povezovala ta dva naroda (Kern, 1919, str. III).

Slika 6: Izsek iz Kernovega slovarja (vir: Kern, 1919, str. 258).

ZAKLJUČEK

> Ti ljudje so moji rojaki in zadnjih enajst let je moj največji življenjski cilj, da jih združim v koloniji, kjer lahko živijo srečno in v izobilju. (Peter Josip Jeram, 27. marec 1896, citirano v *The Ukiah Daily Journal*; Sedmak, 2021b)

Slovarji in drugi priročniki, ki smo jih preučevali, so nastali konec 19. in v začetku 20. stoletja, da bi pri učenju angleščine in prilagajanju novemu okolju in kulturi pomagali slovenskim priseljencem v ZDA, ki so se »osvobodili izpod habsburškega jarma« (Kern, 1919, str. III). V tem prispevku smo obravnavali šest knjig, obstajajo pa še druge, ki bi jih bilo treba preučiti v prihodnosti; zelo verjetno obstajajo tudi priročniki, ki jih (še) nismo našli. V tem prispevku smo se osredotočali predvsem na makrostrukturo; mikrostrukture smo se dotaknili le redko, vendar jo bo v nadaljevanju raziskovanja treba podrobneje analizirati. Na podlagi dosedanje analize smo prišli do naslednjih razmislekov in preliminarnih zaključkov.

Nekateri od analiziranih priročnikov (Kern 1919 in Košutnik, 1912) so bolj ali manj standardni tiskani slovarji, ki so blizu tudi sedanjim uporabnikom, pri drugih (Kubelka 1904; 1912a; 1912b) pa gre za bolj hibridna dela, ki so nastala zaradi potreb potencialnih uporabnikov v določenem obdobju in niso temeljila na specifičnih znanstvenih modelih. Po drugi strani je bila Jeramova slovnica iz leta 1895 verjetno kar precej zapletena in nerazumljiva za večino neizobraženih ali slabo izobraženih slovenskih priseljencev v ZDA, ki jim je bila namenjena, čeprav sledi prevladujočim modelom za učenje jezika v tistem času, ne vključuje pa tipov nalog, ki jih najdemo v sodobnih učbenikih za učenje tujega jezika. Jeramova slovnica je bila mišljena kot komplet s slovarjem, ki pa ni nikoli izšel, ker je Jeram umrl, še preden mu ga je uspelo sestaviti.

Ne glede na obliko ali vsebino analiziranih priročnikov je povsem jasno, da so bili vsi avtorji motivirani za pisanje teh priročnikov zaradi velikega občutka dolžnosti do sonarodnjakov, ki so ob prihodu v ZDA nujno potrebovali pomoč pri učenju jezika; v veliki meri so to svojo dolžnost tudi izpolnili. Nekatere knjige so bile namenjene učenju angleščine v obliki dialogov na teme, ki so bile relevantne v vsakodnevnih pogovorih rojenih govorcev angleščine v Ameriki v tistem času. Še pomembneje je, da so v teh knjigah slovenski priseljenci našli navodila o tem, kako naj postanejo naturalizirani državljani, kar ni bilo preprosto v nobenem obdobju ameriške zgodovine. Kot smo lahko videli, imajo ti priročniki večinoma zelo preprosto strukturo – verjetno je izjema *Slovensko-angleška slovnica* Petra Josipa Jerama (Jeram, 1895) – kar je nadvse pomembno, če vemo, kakšna je bila izobrazbena struktura uporabnikov.

Veliko priročnikov je med drugim vključevalo oglase. Ni povsem jasno, ali so s tem sofinancirali tiskanje knjig, je pa povsem jasno, da so bili oglasi izjemno pomembni za ciljno publiko. Oglasi za ameriško-slovenske časopise so slovenske priseljence seznanili z viri družbene kohezije, saj so bili ob prihodu v ZDA dobesedno vrženi v vodo in so se morali naučiti plavati v novem in neznanem okolju. Oglasi za parnike so pomagali ljudem, ki so načrtovali izselitev ali so želeli v ZDA pripeljati sorodnike. Oglasi so bili v pomoč priseljencem pri vzdrževanju stikov s sorodniki in prijatelji v domovini, ker so dobili informacije o možnostih in načinih pošiljanja denarja domov.

Priročniki, ki smo jih analizirali v tem prispevku, kot tudi drugi tovrstni priročniki, ki so bili namenjeni slovenskih priseljencem v ZDA, so bili natisnjeni v majhnih nakladah. Danes so razpršeni po knjižnicah in arhivih, včasih v tiskani, včasih v elektronski obliki. Vsi priročniki (še) niso digitalizirani in nekateri so v precej slabem stanju v zaprašenih zbirkah, ki so le redko uporabljane. Zato je nujno, da jih preučujemo tudi v prihodnosti in jih na ta način ohranjamo v zavesti Slovencev.

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SUMMARY

ENGLISH DICTIONARIES AND REFERENCE BOOKS FOR SLOVENIAN IMMIGRANTS TO THE UNITED STATES, 1895–1919
Marjeta Vrbinc, Donna M. T. Cr. Farina, Alenka Vrbinc

This article first presents a historical sketch of Slovenian immigration to the United States until World War I. Slovenian immigration is part of the mass turn of twentieth-century emigration, especially from central and southern Europe. From 1905 until World War I, a significant number of Slovenians arrived in the United States. Although it is impossible to determine exact numbers, the years 1902 to 1903, 1905 to 1907, and 1913 saw the largest numbers of Slovenian immigrants arriving in North America. The Slovenian arrivals were, by and large, farmers, but very few could continue farming in the new country. Most newcomers moved into other occupations and began working in mines or quarries, on railways, as masons, longshoremen, and lumbermen, or in iron- and steel-working. They settled mostly but not solely in the Midwest and Northeast, the largest concentration of Slovenians being in Cleveland, Ohio. The second part of the article focuses on six reference books created to meet the needs of Slovenian-American immigrants. The analysis of these books, published from 1895 to 1919, emphasizes the macrostructure, but occasionally, some parsimonious remarks about the microstructure are also included. These books played an important role not only in learning English but also in acculturating to the United States; examining them sheds light on the nature of the reference books and the immigrant world in which they were created. While some of these reference works are Slovenian–English and/or English–Slovenian dictionaries, others are grammar books or guides to basic conversation and acclimatization to American life. The study investigates what types of information were available to Slovenian immigrants in these books; for example, explanations of English pronunciation and grammar, useful everyday phrases, instructions for naturalization, explanations of names and values of US coins and bills, and various advertisements. Some of the books investigated are relatively standard-type print dictionaries (Kern, 1919 and Košutnik, 1912) that look familiar to the modern eye; others are more hybrid works (Kubelka 1904, 1912a, and 1912b) that aimed to meet the needs of the time and were not concerned with following specific scholarly models. On the other hand, Jeram's (1895) non-dictionary grammar, while apparently following prevailing language-learning models popular at the time, may have been rather mysterious to the mostly uneducated Slovenian immigrants who used it; it certainly does not contain exercises of the type that we give to language learners today. All in all, these and other reference works helped Slovenian immigrants to acquire English with relative speed and facility.

COMMUNICATION RELATIONS ON TWITTER DURING THE MIGRANT "CRISIS" IN SLOVENIA

Rok Smrdelj[I]

ABSTRACT

Communication Relations on Twitter During the Migrant "Crisis" in Slovenia
The article explores communication relations on Twitter during the 2015–2016 migrant "crisis" in Slovenia. By integrating social network analysis with critical discourse studies, the author finds that the "left-wing" political network had the most members. In contrast, the "right-wing" political network was notably more influential and active. The political elite, mass media, journalists, and public figures are among the most influential users. A vast majority of posts feature discriminatory discourse focused on security understandings of migration. The research is important because it provides one of the few and relatively comprehensive insights into the online digital discussion on migration in Slovenia.
KEYWORDS: migrant "crisis", Twitter, social network analysis, critical discourse studies, "right-wing" actors

IZVLEČEK

Komunikacijska razmerja na Twitterju v obdobju migrantske »krize« v Sloveniji
Avtor v članku proučuje komunikacijska razmerja na Twitterju v obdobju migrantske »krize« 2015–2016 v Sloveniji. Izhajajoč iz analize socialnih omrežij in kritičnih študijev diskurza ugotavlja, da ima omrežje, ki predstavlja »levo« politično opcijo, največ članov, »desno« politično omrežje pa je bilo najvplivnejše in najdejavnejše. Med najvplivnejšimi uporabniki omrežja so politična elita, množični mediji, novinarji in javno znane osebe. Večina objav vsebuje diskriminatorni diskurz s poudarkom na varnostnem razumevanju migracij. Raziskava je pomembna zato, ker gre za enega redkih in razmeroma celovitih vpogledov v digitalno spletno migracijsko razpravo v Sloveniji.
KLJUČNE BESEDE: migrantska »kriza«, Twitter, analiza socialnih omrežij, kritični študiji diskurza, »desno« usmerjeni akterji

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MIGRATIONS IN ONLINE MEDIA

"Migration in the media" and "media in migration" are two distinct research subfields within the broader field of media and migration studies (Wood & King, 2001; Smets et al., 2019). While the first subfield delves into media representations of migrants in mass and social media, the second subfield investigates the role of new media technologies in the migration process. Research in the "migration in the media" subfield predominantly reveals that contemporary media portray migrants as "others," "criminals," and "undesirables" (Wood & King, 2001; Consterdine, 2018; Eberl et al., 2018). On the other hand, findings from the "media in migration" subfield underscore the dual role of new media technologies, such as smartphones, in migration. They provide migrants with travel information but also track their whereabouts, movements, and interactions with others, thereby rendering them vulnerable to government surveillance (Zavratnik & Cukut Krilić, 2020).

"Migration in the media" studies reveal that mass and social media significantly shape citizens' perspectives on migration issues, as the majority of European citizens lack direct contact with migrants and rely on media-mediated content as their primary source of information (Consterdine, 2018; Eberl et al., 2018). To illustrate, Kogovšek Šalamon & Bajt (2016, p. 9) stated that had the media not reported on the 2015–2016 migrant "crisis," most of the population would have remained unaware of the migrants' arrival in Slovenia. Such observation underscores the importance of examining migration through the analysis of media content. It also indicates that media discourse, although not entirely detached from political discourse, strongly influences attitudes toward marginalized groups (Jalušič, 2001: 14) such as migrants.

The "migration in the media" subfield can be further subdivided based on the media studied: online or offline. While studies of migration in offline media are abundant, studies addressing migration in online media—including both mass and social media—are scarcer (Eberl et al., 2018; Smrdelj, 2021).

MIGRANT "CRISIS" ON TWITTER IN SLOVENIA

Situated in the "migration in online media" subfield, our study delves into the communication relations on Twitter during the 2015–2016 migrant "crisis"[1] in Slovenia. The phrase migrant "crisis" is a widely established media and political label for the enormous number of migrants arriving in Europe during the second half of 2015 and the beginning of 2016. A majority of these migrants originated from Syria,

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1   We use the term "crisis" in quotation marks to distinguish our perspective from the media's and political depiction of the unprecedented number of migrants arriving in Europe as a "crisis." Situations deemed social crises are not necessarily genuine crises in all instances. Instead, they can be framed and constructed as such by both the media and political elites (Vezovnik, 2018; Smrdelj & Vogrinc, 2020).

Afghanistan, Iraq, and their neighboring countries (Government of the Republic of Slovenia, 2016; Eurostat, 2019). War, poverty, and political upheaval triggered significant migration from these regions (Kogovšek Šalamon & Bajt, 2016). With Hungary closing its borders on October 17, 2015, Slovenia became a transit country for all migrants aiming for Germany or other northern or western European countries. After the closure of the Hungarian border, the so-called "Balkan route" was realigned, shifting from the trajectory of Serbia-Hungary-Austria-Germany to that of Serbia-Croatia-Slovenia-Austria (Malešič, 2017, p. 953).

Our article uses the term "migrant" to encompass all individuals who crossed borders to arrive in Europe during the migrant "crisis," irrespective of the reasons for leaving their home country. We follow the International Organization for Migration's definition of "migrant" as anyone who "moves away from his or her place of usual residence, whether within a country or across an international border, temporarily or permanently, and for a variety of reasons" (IOM, 2019). Given the expansive nature of the IOM definition, "migrant" can be aptly applied to numerous categories of individuals who reached Slovenia during the "crisis," whether they were merely transiting Slovenia or actively seeking asylum in the country.

Our study focuses on the Twitter debate between September and December 2015. This timeframe marks when most migrants arrived in Slovenia (Government of the Republic of Slovenia, 2016), and migration was most prominently highlighted in both mass and social media (Smrdelj, 2021). By choosing Twitter as our analysis medium, we aim to bridge the existing research gap in studying online media within the "migration in the media" subfield. Twitter is important to study since it is more open to the public than Facebook (posts are accessible to unregistered users) and is used mostly for political discussions rather than social dynamics (Verweij, 2012, p. 682). Moreover, Twitter plays an important role in disseminating information during social crises (Bruns et al., 2012). Last but not least, Twitter, along with Facebook, was the first source of information during the tumultuous events related to the migrant "crisis" (Lecheler et al., 2019).

To understand who directed the Twitter debate unfolding during the migrant "crisis" in Slovenia, we will first review the studies on "migration in the media" on Twitter. We will define the importance of our study in this subfield. Then, the focus will shift to network theory, which provides categories for analyzing the communication dynamics between social media users. To explore migration discourses in the Twitter debate, we will supplement network theory with assumptions for studying migration discourse in the media. After the theoretical part, we will outline our research questions, describe the sample, and detail our data collection and analysis methodologies. After presenting the results, we will discuss the study's main insights.

MIGRATIONS ON TWITTER: A LITERATURE REVIEW

Twitter migration studies typically draw from network theory, operationalizing it in several ways: analyzing vast numbers of posts in different national languages (e.g., Gualda & Rebollo, 2016; Siapera et al., 2018); focusing on the meaning of specific hashtags in the discussion (Avraamidou et al., 2021; Barisione et al., 2019); conducting a qualitative analysis of a smaller sample of posts (Kreis, 2017); examining individual user profiles of representatives of parliamentary politics (Bennett, 2016); or addressing specific viral events, such as the death of the boy Alan Kurdi (e.g., Bozdağ & Smets, 2017).

Twitter migration studies reveal that humanitarian and security discourses predominantly shape the debates on the platform. As such, Twitter migration discourses mirror those typically present in the mass media (Consterdine, 2018; Eberl et al., 2018; Smrdelj, 2021). The most influential Twitter users include representatives from parliamentary politics, the mass media, and established NGO actors with online and offline influence (Ferra & Nguyen, 2017; Siapera et al., 2018). The activities of anti-immigrant movements that spread hateful and discriminatory attitudes on Twitter are very present (Avraamidou et al., 2021). Studies also indicate that most users have a "right-wing"[2] political orientation (Bennett, 2016; Froio & Ganesh, 2019; Avraamidou et al., 2021).

Our research stands out due to its unique approach to examining the migration debate in Slovenia, particularly through its expansive sample of tweets. We focus on the entire discussion and do not limit ourselves to specific user profiles or topics. Studies investigating migration discourse on Twitter target major world languages (e.g., English, French) and overlook smaller countries such as Slovenia (e.g., Gualda & Rebollo, 2016; Kreis, 2017; Siapera et al., 2018). A distinguishing methodological innovation of our study is its emphasis on the retweet network as a starting point for examining communication dynamics. Although several Twitter migration studies visualize the communication relations network (e.g., Siapera et al., 2018; Avraamidou et al., 2021), none focus directly on retweets. Instead, they use other data to create the network (e.g., hashtags, mentions, replies).

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2   Much like the term "crisis," we enclose the terms "right" and "left" in quotation marks. This is because we do not employ them as definitive analytical concepts; their meanings can shift depending on the socio-historical context, as detailed in the Discussion section of this article. Instead, our use of these two terms relies on self-identification. If a party or medium identifies as "right-wing" or is publicly perceived as such, we tentatively label it in that manner.

NETWORK THEORY

Within network theory (Himelboim, 2017; Schroeder, 2018; Hansen et al., 2020), we focus on three concepts: the network, central users, and network communities (Jesenšek et al., 2021). In the following sections, we will introduce each of these concepts.

Network

A network epitomizes the intricate web of connections among social media users. Unlike traditional communication, which follows a linear path from sender to receiver, online interactions are bidirectional. Social media participants function both as senders and receivers of content. This dual role leads to the emergence of complex communication interactions that can be visualized graphically as a network of "nodes" (users) and "edges" (relations between users). Various forms of social media communication, such as liking posts, retweeting, following users, mentioning users, commenting on posts, etc.), can represent these "edges" (Lindgren, 2017).

Central Users and Influence

Central users are distinguished from other social media users due to their distinct activity or influence (e.g., Xie & Luo, 2019; Jesenšek et al., 2021). For our study, we focused on those central users notable for their influence.[3] Nonetheless, defining and quantifying influence is not straightforward. To accomplish our research objective, we utilized a simple definition of influence as a particular user's ability to influence others' opinions on a specific topic (see Dang-Xuan et al., 2013; Al-Rawi, 2019). Accordingly, we measured Twitter influence through retweets, viewing them as markers of endorsement and engagement with a user or their content (Metaxas et al., 2021). The rationale is straightforward: the more a user or their tweet is retweeted, the greater its visibility and influence is over the direction of discussion on a particular topic. Thus, we categorize "most influential users" as those who are frequently retweeted, while "most influential tweets" are individual posts that garner significant retweets (e.g., Dang-Xuan et al., 2013; Al-Rawi, 2019; Jesenšek et al., 2021).

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3   For space reasons, we do not focus on users who stand out for their activity in the Twitter migration debate.

Network Communities: Network Fragmentation, Polarization and Pluralization

According to existing studies, social media can encourage the exchange of opinions between users with different ideological backgrounds (e.g., Bakshy et al., 2015; Guess et al., 2017; Arlt et al., 2019) or cause fragmented and polarized communities consisting of ideologically homogeneous users who communicate mainly with each other (e.g., Doğu, 2017; Dylko et al., 2017; Jesenšek et al., 2021). Based on these communication dynamics, the three most prevalent communication patterns in social media are "network fragmentation," "network polarization," and "network pluralization" (Jesenšek et al., 2021).

"Network fragmentation" denotes distinct user communities inside a particular network (Lindgren, 2017; Jesenšek et al., 2021). Typically, these communities are characterized by members sharing similar beliefs, leading them to communicate frequently amongst themselves. In contrast, they seldom engage with users from other communities with different opinions (Pariser, 2011). Hence, information sources aligning ideologically with the beliefs of these communities predominate in the debate (Barisione et al., 2019). Scholars use various terms (filter bubbles, echo chambers) to emphasize the uniformity of opinions and worldviews within these network communities and the close communication relations among their members (Pariser, 2011; Rasmussen, 2016). The visualization of the network, characterized by fragmentation into several communities, resembles a crowd in a public square divided into smaller, separate groups of people engaged in conversation (Barisione et al., 2019). When these individual "clusters" become apparent in graphical representation, it signifies the network's fragmentation and the existence of distinct communities (Rasmussen, 2016; Bruns & Highfield, 2018).

The term "network polarization" denotes pronounced opposing views on a specific topic among particular communities (Doğu, 2017; Dylko et al., 2017). To ascertain whether a fragmented network is also polarized, we must analyze the discourse within its communities to discover if they hold similar or opposing opinions on a particular topic (Barisione et al., 2019).

Moreover, "network pluralization" refers to the circulation of diverse viewpoints amongst ideologically heterogeneous users who are not "closed" into ideologically homogeneous communities. Consequently, "network pluralization" is depicted graphically as conversations among ideologically different users who are not clustered into individual communities but are dispersed throughout the network (Garrett et al., 2011; Arlt et al., 2019).

MIGRATION DISCOURSES IN THE LIGHT OF THE MEDIA CONSTRUCTION OF THE "CRISIS"

Drawing from existing studies (see Consterdine, 2018; Eberl et al., 2018; Smets et al., 2019; Smrdelj, 2021), we can determine some general features of the migration discourse[4] in light of the media's construction of the "crisis." The most important feature is the depiction of as "others" in relation to the "dominant" society, i.e., the citizens of the recipient countries. The construction of migrants' "otherness" is predicated on their unfavorable and stereotypical portrayal and serves to justify their rejection and non-acceptance in the host countries.

The security and criminalization discourse are the two most prevalent types of negative, stereotypical portrayals of migrants in the media. Within the security discourse, migrants are portrayed as cultural and physical threats to their host countries. The criminalization discourse depicts migrants as criminals for illegally crossing the border or their alleged involvement in crimes, such as theft, public disturbances, and selling drugs (Smrdelj, 2021). The security discourse, complemented by the rhetoric of exceptional circumstances, the criminalization discourse, and the construction of an impending threat and risk, creates the "securitization of migration," which is the predominant way of understanding migration in the contemporary world (Malešič, 2017; Vezovnik, 2018).

While negative and stereotypical depictions of migrants dominate contemporary media (Smrdelj, 2021), some studies, such as by Šarić & Felberg (2019), highlight media attempts to overcome these negative stereotypes. They reflect on the phenomenon of migration beyond racist and discriminatory assumptions about their arrival, embracing what is termed anti-discrimination discourses. A prime example of such positive discourse is the humanitarian approach, which often paints migrants as victims of war, deserving of support rather than being framed as cultural or physical threats. However, even though humanitarian discourse is considered an example of positive treatment of migrants, it may also be stereotyped and perpetuate power relations. It can portray migrants as helpless and mute victims who are discussed by others, be it journalists, politicians, police, or NGO representatives (Smrdelj & Vogrinc, 2020).

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4   As we will explain in the methodology section, we follow Fairclough (1992, pp. 63–64), who defines discourse as a form of social practice. This refers not only to the forms of action of individuals, but also to the forms of representations. Therefore, we perceive discourse as an assortment of representation modalities pertaining to a particular topic, focusing on the portrayal of social power relations dynamics within a given text.

METHODOLOGICAL FRAMEWORK

Based on the theoretical foundation outlined above, our study poses the primary research question (RQ 1): Who dominated the Slovenian migrant "crisis" Twitter debate, and in what manner? To comprehensively address this, we have formulated the subsequent sub-questions:

- SQ 1.1: Is it possible to identify communities in the retweet network? How extensive are these communities in terms of the number of users and communication relations among them? What communication patterns emerge at the level of visualization of identified communities?

If we discover distinct communities in the retweet network, we will also answer the following questions for each community:

- SQ 1.2: Who are the most influential users?

- SQ 1.3: Which sources of information predominate?

- SQ 1.4: Which migratory discourses prevail?

The sample on which we built the retweet network consists of 3,103 users who generated 35,543 tweets (of which 13,189 were retweets) between September 1 and December 31, 2015. This was the period when the number of migrants arriving in Slovenia reached its peak, and public debates were most intense. We obtained the data on April 25, 2021, using the Twitter API via Academic Research Access, a collaboration undertaken with Uroš Godnov, PhD, from the Institute for Data Quality (Slovenian: Inštitut za kakovost podatkov, d.o.o.). All Slovenian posts with at least one of the following hashtags and/or words or root words were included in the sample: "#begunci", "#migranti", "#begunskakriza", "#migrantskakriza", "#ilegalnimigranti", "#ilegalci", "#prebežniki", "#ŽičnaOgraja", "begun-", "migra-", "prebežni-", "ilegal-", in "azil".

To construct and analyze the retweet network, we utilized social network analysis (SNA). This method enabled us to determine which users were actively engaging in the network and with whom they forged communication relations (Himelboim, 2017; Hansen et al., 2020). Our approach to creating and analyzing the retweet network was guided by the methodologies set forth by Jesenšek et al. (2021) and Al-Rawi (2019). A more comprehensive description of the SNA methodology, accompanied by the results of our analysis, is described in the subsequent section.

We adopted a methodological amalgamation of SNA and critical discourse studies (CDS) (Krzyżanowski & Machin, 2017). CDS provides a well-established interdisciplinary perspective for studying public discourses. Central to CDS is investigating how language legitimizes unequal social relations between "dominant" and "minority" society. In our particular case, we examine the social relations between the "dominant" society—the citizens of the host countries—and the "minority"

society—the migrants. Our discourse analysis is primarily concerned with how language both establishes and legitimizes these social relationships and, conversely, how it attempts to expose and deconstruct them. Our understanding of CDS closely resonates with Fairclough's dialectical-relational approach (1992). He postulated that media texts do not only reflect or represent social relations and entities but also simultaneously construct and constitute them (Fairclough, 1992, p. 3). Therefore, power relations are invariably interwoven within a particular discourse, such as humanitarian discourse. These discourses often legitimize hierarchies through ideological mechanisms, and the CDS seeks to reveal these mechanisms (Smrdelj & Pajnik, 2022).

In conducting the discourse analysis, we closely examined the tweets to discern their framing of the acceptance or rejection of migrants based on prevailing migration discourses in light of the media construction of the "crisis" presented above.

The combination of quantitative (SNA) and qualitative (CDS) methodological approaches grants us a holistic understanding of the characteristics of the retweet network and the communities within it.

RESULTS OF THE ANALYSIS

Visualization of the Retweet Network

We constructed the retweet network based on the "from–to" principle. Here, "from" denotes the user who posted the original tweet, while "to" signifies the user who retweeted it. In this network, the "nodes" represent users, and the "edges" correspond to retweets.

Using R, we selected all users involved in the retweeting process, encompassing both the original authors whose posts were retweeted and those who actively retweeted posts by other users. We obtained 2,051 users and 13,189 retweets. Each retweet is considered an "edge." Thus, our network comprises 13,189 "edges." Upon importing these data into Gephi,[5] we determined 8,449 "unique edges" (Hansen et al., 2020) between users. To clarify, a "unique edge" signifies a singular connection between two users, irrespective of the frequency of retweets between them. For example, if User A retweeted User B's post five times, this translates to five retweets, or five "edges." However, in terms of "unique edges," this interaction is singular, so it counts as only one "unique edge." Therefore, the figure "13,189" quantifies the number of "edges" corresponding to the sum of all retweets. At the same time, "8,449" denotes the number of "unique edges," which served as the foundation for our network visualization in Gephi.

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5   Luka Jesenšek helped us visualize the retweet network and identify communities using the Louvain algorithm in Gephi.

Having discerned the "unique edges," we used the Louvain algorithm[6] to ascertain the possibility of identifying communities within the retweet network. This algorithm identified forty-six communities. However, a majority of these communities were deemed insignificant due to their minuscule size (e.g., just two). Therefore, our focus narrowed to the six largest communities, encompassing 92% of all users. The attributes of each of these communities within the retweet network are delineated below in Table 1.

Communities	Number of retweets	Number of "unique edges"	Number of users
Community 1	3,372	2,315	769 (38 %)
Community 2	6,292	3,493	484 (24 %)
Community 3	1,194	937	254 (12 %)
Community 4	720	440	152 (7 %)
Community 5	711	524	126 (6 %)
Community 6	591	460	99 (5 %)
Communities 7–46	309	280	167 (8 %)
Total	13,189	8,449	2,051

Table 1: Communities in the retweet network (source: own analysis).

We determined the size of each community based on the number of users, as presented in the last column of Table 1). In Table 2, the second column shows the number of retweets generated by users in a given community, while the third column summarizes the number of "unique edges." The penultimate row of Table 1 summarizes the attributes of the remaining forty communities.

Comparing the characteristics of the six largest communities, it is evident that a larger user base within a community typically corresponds to an increased number of retweets. The exceptions are the first and the second largest communities. The second community has 285 fewer users than the first, but its users generated nearly twice as many retweets as the first community's users. In addition, the users of the second community generated the most retweets.

Finally, we visualized the retweet network of the six largest communities in the Gephi (Figure 1). The retweet network has 1,884 edges (users) and 8,169 nodes ("unique edges").

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6   The Louvain algorithm developed by Blondel et al. (2008) is based on the discovery of common communication relations among network users. Users who frequently interact are categorized within the same community. Users belonging to a particular community also communicate with users from different communities, but communication among members of the same community occurs more frequently.

Figure 1: Visualization of the network of the six largest communities (source: own analysis).

Figure 1 visualizes distinct communities, each designated with a unique number and color: Community 1 is purple, Community 2 is green, Community 3 is blue, Community 4 is black, Community 5 is orange, and Community 6 is pink. Users who communicate more frequently are clustered, whereas those with fewer interactions are spaced farther apart.

Figure 1 illustrates fragmentation into individual communities. Communities 1 and 2 are particularly evident, situated at opposite ends of the network, with Community 1 on the left and Community 2 on the right. The network visualization also reveals that the users of these two communities do not communicate with one another, as evidenced by the absence of purple in the green-dominated area of Community 2 and vice versa. However, Community 2, the most isolated from the other communities, clearly exemplifies network fragmentation. It is depicted as a dense cluster of green "nodes," much denser than other communities' "nodes." In addition, users from other communities are not seen in the cluster of green "nodes," unlike in Community 1, where other-colored nodes can be found among the purple "nodes." This visual representation indicates that Community 2 members predominantly interact with each other and rarely branch out to converse with members from other communities (the closest to them are users from Community 6, pink color). Despite its isolation, Community 2 generated the highest number of retweets.

On the other hand, users from different communities often communicate with those from other communities, leading to what we can term "network pluralization." Figure 1 illustrates how the colors of Communities 1, 3, 4, 5, and 6 intertwined in some locations. For instance, blue "nodes" (representing Community 3) appear in regions dominated by orange "nodes" (from Community 5) and black "nodes" (from Community 4).

Individual Communities' Characteristics in the Retweet Network

Network visualization enables us to assess user communication patterns. As previously mentioned, we can observe both network fragmentation and pluralization simultaneously. To provide insight into the interactions within each community, we identified the ten most influential users, the dominant sources of information regarding "migrant" crisis events, and the prevalent discourses of the most retweeted tweets (Table 2).

The most influential users are those whose tweets received the most "unique edges," meaning they received the most retweets from distinct users. These users are listed in the third row of Table 2. We named each community based on the top ten most influential users identified within that community. In the fourth row of Table 2, the dominant information sources were selected based on the five most retweeted links and hashtags within each community. For instance, if "delo.si" ranked among the top five most-retweeted links of a community, we concluded that *Delo* newspaper's content was the most popular within that community. The final row of Table 2 lists each community's dominant discourses based on discourse analysis of the five most-retweeted tweets. We separately analyzed each of the top five most-retweeted tweets and, through this analysis, assessed the prevailing discourse shaping the migration debate in that community.[7]

Community 1 consists of numerous public figures who form a "left-wing" network that critiques migrants' stereotypical portrayal. Notably, this community lacks representatives from the parliamentary political "left." Community 2 is emblematic of the SDP, the largest "right-wing" opposition party at the time. Prominent figures from this party, such as SDP leader Janez Janša and MPs Vinko Gorenak and Žan Mahnič, are key members. Community 3 refers to the network of the television station POP TV. The majority of its members were journalists from the station during that period, including Tjaša Slokar, Irena Joveva, Jure Tepina, Anže Božič, and Nika Kunaver. Community 4 consists of anonymous users. Determining the real identities behind these profiles is challenging, suggesting they might represent a "fake public" or perhaps just "ordinary" citizens. Community 5 is dominated by users connected with the then-ruling party MCP, such as the then-Prime Minister Miro Cerar and the *Večer* newspaper. Key figures from the newspaper include its former editor, Katja Šeruga, and journalists Urška Mlinarič, Vojislav Bercko, and Aleš Kocjan. Community 6 includes users related to the NSi party, such as Žiga Turk and Federico V. Potočnik.

Representatives of both the parliamentary political elite and the mass media are present in every community, except for Community 4, where neither politicians nor mass media representatives are present. The prominence of politicians as influential

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7   Due to space constraints and the complexity of the data, we do not list the most retweeted links, hashtags, and tweets for each community. Instead, we have provided a summarized overview of the results in Table 2. The data underlying the analysis are summarized in more detail in the author's doctoral dissertation (Smrdelj, 2022).

	Community 1	Community 2	Community 3	Community 4	Community 5	Community 6
Network name	Users representing a "left-wing" political network	Slovenian Democratic Party (SDP)	POP TV television station	Publicly unknown users	Modern Centre Party (MCP) and Večer newspaper	New Slovenia – Christian Democrats party (NSi)
The most influential users	@matjasec (101) @Delo (100) @STA_novice (92) @SafetAllibeg (74) @ZerjavicDelo (64) @FranciKek (54) @petrasovdat (53) @Pizama (49) @borutmekina (47) @Meli_SI (45)	@Nova24TV (121) @RevijaReporter (119) @JlansaSDS (117) @JozeBiscak (104) @strankaSDS (101) @DamirCrncec (93) @drVinkoGorenak (84) @BojanPozar (78) @ZanMahnic (71) @krtmen (66)	@24ur_com (151) @policija_si (91) @SiolNEWS (70) @srdjan_c (42) @TjasaSlokar (41) @Jloveva (38) @juretepina (37) @AnzeBozic (34) @NikaKunaver (32) @Zurnal_24 (31)	@skyslovenia (43) @Centrifuzja (28) @MatjazJazbar (28) @brane_si (22) @RSustar (19) @slovenistan (17) @cashkee (17) @zaslovenijo2 (15) @Dr_Eclectic (14) @stavenskovrhsk1 (11)	@vladaRS (137) @vecer (77) @UrskaMlinaric (36) @Slovenskavojska (36) @VojislavBercko (35) @KatjaSeruga (26) @MiroCerar (25) @EKvSloveniji (20) @StrankaSMC (13) @a_kocjan (13)	@Domovina_je (65) @ZigaTurk (43) @AntonTomazic (40) @FVPotocnik (39) @BCestnik (30) @steinbuch (24) @NovaSlovenija (21) @RadioOgnjisce (19) @Andr3jaL (17) @MladaSlovenija (15)
Dominant information sources	Delo, STA, Finance, Radio Študent	Reporter, Nova24TV, Demokracija	24ur.com, siol.net, Delo, RTV Slovenija, Epilog	Reporter, Delo	Večer, Delo	Domovina, Reporter, RTV Slovenija
Dominant migration discourses	Attempts to overcome negative stereotypes, anti-discrimination discourses	Security discourse, reinforcement of negative stereotypes about migrants	Positive and negative discourses about migrants	Positive and negative discourses about migrants	Positive and negative discourses about migrants	Security discourse, reinforcement of negative stereotypes about migrants

Table 2: Characteristics of the six largest retweet network communities (source: own analysis).

users is especially noticeable in Communities 2, 5, and 6. Community 3 has the highest concentration of media-affiliated users, predominantly from the network of the television station POP TV.

From the discursive analysis of the most retweeted tweets, we find that different discourses about migrants prevail in each community. This network fragmentation, most evident in Figure 1 for Communities 1 and 2, also manifests in the dominant discourses of both communities, leading us to describe their dynamics as polarized. While the most retweeted tweets in Community 1 are characterized by efforts to counter negative stereotypes about migrants, the most retweeted tweets in Community 2 are characterized by a discriminatory discourse.

Community 2, representing the SDP party network, generated the most retweets. However, it remains notably isolated from other communities. Visually, it is closest to Community 6, representing the NSi Party network. Both Community 2 and Community 6 predominantly feature retweets related to security discourse. In contrast, Communities 3, 4, and 5 display varied discourses, suggesting the presence of ideologically heterogeneous users.

In all six communities, Slovenian mass media are the predominant sources of information, with foreign sources not being retweeted at all. There are no "alternative" sources of information, such as websites of NGOs focusing on migrants. Regarding political orientation, "right-wing" media (the weekly *Reporter*, the television station Nova24TV, the weekly *Demokracija*, the online portal *Domovina*) predominate, mainly in Communities 2 and 6. "Left-wing" media, such as the weekly *Mladina*, do not feature prominently in retweets. In terms of ownership, the landscape is dominated by private commercial media, while non-commercial outlets, such as RTV Slovenia and Radio Študent, are less presented. The latter occurs only in Community 1.

DISCUSSION

In our study, we sought to discern who dominated the Slovenian migrant "crisis" Twitter debate and how they did so. We discovered six major communities, encompassing 92% of all users in our sample. Community 1 is populated largely by public figures from a "left-wing" network that criticizes the stereotypical portrayal of migrants. Community 2 is representative of the SDP, the largest "right-wing" opposition party at the time. Community 3 is associated with the television station POP TV. Community 4 consists of publicly unknown users. Community 5 predominantly comprises users associated with the then-ruling MCP party and the *Večer* newspaper. Community 6 consists of users aligned with the NSi party. Community 2 is distinct; it generates the most retweets, and its users are the most isolated compared to other communities (RQ 1).

From the network visualization of the six largest communities, we discovered the coexistence of "network fragmentation" (most clearly exemplified in the case of Community 2), "network polarization" (most distinctive between Communities 1 and 2), and "network pluralization" (present across Community 1, 3, 4, 5, and 6 where ideologically different users communicate with each other) (SQ 1.1). The most influential users are representatives of the parliamentary political elite, such as MPs, party leaders, and the prime minister, as well as figures from the mass media, such as journalists, editors, and media institutions (SQ 1.2). Slovenian mass media are dominant sources of information regarding "migrant" crisis events (SQ 1.3). While there are efforts to counter negative and stereotypical portrayals of migrants, a discriminatory discourse emphasizing a security-centric perspective on migration proves more pervasive in Twitter debates (SQ 1.4).

Our study offers one of the few comprehensive insights into the online digital discussion on migration in Slovenia. While the Slovenian migration discourse on Twitter mirrors those in other European contexts in terms of dominant users and narratives (e.g., Ferra & Nguyen, 2017; Siapera et al., 2018), our research distinctively underscores how "right-wing" political networks instrumentalize the migration debate. Conversely, representatives of the "left-wing" parliamentary political elite, such as the then United Left party,[8] as well as NGOs, scholars, and other representatives of the "weak public," are not among the most influential users. Although some studies demonstrate the appropriation of the online digital environment by the "right-wing" political network (e.g., Bennett, 2016; Froio & Ganesh, 2019; Avraamidou et al., 2021), its dominance is markedly pronounced in our findings. This is primarily due to the notable absence of the aforementioned social groups.

The dominance of the "right-wing" political network, coupled with the diminished presence of the parliamentary "left" and other social groups offering "alternative" interpretations of the migrant situation beyond "party" lines (e.g., NGOs) (Luthar, 2017), can be attributed to structural shifts in parliamentary politics over recent decades. The "right-wing" political agenda is normalizing and becoming the center of legitimate public debate in parliamentary politics, concurrently sidelining the "left-wing" perspective. This shift becomes evident when we consider that what was once deemed "social democratic" discourse a few decades ago—advocacy for public health care, public education, labor rights, and fundamental human rights—is now labeled as "radical," "socialist," or "communist," particularly by "right-wing" protagonists. The merging of social democratic discourse with the neoliberal "right-wing" agenda and the symbolic appropriation of "left-wing" narratives by "right-wing" entities both accelerate the mainstream acceptance of the "right-wing" agenda and the sidelining of "left-wing" agenda (Dolar, 2021). Consequently, the "right-wing" and neoliberal agenda becomes dominant in parliamentary politics, while the "left-wing"

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8   Although the MCP party identifies as "center-left," we do not consider it a typical "left-wing" party, given its pursuit of the neoliberal agenda during its tenure in government.

agenda finds itself more aligned with civil society, particularly within the non-governmental sector.

The marginalization of "left-wing" parliamentary politics is mirrored in the Twitter migrant debate, with "left-wing" politicians and NGOs absent from the ranks of the most influential users. Instead, public figures from Community 1 have assumed a "symbolic" stance representing the "left" political perspective. This underscores how the migration debate on Twitter is emblematic of a broader structural shift in parliamentary politics, one which negatively impacts public discourse by largely confining the debate to the perspectives of the "right-wing" actors.

The prominence of right-wing actors can, in part, be attributed to the inherent media logic of Twitter, which is characterized by the brevity of tweets. As postings are limited in character count, this type of communication does not facilitate an argumentative and comprehensive discussion of a particular topic. Instead, it becomes a fertile ground for the dissemination of anti-immigrant views, which can be conveyed succinctly, a feature typically associated with the "right-wing" political stance and the "right-wing" oriented media (Pušnik, 2017). Representatives of the "right-wing" political network adeptly harness Twitter's media logic to further their political goals. In contrast, other social groups, such as NGOs, do not participate in the discussion as Twitter's media logic does not afford them an equitable opportunity to communicate their perspectives. By narrowing the debate to the positions and views on migration held by a "right-wing" political network, Twitter's media logic has negative consequences for the contemporary online public sphere (Fuchs, 2021).

Consequently, the dominance of "right-wing" actors coincides with the dominance of a discriminatory discourse centered on the security viewpoint of migration. Bigo (2005) notes that globally exposed events such as the September 11, 2001, attacks in the United States contributed to the general understanding of migration as a security issue. This indicates that the "right-wing" political stance in Slovenia has simply adopted the "global" and well-established biased perspective on migration.

Mass media representatives, including journalists, editors, and media institutions, also stand out in the retweet network. Mass media's dominance among the most influential users and major information sources suggests its "older" logic has adeptly harnessed social media's "newer" logic to disseminate its content. This suggests that "older" mass media remain the key agenda-setters on Twitter.

While interpreting the results of our studies, some limitations must be acknowledged. In some communities, the relationship between shared media content and community members is evident (e.g., in Community 2, representing the SDP party, the predominance of "right-wing" media content is anticipated). However, in some other communities, the rationale behind specific retweeting patterns remains elusive (e.g., why users associated with the *Večer* newspaper and those representing the Slovenian government are clustered in the same community). In such cases, where the connection between users and media content is not immediately apparent, we need more quantitative and qualitative data for a robust retweet network

analysis. Thus, delving deeper into communication patterns within specific communities and examining interactions between users across different communities is an essential next stage in the research process.

CONCLUSION

In this article, we examined communication dynamics on Twitter during the 2015–2016 migrant "crisis" in Slovenia. By merging social network analysis and critical discourse studies, we discerned that while the "left-wing" political network boasted the largest membership, the "right-wing" political network was the most influential and active, as its members generated the most posts. Notably, the political elite, mass media, journalists, and public figures emerged as the most influential users. Slovenian mass media stood out as a predominant source of information regarding the migrant "crisis" events. The vast majority of posts feature discriminatory discourse, leaning heavily toward security-centric interpretations of migration. The significance of our study lies in its provision of a nuanced, in-depth exploration of the online discourse surrounding migration in Slovenia, an area previously under-researched.

Following the onset of the SARS-CoV-2 outbreak and the subsequent change in government in March 2020, Twitter activity in Slovenia increased significantly (Evkoski et al., 2021). Given this shift, future investigations could pivot toward more contemporary topics, such as Ukrainian refugees in the context of the ongoing Russia-Ukraine war, to examine potential changes in debate structure relative to the migrant "crisis" discourse in Slovenia. Moreover, the next research step should be to supplement the social network analysis by conducting interviews and focus groups to investigate why representatives of the parliamentary political "left" and NGOs are not more organized participants in the Twitter discussion.

ACKNOWLEDGMENTS AND ADDITIONAL INFORMATION

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POVZETEK

KOMUNIKACIJSKA RAZMERJA NA TWITTERJU V OBDOBJU MIGRANTSKE »KRIZE« V SLOVENIJI
Rok Smrdelj

Avtor v članku proučuje komunikacijska razmerja na Twitterju v obdobju migrantske »krize« 2015–2016 v Sloveniji. Izhajajoč iz metod za analizo socialnih omrežij, ki jih dopolnjuje s kritičnimi študiji diskurza, ugotavlja, da v omrežju poobjav oz. retvitov obstaja šest večjih skupnosti. Skupnost 1 sestavljajo različne javne osebe, za katere je mogoče reči, da predstavljajo »levo« usmerjeno omrežje, ki je kritično do negativnega in enoznačnega opisovanja migrantov. Skupnost 2 je omrežje stranke SDS. Skupnost 3 se nanaša na omrežje televizijske hiše POP TV, Skupnost 4 pa zajema javnosti neznane uporabnike. V Skupnosti 5 prevladujejo uporabniki, povezani s takratno vladno stranko SMC in dnevnikom Večer. V Skupnosti 6 pa najdemo uporabnike, povezane s politično stranko NSi. Analiza je pokazala, da je »levo« politično omrežje najštevilčnejše, vendar pa je »desno« politično omrežje najvplivnejše in najdejavnejše, saj so njegovi člani objavili največ retvitov.

Med najvplivnejšimi uporabniki prevladujejo predstavniki parlamentarne politične elite, kot so poslanci, predsedniki političnih strank in predsednik vlade, ter množičnih medijev, kot so novinarji, uredniki in medijske institucije. Prevladujoči viri informiranja o dogajanju v povezavi z migrantsko »krizo« so slovenski množični mediji. Čeprav se v nekaterih skupnostih pojavljajo poskusi vzpostavitve protidiskriminatornega migracijskega diskurza, pa je v splošnem bolj viralen diskriminatorni diskurz s poudarkom na varnostnem razumevanju migracij.

Raziskava je eden redkih razmeroma celovitih vpogledov v digitalno spletno razpravo na temo migracij v Sloveniji. Čeprav se slovenska razprava o migracijah na Twitterju v splošnem ne razlikuje od podobnih razprav v drugih nacionalnih okoljih v Evropi, pa je posebnost raziskave v tem, da za analizo omrežja retvitov zelo jasno pokaže, da migracijsko razpravo instrumentalizirajo uporabniki, povezani z »desnim« političnim omrežjem, predstavniki »leve« parlamentarne politične elite (na primer takratna stranka Združena levica) pa niso med najvplivnejšimi uporabniki. Prav tako umanjkajo NVO, strokovnjaki in drugi predstavniki »šibke javnosti«. Avtor navedeno ugotovitev tematizira v kontekstu širših strukturnih premikov na področju parlamentarne politike, kjer smo v zadnjih nekaj desetletjih priča vse večji normalizaciji »desne« in marginalizaciji »leve« politične agende. Pomemben »strukturni« pogoj za prevlado »desnice« je tudi medijska logika Twitterja. Zaradi kratkosti objav Twitter ne omogoča argumentirane in izčrpne razprave na posamezno temo. Namesto tega je ugoden teren za širjenje protipriseljenskih diskriminatornih stališč, ki so v splošnem značilna za »desno« politično opcijo in »desno« usmerjene medije, ta forma pa ni primerna za kompleksno in argumentirano razpravo, ki bi jo lahko zagotovile v razpravi manjkajoče družbene skupine.

POSTMIGRACIJSKA ESTETIKA: AVTOFIKCIJSKO NARATIVNO DELOVANJE V PISANJU DIJANE MATKOVIĆ IN VIZUALNEM USTVARJANJU ANNE EHRENSTEIN

Katja Kobolt[I]

IZVLEČEK

Postmigracijska estetika: Avtofikcijsko narativno delovanje v pisanju Dijane Matković in vizualnem ustvarjanju Anne Ehrenstein

Pričujoče besedilo osvetli postmigracijsko estetiko skozi prizmo koncepta »postmigracije« in analizo avtofikcijskih pristopov, posebej pripovednega delovanja (angl. narrative agency), v romanu Zakaj ne pišem (2021) avtorice Dijane Matković in v izbranih vizualnih delih umetnice Anne Ehrenstein. S predlogom pojma »metapripovedne nadidentifikacije« kot kritičnega poistovetenja z od zunaj vsiljenimi kategorijami besedilo pokaže, kako avtorici skozi pripovedno delovanje kritizirata družbeno konstrukcijo »pristnosti« in s tem produkcijo družbenih razlik ter artikulirata odpor proti hegemonialni dihotomni predstavi družbe, zaradi katere nekateri vsled razreda, kraja rojstva (staršev), etnije, narodnosti, rase in spola »pripadamo«, drugi pa (p)ostanemo »tujci«.

KLJUČNE BESEDE: postmigracijska estetika, avtofikcija, pripovedno delovanje, metapripovedna nadidentifikacija, Dijana Matković, Anna Ehrenstein

ABSTRACT

Postmigration Aesthetics: Autofictional Metanarrative Agency in the Writing of Dijana Matković and the Visual Work of Anna Ehrenstein

The present text follows post-migrant aesthetics by utilizing the concept of "postmigration" and analyzing the autofictional, especially narrative agency, in the novel *Why Don't I Write* (2021) by Dijana Matković and selected visual works by artist Anna Ehrenstein. By proposing the notion of "metanarrative overidentification" as a critical identification with externally imposed categories, the text shows how the authors, through a critique of the social construction of "authenticity" and thus of the production of social differences, articulate resistance to the hegemonic dichotomous idea of society, which makes some "belong" by virtue of place of birth (of parents), class, ethnicity, nationality, race, and gender, while others remain "aliens."

Keywords: postmigration aesthetics, autofiction, narrative agency, metanarrative overidentification, Dijana Matković, Anna Ehrenstein

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UVOD: »TAKO JE OD NEKDAJ: OBČUTEK PRAVICE DO GLASU JE V KORELACIJI Z DRUŽBENO (NE)MOČJO POSAMEZNIKA.«[1]

»Problem tvoje pozicije,« je v enem od najinih večnih pogovorov o pisanju nenadoma rekel moj *bližnjik*, »je ta, da nisi ne eno ne drugo. Izhajaš iz revnih delavcev, ampak ne moreš reči, da si s svojim intelektualnim delom kakorkoli preskrbljena. Nisi priseljenka, ampak tudi Slovenka nisi,« pri čemer bi z naštevanjem, kdo vse nisem, lahko še nadaljeval, sem pozneje pomislila. »Kdo sploh si ti?« (Matković, 2021, str. 8)

Migrirati pomeni (tudi) pripovedovati zgodbe (Heidenreich et al., 2013). Zgodbe, ki odgovarjajo na vprašanja o motivih, krajih in načinih migracij v primernem jeziku, predvidenem znotraj zakonskega okvira migracijske politike države, v katero se zgodi (uspešna) migracija. V procesu, ki sledi migraciji, tako imenovani postmigraciji, se postavljanje vprašanj ne neha. Videz, ime, materni jezik, naglas, kraj rojstva, državljanstvo staršev, razred, način delovanja in komunikacije v vsakdanjem življenju ter podobno so dovolj za (lasten) sum o »nepripadanju«, za občutke in za označenost kot »drugi«. Katera vprašanja, kakšne zgodbe (lahko) to »drugost« presežejo? Kako povedati zgodbo, če ta ne ustreza vnaprej predvidenim šablonam, ki jih kljub postmigracijski živi realnosti vsiljujeta migracijska politika in družbena proizvodnja razlik znotraj hegemonske ureditve vladanja? Kako sploh govoriti, če prihajaš iz »manjšinske« skupine, ki se ji glas odreka? Ali če je, vse prevečkrat prav iz izobražene (praviloma liberalne) pozicije, cirkularno zanikan obstoj manjšin (najprej seveda razredno določenih), pa tudi bolj ali manj vsa manjšinska problematika, češ da je že presežena?[2] To so vprašanja, ki jih v romanu *Zakaj ne pišem* (2021) tematizira v Ljubljani živeča pisateljica, prevajalka in kulturna delavka Dijana Matković (r. 1984, Novo mesto, Slovenija), v vizualnih delih pa v Berlinu živeča umetnica Anna Ehrensein (r. 1993, Dortmund, Nemčija), ki je svoja dela predstavljala tudi že v Sloveniji.[3]

Pričujoče besedilo se s preučevanjem pripovednega delovanja v delih obeh avtoric obrne k postmigracijskim izkušnjam, kot jih v svojem avtofikcijskem romanu ubeseduje Dijana Matković in v svojih video in instalacijskih delih upodablja Anna Ehrensein. Ključne argumente za primerjalno analizo del obeh izbranih avtoric ponujajo načini njunega pripovednega delovanja (angl. *narrative agency*; Meretoja, 2022, str. 122–124).

Pripovedno delovanje bi lahko opredelili kot za znotraj dela udejanjeno produkcijo glasu in vidnosti (in hkrati tudi kot sled delovanja avtorske subjektivnosti). Sledeč komparativistki Hanni Meretoja je pripovedno delovanje »konstitutivni vidik našega delovanja, ko se, skozi naše delovanje in nedelovanje, poslužujemo pripovednih praks, ki ohranjajo in prevprašujejo družbene strukture« (Meretoja,

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1 Matković, 2021, str. 15

2 Raziskovalka postmigracijske družbe Naika Foroutan (2015) to imenuje »obramba reakcija«.

3 Anna Ehrenstein se je leta 2019 predstavila na razstavi »Eat This!« v celjski galeriji Račka in leto kasneje v galeriji Škuc na razstavi »Roževina zgodovine« v okviru festivala Mesto žensk (2020).

2022, str. 123 [prevod KK]). Za ustvarjanje obeh avtoric in načine pripovednega delovanja v njunih delih je posebej značilna tako imenovana »metapripovedna avtofikcija« (angl. *metanarrative autofiction*), ki »reflektira vlogo pripovedi (tako fiktivnih kot nefiktivnih) v procesih, ki osmišljajo naše življenje« (Meretoja, 2022, str. 122–123 [prevod KK]). Čeprav avtorici delujeta v različnih medijih, pripovedno delovanje vzpostavljata na podobne formalne načine, med katerimi je treba izpostaviti predvsem intertekstualnost: pastiš kritičnih diskurzov, literarne produkcije, pa tudi popkulturnih pripovedi in najdenih podob (angl. *found footage*) v registru metapripovedne avtofikcije. Naratološki pojem metapripovedi kot samorefleksivne pripovedi, v kateri pripovedovalske instance razmišljajo o lastni pripovedi, Meretoja nadgradi z avtofikcionalnostjo, prav zato, da bi podčrtala pragmatične aspekte: »pomen kulturnih pripovedi za posameznike in skupnosti in funkcije pripovedi v naših življenjih« (Meretoja, 2021, str. 122). Kot bomo videli v nadaljevanju, je za metapripovedno avtofikcijo obeh avtoric ključnega pomena kritično poistovetenje z bodisi vsiljenimi, sugeriranimi, sposojenimi ali pa z načrtno izbranimi naracijami. To poistovetenje preči različne pripovedne ravni (pripovedano, pripovedno, implicitno avtorsko) in je bistveno za konstitucijo metapripovedne avtofikcije, torej za refleksijo vlog različnih pripovedi za ustvarjanje smisla na različnih pripovednih ravneh. Avtorici na način metapripovedne nadidentifikacije orišeta identitetno nasilje, ki se kljub postmigracijski živi realnosti še vedno vsiljuje (»Boooosanka smrdiš«, Matković, 2021, str. 12; »hoejabi«[4] in »Gettoschlampe« ali »cipa iz geta«), obenem pa se mu z izbranimi (samo)naracijami ravno zaradi instance refleksije skozi poistovetenje tudi zoperstavita. Obe umetnici dejavno uokvirjata svoje avtorsko delovanje tudi preko vzvodov komentarja (Foucault, 1974, str. 17), predvsem z objavami na družbenih omrežjih, javnimi nastopi in intervjuji. Svojo aktualno gostujočo profesuro na berlinski Univerzi za umetnost je Anna Ehrenstein komentirala v objavi na svojem Instagram profilu (Ehrenstein, 2023a), kar je revija za sodobno umetnost Monopol (2023) povzela: »Tako kot Anna Ehrenstein se gotovo ni predstavila še nobena profesorica umetnosti: ob podpisu pogodbe za gostujočo profesuro na berlinski univerzi za umetnost je berlinska umetnica na Instagramu objavila svoje gole fotografije s plaže. ,Ko sem bila stara 18 let, sem se dvakrat prijavila na UdK in bila dvakrat zavrnjena, češ da ,ni bilo mogoče prepoznati nobenega umetniškega talenta', je zapisala Ehrenstein. ,Bila sem le majhna cipa iz geta, ki ni znala govoriti o umetnosti. Nato sem ponovno poskusila za magisterij in bila sprejeta, vendar sem morala zaradi negotovega finančnega položaja ugotoviti, da nimam dovolj privilegijev za ta magisterij, in se

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4   Gl. opis instalacijskega dela Anne Ehrenstein *Zen for Hoejabi* (»Zen za hoejabi«; 2020) v nadaljevanju. Izraz »hoejabi« je skovanka iz »hoe« kot osebe, predvsem žensko ospoljene, ki uporablja svoj videz za materialno korist (včasih pa tudi seks), in »hijabi« kot osebe, ki nosi hidžāb, znak vernih muslimank, ki naj bi poosebljale moralna načela islama. Anna Ehrenstein se v svojih delih velikokrat upodablja v erotičnih položajih, predvsem s »twerkanjem« z golo zadnjico, orientalskimi plesi in erotičnimi opravami. Glede razprave o delu lepote kot reproduktivnem delu in produkciji umetniške subjektivnosti glej Kobolt, 2023.

odločila, da bom opravila financiran program na drugi akademiji. Pri 30 letih sem postala profesorica ravno na tej univerzi.'« (Monopol, 2023 [prevod KK]). Reflektirano poistovetenje z »majhn[o] cip[o] iz geta, ki ni znala govoriti o umetnosti«, kar poimenujem metapripovedna nadidentifikacija kot mesto subjektivnega upora in kot solidarni odpor proti hegemonialni dihotomni predstavi družbe, ki ločuje na tiste, ki med drugim znajo govoriti o umetnosti in ji (kakor tudi družbi) pripadajo, ter »prišleke za vedno«, ki tega ne znajo. Z metapripovedno nadidentifikacijo tukaj obravnavani avtorici kritično naslavljata strukture in institucije produkcije družbenih razlik, ki jih domnevno družbeno nedoločena avtonomna umetnost in literatura, z njima pa marsikdaj tudi kritiški ter akademski diskurz, ne le reproducirajo, temveč tudi aktivno soustvarjajo. Zakaj so na področju tako imenovane »visoke« umetnosti in literature avtorji_ice iz t. i. marginaliziranih in neprivilegiranih skupin le redko zastopani_e ali pa so celo sistemsko izključeni_e? Skozi operacionalizacijo koncepta »postmigracije« poskušam s pričujočim besedilom razširiti obstoječi besednjak in konceptualne okvire literarne in umetnostne teorije, posebej naratološki aparat, zlasti v njegovem približevanju literarnemu in umetniškemu delovanju marginaliziranih ustvarjalcev_k in njihovim izrazom, ki so pogosto v kritičnem odnosu do hegemonske institucije avtonomne umetnosti in s tem do hegemonske distribucije moči.

Po mnenju filozofa, pedagoga in sociologa Erola Yildiza je značilnost koncepta postmigracij prav proti- in onkrajhegemonialen odnos do ustaljenih odnosov družbenih moči:

> Ta novi post-izraz ne implicira, kakor bi lahko domnevali iz predpone, zaprtosti ali premagovanja migracij, temveč premagovanje restriktivnega obravnavanja migracij na vseh družbenih področjih. To pomeni kritično obravnavo dosedanje produkcije znanja, revizijo tega, kar je bilo do zdaj povedano in kar je bilo izpuščeno [...]. (Yildiz, 2018, str. 48 [prevod KK])

Čeprav je bila v zadnjih letih predstava (dominantne) družbe kot nespremenljive (Nassehi, 2002) in temelječa na dihotomiji med »od tu« in »od tam«, med »pripadanjem« – »nami« in nepripadanjem – »njimi« deležna kritične obravnave (Yildiz, 2018; Bojadžijev & Römhild, 2014), so še vedno aktivne strukture ločevanja, ki določajo, kdo, kje, kdaj ter o čem in kako lahko oblikuje in povzdigne glas, ki bo slišan. »[Z]ares pomembna (novinarska) zgodba ne vsebuje vprašanja, zakaj je nekdo uspel, ampak predvsem, zakaj mnogi niso« (Matković, 2021, str. 79).

Če si prizadevamo za vključujoč odgovor na vprašanje, kdo je javnost ali kdo naj sodeluje v *res publica*, katere del naj bi bile v demokratični ureditvi vse družbene skupine, potem se morajo vse institucije in strukture, torej tudi institucije umetnosti, vključno z literaturo, odpreti za vse, in ne le za izbrance iz določenih družbenih razredov. Zato ob razmišljanju o načinih pripovednega delovanja v delih Dijane Matković in Anne Ehrenstein ter skupaj z njimi s pričujočim besedilom iščem jezik, podobe,

koncepte, orodja in politike, ki ne bi le opisali njunega ustvarjanja, ampak bi skupaj z njim zagozdile stopalo v priškrnjena institucionalna vrata avtonomne umetnosti, da se ta ne bodo več zapirala pred ustvarjalnostjo, vidnostjo in glasovi »tisočev«, ki jih evocira Dijana Matković z izbranim otvoritvenim citatom, prevzetim od bosanskohercegovskega kolega Faruka Šehića.

»JAZ SEM EDEN, VENDAR NAS JE TISOČE.«[5] – POSTMIGRACIJSKA PARADIGMA

Tisto, česar se tako Dijana Matković kot Anna Ehrenstein aktivno lotevata, zlasti z vztrajanjem pri govorjenju in prikazovanju v imenu »tisočev« postmigrantske realnosti, je kritika družbene konstrukcije »pristnosti« in s tem družbene konstrukcije razlik. Vendar najprej, kaj sploh pomenita koncepta postmigracije in avtofikcijskega narativnega delovanja (Meretoja, 2022), od kod izhajata in kakšna je njuna (migracijska) pot?

Koncept »postmigracije«, ki v najširšem pomenu opisuje »procese družbenih pogajanj, ki potekajo v fazi po migraciji« (Foroutan, 2015 [prevod KK]), sledi preseganju zgoraj naslovljene dihotomije, ki za družbo uporablja »metaforo posode, kateri se priključimo« (Hallensleben & Schramm, 2023, str. 11 [prevod KK]). Sicer akademsko skovanko so v desetletju po letu 2000 prevzeli_e in nadalje konceptualno razširjali_e predvsem umetniški_e ustvarjalci_ke znotraj nemškega produkcijskega okvira, vzporedno pa so ga konceptualno izpopolnjevali_e raziskovalci_ke v okviru študij migracij, zlasti njihovih kuloloških, socioloških in pedagoških usmeritev. Iz umetniških in akademskih krogov se je izraz prebil v politični besednjak. Kakor je v pogovoru, izhajajočem iz umetniškega raziskovanja in arhiva/instalacije *GOSTIkulacije* o jugoslovanskih delavkah na začasnem delu v bivši zahodni Nemčiji avtorice Margarete Kern, pojasnila raziskovalka medijev v okviru transkulturnih študij in kuratorka Nanna Heidenreich, je predpogoj za začetek preseganja ločevanja na tiste, ki naj bi bili »od vedno tu«, in na »prišleke za vedno« zakonski okvir, ki migracije priznava kot integrativni in tudi generativni del družbe (Heidenreich et al., 2013). Raziskovalka postmigracijske družbe, politologinja in islamologinja Naika Foroutan na spletni platformi nemške Zvezne centrale za politično izobraževanje takole opiše značilnosti oziroma pogoje postmigrantskih družb:

(a) družbena preobrazba v heterogeno osnovno strukturo je bila politično priznana (»Nemčija je država priseljevanja«) – ne glede na to, ali je ta preobrazba ocenjena pozitivno ali negativno, (b) priseljevanje in izseljevanje sta priznana kot pojava, ki množično oblikujeta državo in o katerih je mogoče razpravljati, jih urejati in se o njih

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5 Otvoritveni citat iz *Knjige o Uni* Faruka Šehića k romanu *Zakaj ne pišem* Dijane Matković (Šehić v Matković, 2021, str. 5).

pogajati, ne pa ju tudi obrniti, (c) strukture, institucije in politične kulture se prepoz-
nani migracijski realnosti prilagajajo na način dohitevanja (tj. postmigrantsko), kar
ima za posledico večjo prepustnost in družbeni napredek, pa tudi obrambne reak-
cije in porazdelitvene boje. (Foroutan, 2015 [prevod KK])

Rdeča nit, ki se vleče skozi vse tri segmente, od a) politično-legislativnega preko
b) družbenotvornega do c) strukturno-institucionalnega in kulturnega, je spozna-
nje, da so migracije nepovraten, konstitutiven ter generativen družbeni element. Z
drugimi besedami: migracije ne vplivajo samo na »one, ki so prišli« in ki naj bi se
integrirali v obstoječe, ampak tudi na »tiste, ki so že«. Migracije so motor (postmi-
gracijskih) družbenih sprememb, skozi katere se spreminja celotna družba na način
ustvarjanja novega, heterogenega »mi«.

Kakor v publikaciji, posvečeni fenomenom iz naslova pričujočega besedila –
postmigraciji in umetniškemu delovanju – prikažeta raziskovalca migracij Markus
Hallensleben ter Christian Schramm, oba s področja literarnih in kulturnih študij, se
koncept postmigracije v akademskem diskurzu udejanja v različnih legah: »Osredo-
toča se na postmigrantske subjektivnosti, postmigrantske družbe ali postmigracijo
kot novo analitično perspektivo« (Hallensleben & Schramm, 2023, str. 3 [prevod KK]).
V besedilu združujem prav vse tri lege koncepta postmigracije. Uporabim ga kot:
(a) analitični okvir pogleda na ustvarjalnost pisateljice Dijane Matković in vizualne
umetnice Anne Ehrenstein, (b) posebej opazujem načine narativnega delovanja
znotraj njunih del, s katerim (c) ubesedujeta, upodabljata postmigracijsko družbo
oziroma družbe, v katerih delujeta. Čeprav sta avtorici odrasli, živita in delujeta v
državah – ena v Sloveniji, druga v Nemčiji – ki kljub vključenosti v pretežno centra-
lizirani zakonodajni okvir EU s fenomeni migracij in postmigracijskimi procesi
upravljata precej drugače, pa prav zaradi teh razlik ugotovitve pričujoče primerjalne
analize obetajo vpoglede v živo stanje postmigracijskih procesov obeh kontekstov.[6]

AVTOFIKCIJSKOST KOT ORODJE POSTMIGRACIJSKE ESTETIKE

Zaradi razširjenosti avtofikcijskosti je bila ta v zadnjih letih deležna precejšnje
akademske pozornosti. Dosedanje akademsko približevanje pa tej protejski metodi ni
ponudilo stroge konceptualne zamejitve. Kot plastičen in širok konceptualni pogled
je tako avtofikcijskost sposobna zaobjeti široki spekter pojavov (Wagner-Egelhaaf,

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6   V slovenskem okviru zgoraj podani pogoji postmigracijske družbe, kakor jih povzame Forou-
     tan (2015), niso povsem izpolnjeni. Medtem ko je z nemškim migracijskim zakonom, veljavnim
     od leta 2005, Nemčija tudi *de iure* postala »dežela priseljevanja«, pa slovenski *Zakon o tujcih* že
     s samim naslovom zakona, pa tudi z njegovo artikulacijo in s strukturami, v marsičem zavira
     razvoj postmigracijske družbe. Kritiki naslavljajo predvsem nezadostne mehanizme in struk-
     ture znotraj sistema izobraževanja ter trga dela, nastanitve in podobno (Beznec & Gombač,
     2023, str. 256). Tudi sicer se slovenski kontekst, tudi zaradi bivše jugoslovanske federalne
     ureditve in drugih zgodovinskih dejavnikov, razlikuje od nemškega.

2019; Effe & Lawlor, 2022), kar večina avtorjev_ic pozdravlja. Kot značilnost avto-fikcijskega se najpogosteje opredeljuje ena ali več naštetih metod: »kombinacija resničnih in izmišljenih elementov, onomastično ujemanje med avtorjem in likom ali pripovedovalcem ter slogovno in jezikovno eksperimentiranje. Kjer se kritiki ali teoretiki bolj osredotočajo na kontekst produkcije in recepcije, najdemo tudi skli-cevanja na dvojni pakt – avtobiografski in fikcijski – ali na kombinacijo ali oscilacijo med načini branja« (Effe & Lawlor, 2022, str. 1 [prevod KK]). Kot v uvodu k zborniku, ki avtofikcijo obravnava onkraj njenih literarnih manifestacij, zapišeta literarna teore-tičarka Alexandra Effe in hispanistka Hannie Lawlor, je »[m]orda edina stvar, o kateri se lahko o tej metodi vsi strinjajo, osnovna etimološka ugotovitev: avtofikcija ima nekaj opraviti s samim seboj in s fikcijo« (Effe & Lawlor, 2022, str. 1 [prevod KK]). Avtorji_ice zbornika govorijo o avtofikciji kot žanru, pa tudi kot načinu (tako v smislu produkcije kot recepcije), ter o avtofikcijskem občutku sebe in avtofikcijskem pris-topu k samopredstavljanju in stopnjah avtofikcijskosti (Effe & Lawlor, 2022, str. 4). Po mnenju germanistke Martine Wagner-Egelhaaf (2022) naj bi bila avtofikcijskost načelna latentna komponenta avtobiografskega pisanja, ker naj bi šlo tudi pri avto-biografskem pisanju za preplet dejanskosti in fikcije, prav fikcijska dimenzija pa naj bi bila ta, ki podpira avtobiografske reference. Avtobiografija temelji na predpo-stavki o identičnosti oz. podobnosti med zunajbesedilnim »jazom« (avtorjem_ico), pripovednim »jazom« (pripovedovalcem_ko) in pripovedovanim »jazom« (pripo-vedovana junak_inja) oziroma na »avtobiografskem paktu« (Lejeune, 1994 [1975]), katerega sprejetje pri bralkah_cih je ključnega pomena za vzpostavljanje avtobio-grafskosti. Avtofikcija pa vsled fikcionalizacije priznava vrzeli med temi instancami in kot taka odpira prostor za kritično preučevanje konstitucije narativnega delovanja. V pričujočem besedilu avtofikcijskost obravnavam predvsem na ravni konstituiranja postmigrantskega narativnega delovanja kot odpora proti številnim pritiskom iden-titetnega nasilja, kot so razredno, spolno, nacionalistično in rasistično nasilje. »To je moja naracija, moje ustvarjanje smisla. Onkraj naracije so dejstva, s katerimi se težje živi« (Matković, 2021, str. 136).

Hanna Meretoja (2022), po kateri povzemam koncept »pripovednega delova-nja« in ga, sklicujoč se na dela Dijane Matković in Anne Ehrenstein, nadgrajujem s konceptom »metapripovedne nadidentifikacije« kot načina vzpostavljanja njunega narativnega delovanja, opredeljuje narativno delovanje kot konstitutivno za subjek-tivacijo in delovanje ter opozarja na njegovo družbeno pogojenost in neenakomerno porazdeljenost (tako znotraj posamezne družbe kakor tudi znotraj regionalnih ali globalnih entitet) (Meretoja, 2022, str. 123). Definira ga kot središčnega za samore-fleksivnost posameznikovih (pripovednih) možnosti znotraj »pripovednega okolja«, kar je ključno za delovanje in izpolnjeno življenje (Meretoja, 2022, str. 123). Nadalje razčleni tri središčne dimenzije pripovednega delovanja:

> Prvič, vključuje pripovedno zavedanje [izv. *narrative awareness*]: zavedanje različ-
> nih pripovednih perspektiv in kulturnega repertoarja pripovedi, ki krožijo v naših

kulturnih okoljih in nam zagotavljajo modele oblikovanja smisla. Drugič, vključuje pripovedno domišljijo [izv. *narrative imagination*]: zmožnost, da si predstavljamo onkraj tega, kar se zdi samoumevno v sedanjosti […], ter kritično in ustvarjalno sodelujemo s kulturno razpoložljivim repertoarjem pripovedi na načine, ki širijo naš »občutek za možno« […]. Njegov tretji vidik je pripovedna dialoškost [izv. *narrative dialogicality*]: zmožnost vstopati v odnose in biti del skupnosti, ki imajo svoje skupne »pripovedne vmesnosti« [izv. *narrative in-betweens*] […], tj. intersubjektivne mitologije in sisteme pripovednega osmišljanja [izv. *narrative sense-making systems*], ter sodelovati pri njihovi prenovi, prevpraševanju in preoblikovanju. (Meretoja, 2022, str. 123 [prevod KK])

Kakšni so torej načini pripovednega delovanja v delih obeh umetnic? Umetnici se v svojih delih produktivno poslužujeta metapripovedne avtofikcijskosti ob modelaciji odnosa med instancami različnih narativnih ravni: med avtorico kot besedilu in/ali umetniškemu delu zunanjo instanco, implicitno avtorico, torej znotraj pripovedi fingirano avtorico, in pripovedovalsko in/ali fokalizacijsko instanco ter z upodobljenimi protagonistkami.[7] Implicirana prekrivanja pripovednih/prikazujočih in prikazanih instanc, ki pa kajpak niso popolna, tako da lahko govorimo o »avtofikcijskem paktu«, ter njihova modelacija skozi postmigracijsko prizmo oblikujejo specifično pripovedno delovanje kot metapripovedno nadidentifikacijo z obstoječimi pripovednimi vzorci in s kulturnim repertoarjem, kar omogoča njihovo kritično obravnavo. Anna Ehrenstein meša izvirne posnetke, na katerih pogosto nastopa sama, z najdenimi posnetki. Podobno Dijana Matković pripoved plete kot intertekstualno mrežo citatov in misli različnih, večinoma tako imenovanih manjšinskih pisateljev, kot sta Didier Eribon in Eduard Louis, ki se prav tako zelo opirata na avtofikcijo. Matković in Ehrenstein v svoja dela vključujeta tudi citate in koncepte iz kritičnih raziskav in teorije, predvsem o globalnih družbenih, zlasti razrednih, rasnih in spolnih neenakostih ter o tem, kako se razlike vzpostavljajo in reproducirajo skozi različne sisteme: od šolanja, izobraževanja in institucionalizacije literarnih in umetniških praks preko materialne kulture do popkulturnih vsebin, diskurzov in politik.

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7 »Pripovedovalec in fokalizacija sta posrednika/posredovalca in gibali pripovedi. Medtem ko prvi pripoveduje (skozi glas), druga žarišči ali središči pripovedno informacijo (skozi oči) – narativni sistem ločuje subjekt govora, tj. pripovedovalca, in subjekt gledanja, tj. fokalizatorja ali ožariščevalca« (Zupan Sosič, 2014, str. 47).

»PRECEJ ČASA JE POTREBNEGA, DA ZVENIŠ KOT TI SAM.«[8] – DIJANA MATKOVIĆ

Vzvod pripovednega delovanja v delu *Zakaj ne pišem* je metapripovedna nadidentifikacija z od zunaj določeno pozicioniranostjo, ki vse pripovedne instance opredeljuje razredno in/ali etnično na različne načine:

- skozi (i) materialne signale – način ureditve bivališča njene priseljenske delavske družine (nedokončana in skromno opremljena hiša), skromna oblačila, stari avtomobili itd. – in (ii) kulturne signale – ime, način govorjenja staršev junakinje, ki niso materni govorci slovenskega jezika v smislu kreolizacije jezikovne rabe, naglasa in glasnosti, glasnega poslušanja folk glasbe itd.:

> Pozna jesen je. Blato pred vrstno hišo brez fasade in balkonske ograje, v blatu nametana še ne žagana drva za ogrevanje, na mestu, kjer imajo sosedje lične vrtičke in vitice vrtnic speljane po balkonskih ograjah. Oče se na dovoz pripelje z enim od svojih prijateljev bosancev, v katrci bež barve, iz katere se sliši glasna, preglasna bosanska narodnozabavna glasba. »Smanji to, nismo u Bosni,« mu reče, ko ta potegne ročno. Sosedje gledajo izza svojih ograj. Prijatelj, ki ga kliče Macola, zaradi njegove očesu očitne fizične moči, skoči in se s prsti zaziblje na betonu balkana brez ploščič.
> Marsikaj bi bilo drugače, če mamin starejši brat, gastarbajter *u Šveckoj*, staršema ne bi posodil denarja za kredit, s katerim sta pričela graditi to nesrečno vrstno hišo, natlačeno med druge, ki jim razen arhitekturne zasnove ni bila v ničemer podobna. Propad podjetij, kjer sta delala, Jugoslavije in njunega zakona, ki v nasprotju z nekdanjo skupno državo nikoli ni bil kaj prida, so se zgodili prehitro, da bi lahko hišo dokončala. Notranje stopnice tako niso bile pokrite s ploščicami ali lesom, pač pa smo imeli na gol beton položene preproge *krpare*, narejene iz ostankov cunj, ki sva jih morali s sestro vsak konec tedna stresati pred hišo – spet, pred očmi sosedov. (Matković, 2021, str. 10, 11)

- skozi (iii) institucionalne in medosebne odnose – »skrhani družinski odnosi kot kolateralna škoda socialno-ekonomskih stikov« (Matković, 2021, str. 16), diskriminatorni odnosi na področju šolanja, ki se odražajo tako v šolskem delovanju in uspehu kot v načinu življenja, diskriminatorni profesionalni odnosi, ki se odražajo v težavah z artikulacijo avtorskega glasu, (samo)naracijo okolja ipd.:

> Zadnjič sem se zapletla v pogovor z znanko, prav tako iz delavske, oziroma kmečko-delavske družine. Da je vedno hotela biti igralka, je rekla, a je za študij naposled izbrala nekaj drugega, bolj uporabnega. »Moji so mi, odkar vem zase, govorili: Mi smo pri tleh, kjer je delo.« Odrejali so ji mesto. In sporočali, kaj delo sploh je – nekaj, kar je pri tleh, kar igra vsekakor ni. Morda je njeno izbiro bolj

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8   Citat Milesa Davisa v Matković, 2021, str. 105.

> pragmatičnega študija pogojeval tudi strah, če prihajaš iz pomanjkanja, iščeš čim hitrejšo pot ven, službo, ki ti bo zagotovila preživetje.
>
> [...]
> V tej »kritiki« z neznansko dolgim uvodom, v katerem skuša legitimirati dozdevno *nelagodje* (vsekakor ne tesnobe) ob svojem početju, pravi, da je to, kar pišem, ena navadna laž in pretvarjanje – »Ne dosega globine izkušnje resničnega človeka [*sic!*],« zapiše. [...] Po njeni kritiki dolgo nisem mogla izreči ničesar. Ni je bilo javne teme, okoli katere bi se upala opredeliti, ni bilo besedila, ki bi ga lahko napisala.« (Matković, 2021, str. 222)

Metapripovedna nadidentifikacija se razteza čez različne pripovedne ravni, vendar se ne udejanja na vseh enako. Medtem ko se pripovedovana junakinja identificira z od zunaj sugeriranim načinom branja lastnega bivanja, pa pripovedovalka, ki se z načinom bivanja še vedno identificira (navsezadnje gre za njeno preteklost, sedanjost in načine osmišljanja njene prihodnosti – življenje!), tako te načine kot njihova branja reflektira in za to uporablja predvsem intertekstualnost.

> Ničesar od tega takrat nisem razumela. Meni so se reči še dolgo samo dogajale. Bila sem otrok. Ki ga je bilo nenehno sram. Sram je bil vgrajen vame, že v maternici, kot želodec, pljuča, debelo črevo. Sram me je bilo, ko se mama v nobeni socialni situaciji ni znašla, ker je ni razumela. Sram me je bilo revščine. Sram me je bilo tiste glasne narodnozabavne glasbe. In posledično – sram me je bilo same sebe. (Matković, 2021, str. 11)

Ko pripovedovalka te izkušnje o pripovedovani junakinji – pretekli različici sebe – reflektira, se nasloni na delo *Opraviti z Eddyjem* Eduarda Louisa, in sicer na njegovo ugotovitev o različnih doživetjih in percepcijah sveta, od katerih pa imajo nekateri večjo avtoriteto ob določanju, kaj se resnično dogaja in kaj ne. »Če nasilja – sistemskega ali individualnega, ki sta vzročno povezana – na podlagi razreda, nacionalnosti, pa tudi spolne usmerjenosti, barve kože, spola in tako dalje ne opazite, je to precej zanesljivo znamenje, da ste privilegirani« (Matković, 2021, str. 12). Nemška pisateljica in kritičarka rasizma Tupoka Ogette to v svoji knjigi *Exit Racism* poimenuje »happy land« oz. »srečna dežela« (Ogette, 2019). Da bi lahko nasilje, ki se določenemu delu družbe ne dogaja, drugemu pa, sploh postalo vidno, otipljivo, nagovorljivo, da bi torej to nasilje sploh lahko bilo individualno in družbeno prepoznano kot nasilje, je potreben izhod iz t. i. »srečne dežele«, v kateri naj se to nasilje sploh ne bi dogajalo. »Fenomen nezaznavanja« (Matković, 2021, str. 13) ter mehanizma zanikanja (angl. *gaslighting*) ali tudi obtoževanja žrtve (angl. *victim blaming*) so med drugim načini obrambnih mehanizmov za poskus obstanka v »srečni deželi« privilegijev (Ogette, 2019). Ko Matković opisuje nepripadanje, ki lahko okolje spremeni v vir nevarnosti, kot mogoči razlog za natančnejše opazovanje, ki je predpogoj vsakega pisanja, nagovori pravzaprav prav te mehanizme.

Pisci praviloma postanejo tisti in tiste, ki sprva niso imeli možnosti, da bi se v svetu udeleževali, in so bili zato obsojeni na to, da ga samo opazujejo. Še več: morda so v pisanju dobri predvsem tisti, za katere je bilo okolje vir nevarnosti in so ga morali v stalni budnosti opazovati, preučevati. Prisluškovati pogovorom, razbirati skrite pomene, podtone, vedeti, kaj sledi, če je beseda izrečena na način, in kaj, če je izrečena na drug. Dobri postanejo, če uspejo premagati omejitve, v katere so bili rojeni, in preseči ponotranjeno sovraštvo, ki jih pri pisanju blokira. Najmanj to, seveda. [...]

Ko se naposled oglasimo, mi in me *od drugod*, moramo, da bi bili sploh uslišani, proizvesti bistveno več hrupa kot tisti, ki posedujejo mir zavedanja, da jim javnost pripada, predvsem pa imajo vrata vanjo na stežaj odprta. Hrupni smo, da bi bili sploh prepuščeni k besedi, slišani. Na tej točki smo razglašene in razglašeni za *attention whores.* Za kurbe. Za *une problematične.* (Matković, 2021, str. 46, 204)

Znotraj afektne ekonomije manjšinskega pripovednega delovanja, kakor ga opisuje Matković, ima središčno vlogo občutek prilaščanja, zlasti v smislu »sindroma preva-rantke« (angl. *imposter syndrome*).

Sindrom prevarantke se pri meni oglasi tudi skoraj ob vsakem besedilu, ki ga skušam napisati: naj jih imam za sabo že desetine, še je tu glas, ki mi pravi, da ne znam, da nisem dovolj poučena, dovolj nadarjena, da moje zgodbe niso dovolj pomembne, zaradi česar je nemara bolje, da molčim. [...] Strah, da se bom osmešila. Strah, da me bodo razkrin-kali. *Mene prevarantko*, ki sem se pritihotapila v inte-lektualno-umetniški svet, ko nihče ni gledal. (Matković, 2021, str. 71, 72)

Slika 1: Ilustracija za naslovnico romana *Zakaj ne pišem* Dijane Matković (s prijaznim dovoljenjem avtorice ilustracije Samire Kentrić).

Dijana Matković kot zunajbesedilna avtorica, njena implicitna avtorica, ki sovpade s pripovedovalko, in pripovedovana junakinja kršijo vseh petnajst ostalih pravil, o katerih ne bi govorile in pisale, če jih ne bi kršile in če svinčnik na ilustraciji naslovnice avtorice Samire Kentrić ne bi bruhal ognja (gl. Sliko 1):

Ob zahtevah, ki si jih glede pisanja zastavljam sama, obstajajo še zahteve in pravila kulturnega okolja, v katerem se nahajam, ki odreja, o čem se sme pisati oziroma javno govoriti ter kdaj, kdo in na kakšen način.

Pravila so naslednja:
1. Ne smeš se navduševat. [...]
2. Ne smeš pisat na preprost, dostopen način. [...]
3. Ne smeš bit vulgarna, ker bo to označeno kot nestrpno. [...]
4. Ne smeš se izvleči iz pomanjkanja. [...]
5. Ne smeš navajat napačnih referenc. [...]
6. Ne smeš nasprotovat ljudem, ki imajo večji socialni kapital. [...]
7. Ne smeš bit samozavestna. [...]
8. Ne smeš se spogledovat s popularno kulturo in ne smeš bit brana. [...]
9. Ne smeš bit duhovita, igriva, osebna, čustvena. [...]
10. Ne smeš si »prisvajat velikanov«. [...]
11. Ne smeš »poljubno« združevat literarnih zvrsti. [...]
12. Ne smeš »skrunit« slovenskega jezika. [...]
13. Ne smeš govorit »v imenu drugih«. [...]
14. Ne smeš govorit o razredih. [...]
15. Ne smeš bit jezna, agresivna, nasilna. [...] (Matković, 2021, str. 228–235)

Marsikatera od teh prepovedi je usmerjena v varovanje tako imenovane »pristnosti«: Govorjenje v imenu drugih, družbeno-razredni dvig, neupoštevanje avtoritete, zavzemanje suverenosti v govoru, prisvajanje in mešanje različnih zvrsti in jezika veljajo za prisvajanje in s tem kršitev pristnosti.

»V BLAZNOSTI IZGUBLJENI PARAMETRI PRISTNOSTI«[9] – ANNA EHRENSTEIN

V delih Anne Ehrenstein[10] se avtofikcijskost udejanja:
(i) preko samoupodabljanja (največkrat s sebki – tako fotografijami kakor tudi videoposnetki), upodabljanja svoje družine, kolegov_ic in prijateljev_ic[11] ter z

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9   Citat iz dela Anne Ehrenstein *Zen for Hoejabi* (»Zen za hoejabi«; 2020).
10   Prim. umetničino spletno stran: http://annaehrenstein.com.
11   Npr. v videu *L'Original* (»Original«; 2017); *Capitalocene Safari Collage* (»Kapitalocen safari kolaž«; 2020) in drugje.

metodo samoudeležbe, tako v smislu procesa in reprezentacije umetniškega raziskovanja,[12] pa tudi s komentiranjem ali moderiranjem prikazanih podob.[13]

Instalacijsko delo z naslovom *Zen for Hoejabi* (»Zen za hoejabi«; gl. Sliko 2) sestavljajo dva *vis-à-vis* postavljena doprsna kipa (tridimenzionalna odlitka umetničine glave, zakrite z ruto, torej avtoportreta umetnice kot muslimanke) ter tkanine z lentikularnimi odtisi. Umetnica se tu upodobi tudi v dvokanalnem videu, predstavljenem na dveh pametnih telefonih. Z živo rdeče namazanimi ustnicami in zgoraj brez leži pred umetno generiranim in utekočinjenim ozadjem iz leopardjega krzna in rdečih vrtnic, lascivno vejpa in poroča o »v blaznosti izgubljenih parametrih pristnosti«. Sebek ali samoupodabljanje je element, ki ga umetnica uporabi praktično v vsakem svojem delu.

Slika 2: Pogled na instalacijo *Zen for Hoejabi* avtorice Anne Ehrenstein, 2019, tkanina, 3D odlitka, pametna telefona, vznožek na razstavi *SITUATIONS/Porn*, Photomuseum Winterthur (s prijaznim dovoljenjem umetnice).

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12 Multidisciplinarni sklop, naslovljen *Tales of Lipstick and Virtue* (»Zgodbe o šminki in kreposti«; 2015–2018), ki temelji na fotografijah, izhajajočih iz umetničine raziskave v kozmetičnih salonih v Tirani, s profilov družbenih omrežjih njihovih uporabnic, ki jih je umetnica spoznala med raziskavo, tako da je tudi sama postala njihova uporabnica, pa tudi z najdenih posnetkov in podob.

13 Npr. v video delih *Anna Ehrenstein Real Thomas Metzinger* (»Anna Ehrenstein pravi Thomas Metzinger«; 2019), *Zen for Hoejabi* (»Zen za Hoejabi«; 2020), *Clans Of Berlin – with Rebecca Pokua Korang* (»Berlinski klani – z Rebecco Pokua Korang«; 2023).

Nadaljnja orodja pripovednega delovanja v delih Anne Ehrenstein, ki se vzpostavlja kot metapripovedna nadidentifikacija, so:

(ii) reference upodobljenih krajev, kot je domovina njenih staršev – Albanija,[14] uporaba aktualnih diskurzov in najdenega materiala (od rasističnih medijskih vsebin, predvsem iz nemških medijev, do vsebin iz družbenih omrežij, predvsem takih, ki tematizirajo »pristnost« – npr. ugotavljanje, kaj je ponaredek in kaj je original – kritični akademski in aktivistični diskurzi);[15]

Video delo *Clans of Berlin* (2023), ki ga je ustvarila skupaj s plesalko Rebecco Pokua Korang, tematizira medijsko poročanje o kriminalnosti klanov, definicijo te kriminalnosti znotraj nemškega kriminalističnega okvira, ki ločuje kriminalnost klanov od drugih oblik organiziranega kriminala, ter politično apropriacijo tega kriminala, sploh v primerjavi s skrajno desničarsko kriminalnostjo (načrtovani *coup d'état* skrajno desničarske (neo)nacionalsocialistične organizacije Reichsbürger v letu 2022),[16] ter se sprašuje o etnizirani, rasizirani in islamofobni diskurzivni podstati uokvirjanja kriminalnosti klanov.

> Kriminalnost klanov je definirana kot »kriminal sorodnikov etnično izoliranih subkultur« in oblika organiziranega kriminala. Sledeč BKA [*Bundeskriminalamt*, nemški Zvezni urad za kriminal] je za to obliko kriminala značilen lastni vrednotni red storilcev in njihovo temeljno zavračanje nemškega legalnega okvira. Trdijo, da imajo klani »močan poudarek predvsem na hierarhično urejenih patriarhalnih družinskih strukturah. Pomanjkanje pripravljenosti za integracijo z aspekti prostorske koncentracije. Nagnjenje k provokacijam tudi ob manjših kršitvah zakona. Izkoriščanje skupinskih groženj in mobilizacijskih potencialov.« (Ehrenstein, 2023b [prevod KK])

Pomembno vlogo pa odigra tudi (iii) motivna navezava na (post)migracijsko materialno kulturo, na muslimanstvo ter globalni jug – vse od značilnih vzorcev, arhitekture, oblačil, hrane, upodobljenih predmetov, kot so stojnice s ponarejenim blagom, plesov (od orientalskih do erotičnih plesov, kot so umetničino ponavljajoče »twerkanje« z golo zadnjico), do videza (v širokem spektru, od skladno z islamskimi religioznimi pravili oblečene do hiperžensko stilizirane podobe in »blackfishinga« oz. posnemanja videza temnopoltih).[17]

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14 Npr. v video delih *Tales of Lipstick and Virtue – FAKE OG'S* (»Zgodbe o šminki in kreposti – PONAREJENI ORIGINALI«; *2020*), *The Albanian Conference* (»Albanska konferenca«; 2021) in drugje.

15 Kot v delu *Clans Of Berlin – with Rebecca Pokua Korang* (»Berlinski klani – z Rebecco Pokua Korang«; 2023).

16 7. decembra 2022 so nemške varnostne službe ateirale 25 pripadnikov organizacije Patriotische Union, sicer članice (neo)nacionalsocialistične skupine Reichsürger, ki ne priznava Zvezne republike Nemčije in se zavzema za meje nemškega ozemlja iz 19. stoletja (Gaube, 2022).

17 V videu *Anna Ehrenstein Real Thomas Metzinger* (2019) se npr. umetnica upodablja neposredno po lepotni operaciji ter tematizira načine percepcije in konstitucije sveta ter subjektivnosti.

Anna Ehrenstein se v večdelnem video in instalacijskem projektu *The Albanian Conference* (»Albanska konferenca«, 2021), ki ga je ustvarila skupaj z afrobeat duom DNA, kuratorko Fadescho in plesalko Rebecco Pokua Korang, naveže na zgodovinsko konferenco afro-azijskih pisateljev, ki je potekala leta 1958 v Taškentu in je bila ključnega pomena za razpravo o nacionalni osvoboditvi, tudi jezika umetnosti nasproti prevladujočemu zahodnemu modernističnemu kanonu. *Albansko konferenco* so sodelujoči_e umetniki_ce udejanjili_e kot skupno potovanje v Albanijo, med katerim so ustvarjali_e večinoma glasbene videe afrobeat glasbe z aktivističnimi dekolonialnimi in protirasističnimi besedili, usmerjenimi proti neokolonialnemu izkoriščanju in restriktivni migracijski politiki. Tako video *Albanian Conference: DNA – Wahala* (2021; gl. Sliko 3) prikazuje futuristične in delno hiperseksualizirane nastope sodelujočih umetnikov_ic, ponavljajoče se motive demonstracij, policijskega nasilja in požarov, zanetenih v uporih temnopoltih, pa tudi požarov v naravi, ki se širijo. Ognjeni zublji mestoma kakor ognjeni avreoli obkrožajo tudi sama temnopolta glasbenika.

Slika 3: Izsek iz videa *Albanian Conference* avtorice Anne Ehrenstein z DNA, Fadescho in Rebecco Pokua Korang, 2021. S prijaznim dovoljenjem umetnice.

»KAJ SE ZGODI, KO SI PODREJENI PRISVAJAJO?«[18]

Poleg tehnike prekrivanja svojih in tujih sebkov se Anna Ehrenstein velikokrat poslužuje tudi montaže najdenih posnetkov v zvezi z vprašanji proizvodnje, kroženja in družbene konstrukcije pomena ponaredkov, zlasti tako imenovanega ponarejenega modnega blaga (Ehrenstein et al., 2020b). Motiv proizvodnje, distribucije in

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18   Ehrenstein, 2020a, str. 22

kulturnega osmišljanja originalov in ponaredkov je tako pri Anni Ehrenstein kot pri Dijani Matković (ena od kritik delovanja avtorice se je glasila: »Ne dosega globine izkušnje resničnega človeka«; Matković, 2021, str. 222) središčnega pomena – predvsem v navezavi na vprašanje, kdo, kje, kdaj in kako lahko vzpostavi pripovedno delovanje in avtorsko subjektivnost.

Sociolog Slobodan Karamanić in umetnica Manuela Unverdorben sta se spraševala o družbeni konstrukciji tako imenovane »balkanske glasbe sveta« kot »visoke« glasbe, vredne poslušanja s strani višjih razredov bogatega severa, medtem ko se na drugi strani z »balkansko pop-folk glasbo« ali »turbofolkom« zvoči predvsem periferni, pavperizirani globalni jug (Karamanić & Unverdorben, 2019). Avtorja v bourdieujevski maniri ugotovita, da je to, kar ločuje ta dva podobna glasbena »produkta«, njuna recepcija (Bourdieu, 1983) – pri čemer ne gre (nujno) za načine recepcije te glasbe, ampak predvsem za to, *kdo posluša* ti dve vrsti glasbe. Izhajajoč iz materialistične teze, da »logika kapitalistične produkcije in poblagovljenja zajame vse razlike pod splošno ekvivalenco (denar)«, avtorja opozorita, da sta predpogoj produkcije presežne vrednosti predprodukcija in reartikulacija razlik (Karamanić & Unverdorben, 2019, str. 164 [prevod KK]). Z drugimi besedami: avtorja zaključita, da je družbena proizvodnja razlik bistvenega pomena za kapitalistični način produkcije (Karamanić & Unverdorben, 2019, str. 164). Različni statusi in pomeni teh predartikuliranih razlik legitimirajo različne položaje nosilcev teh razlik v družbeno-statusno opredeljenih produkcijskih procesih: skozi te procese postajajo ljudje bodisi večbodisi manjvredni ali celo »neljudje«.

Podobno obe tukaj obravnavani avtorici locirata proizvodnjo pristnosti v moči, o kateri odloča vprašanje, kdo in kaj ima performativno moč, da nekaj ali nekoga – predmete ali ljudi – spremeni v original ali ponaredek. Tako je Anna Ehrenstein svojo ljubljansko predstavitev, sestavljeno iz del *L'Original* (»Original«; 2017) in *Inverted Appropriation* (»Obrnjena apropriacija«, 2018; gl. Sliko 4), pospremila z besedilom, v katerem se sprašuje o globalnih in lokalnih kulturnih in ekonomskih vidikih priljubljenosti videza umetnih kitk, prej predvsem manjšinskega, afriškega in afroevropskega ter afroameriškega načina oblikovanja frizure: »Kaj se zgodi, ko si podrejeni [izv. *subaltern*] prisvajajo? Kako procesi kulturnega prisvajanja spreminjajo družbene medije? Ali lahko podrejeni tvitajo?« (Ehrenstein, 2020a, str. 22). Instalacijsko delo, sestavljeno iz videa in tapiserije iz umetnih kitk (angl. *box braids*) z napršenim zlatim albanskim nacionalnim simbolom – triglavim orlom – preko priljubljenosti videza umetnih kitk v Albaniji ter motiva proizvodnje, distribucije in vloge originalov in ponaredkov tematizira geopolitične, materialne in kulturne vidike prilaščanja in solidarnosti.

Slika 4: Pogled na instalacijo *Inverted Appropriation* avtorice Anne Ehrenstein, 2018, stensko delo iz umetnih kitk in pršila na razstavi *Roževina zgodovine*, Mesto žensk v galeriji Škuc. S prijaznim dovoljenjem umetnice in fotografinje Nade Žgank.

> Solidarnost ni prilaščanje trpljenja, ampak sočustvovanje s trpečimi, kar v sebi že imamo, le da smo se naučili sočutje rezervirati – kar je sicer značilnost verskih fana- tikov – za svoj krog izbrancev. Očitek prilaščanja nas v tem spodbuja. Naučiti se moramo pozornega poslušanja, ozaveščanja in učenja o stiskah drugih. Tako bomo kaj kmalu ugotovili, da si vsi tako ali drugače prizadevamo za isto, za življenje z digni- teto. Za družbo, v kateri nismo na vsakem koraku poniževani, izkoriščani, izključeni, ker to ustreza, kot pravim, nekomu za ustvarjanje kapitala. Z dvigom identitete na raven razrednega boja se bomo na drugi strani naučili tudi prepoznavati različne odtenke zatiranja, njegovo kompleksnost [...]. (Matković, 2021, str. 127)

V pogovoru na okrogli mizi o kulturnem prilaščanju, ki jo je leta 2017 organiziral časopis za umetnost *Art Forum*, se je postkolonialni teoretik Homi K. Bhabha (sledeč Walterju Benjaminu) raje kot za koncept prilaščanja zavzel za koncept prevajanja:

> [N]ajsi gre za besedilo, predhodni zgodovinski trenutek ali predhodno identiteto, obstaja nekaj predhodnega tistemu, kar se prevede. Za razliko od prilaščanja je prevajanje odnos, ki ne daje takoj privzete vrednosti nekakšnemu izvirniku; predho- dnega ne vidimo kot »ustreznega« [izv. *appropriate*] ali »izvirnega« besedila. (Bhabha et al., 2017 [prevod KK])

ZAKLJUČEK: METAPRIPOVEDNA NADIDENTIFIKACIJA

V zaključku se želim navezati tako na tezo o prevajanju kot »procesu interpretacije, premestitve in proizvodnje« (Bhabha et al., 2017) kot tudi na misel o ključni vlogi procesov proizvodnje družbenih razlik pri trenutnem hegemonskem načinu družbene proizvodnje in ureditve (Karamanić & Unverdorben, 2019, str. 164), ki ga obstoječe družbene strukture, vključno z institucijami umetnosti in literature, vse prevečkrat ne presegajo, ampak ga celo *mis-en-abymsko* odsevajo. Za avtofikcijsko pripovedno delovanje v delih Dijane Matković in Anne Ehrenstein je torej intertekstualnost, kot meni Homi K. Bhabha, »prevajanje« besedil, podob, zvokov, zgodovinskih dogodkov, koreografij, materialnih praks ipd. osrednjega pomena, pravzaprav njegov pogoj. Na eni strani gre pri tem prevajanju za identifikacijo s prevedenim, kot kažeta primera citata »Jaz sem eden, vendar nas je tisoče« (Šehić v Matković, 2021), pa tudi samostilizacije Anne Ehrenstein v njenih delih preko globalnega hiperženskega ali tudi muslimanskega videza (Kobolt, 2023). Na drugi strani pa je to poistovetenje kritično reflektirano. Pripovedno delovanje v delih Dijane Matković in Anne Ehrenstein se vzpostavlja na način metapripovedne nadidentifikacije, s čimer na eni strani razkriva načine produkcije, reprodukcije, distribucije in kulturnega osmišljanja družbenih razlik ter njihovega udejanjanja v procesih vladanja oz. hegemonije nekaterih družbenih skupin nad drugimi, na drugi strani pa se temu tudi zoperstavlja. Metapripovedna nadidentifikacija omogoča kritično razmišljanje o od zunaj sugeriranim predhodnim (npr. z vsiljeno drugostjo). Avtorici skozi pripovedno delovanje uprizarjanja »sebe« z intenzivno intertekstualnostjo oblikujeta pripovedni in pripovedovani »jaz« kot podaljšek zunajbesedilnega »jaza« ali svoje umetniške subjektivnosti. Na ta način ustvarjata hibridizirani pripovedovani »jaz« (pripovedovani junakinji), s katerim ne uveljavljata le singularnosti, temveč tudi univerzalnost. Razredno, spolno in etnično zaznamovana in diskriminirana ter proti diskriminaciji boreča se implicitna avtorica pripoveduje razredno, spolno in etnično zaznamovano in diskriminirano ter proti diskriminaciji borečo se pripovedovalko. Ta pa nadalje udejanja razredno, spolno in etnično zaznamovano in diskriminirano ter proti diskriminaciji borečo se pripovedovano junakinjo.

Analizo pripovednega delovanja Dijane Matković in Anne Ehrenstein naj zaključim na način *mis-en-abymskega* refleksa metapripovedne nadidentifikacije: pričujoče besedilo in njegova avtorica se skupaj s tukaj analiziranima avtoricama, ki nas »večinska družba« imenuje »čefurje_ke«, »Bosance_ke«, »Kanak*innen«,[19] »migrante_ke« ali »ženske« in kar je podobnih poimenovanj, bori za glas, za vidnost, za delovanje prav skozi prevajanje glasov, podob in delovanj tistih, ki nas je »tisoče« in ki stojimo in prihajamo kot ogenj, ki se nezaustavljivo širi.

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19   Nemški izraz *Kanake* ali spolno nezaznamovana množinska oblika *Kanak*innen* se v svojih dveh slabšalnih pomenih nanaša na »tujca, pripadnika druge, tuje etnične skupine« ali »zaničevanja vredno, sovražno osebo« (Duden, n.d. [prevod KK]).

ZAHVALE IN DRUGI PODATKI

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SUMMARY

POSTMIGRATION AESTHETICS: AUTOFICTIONAL METANARRATIVE AGENCY IN THE WRITING OF DIJANA MATKOVIĆ AND THE VISUAL WORK OF ANNA EHRENSTEIN
Katja Kobolt

The text turns to autofictional narratives of postmigration experiences, as presented in the novel *Why Don't I Write?* by Dijana Matković (b. 1984, Novo Mesto, Slovenia) and in video and installation works by Anna Ehrensein (b. 1993, Dortmund, Germany). In their works, both artists critically address the structures and institutions of the production of social differences, which are not only reproduced but actively co-created by the supposedly socially indeterminate autonomous art and literature and, with it, often also by critical and academic discourse. Through the concept of "postmigration," the present text expands the existing vocabulary and conceptual frameworks of literary and art theory, especially the narratological apparatus, particularly in its approach to the literary and artistic work of marginalized authors and their expressions, which are often in a critical relation to the hegemonic institution of autonomous art and, and by extension, to the hegemonic power distribution. The text specifically focuses on what is called "narrative agency," which is "a constitutive aspect of our agency as we participate, through our actions and inactions, in narrative practices that perpetuate and challenge social structures" (Meretoja, 2022, p. 123). For the autofictional narrative agency in the works of Dijana Matković and Anna Ehrenstein, intertextuality, or the "translation" (Bhabha et al., 2017) of texts, images, sounds, historical events, choreographies, material practices, and critical emancipatory discourses (feminism, antiracism, anti-capitalism, and anti-colonialism), is of central importance; it is its condition.

On the one hand, this translation is about identification with the "translated." On the other hand, the identification opens up a metanarrative instance and enables critical reflection on the externally suggested anterior ("otherness" or "inauthenticity"). In reference to *metanarrative autofiction*, which "reflects on the role of narratives (both fictional and nonfictional) in the processes in which we make sense of our lives (Meretoja, 2022, p. 122), the author proposes to call this process "metanarrative overidentification." In Anne Ehrenstein's work, autofiction is enacted through (i) self-representation, the depiction of her family, colleagues, and friends and the method of self-participation; (ii) the references of the depicted places, as well as the use of current discourses and found footage; (iii) motifs from (post-)migration, Muslim, and material culture of the global south. Similarly, Dijana Matković weaves the narrative as an intertextual web of quotations and thoughts from various, mostly so-called minority writers who rely on autofiction. The lever of narrative agency is a metanarrative overidentification with an externally determined positionality, which, in the case of Dijana Matković's writing, defines all narrative instances in class and/

or ethnic terms through (i) material signals, (ii) cultural signals, and (iii) institutional and interpersonal relations. Thus, the artists critically confront constructions of authenticity, in particular, and create a hybridized narrated "self" that asserts both singularity and universality.

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Revija *Dve domovini / Two Homelands* je namenjena objavi znanstvenih in strokovnih člankov in knjižnih ocen s področja humanističnih in družboslovnih disciplin, ki obravnavajo različne vidike migracij in z njimi povezane pojave. Revija, ki izhaja od leta 1990, je večdisciplinarna in objavlja članke v slovenskem ali angleškem jeziku. Letno izideta dve številki v tiskani in elektronski obliki na svetovnem spletu (https://ojs.zrc-sazu.si/twohomelands).

Prispevke, urejene po spodnjih navodilih, pošljite uredništvu v elektronski obliki na naslov dd-th@zrc-sazu.si. Članki so recenzirani. Avtorji so odgovorni za jezikovno in slogovno dovršenost člankov. Rokopisov, ki jih uredništvo sprejme v objavo, avtorji ne smejo hkrati poslati drugi reviji. Avtorji se strinjajo, da se objavljeni članki v tiskani reviji *Dve domovini / Two Homelands* objavijo tudi v elektronski obliki na svetovnem spletu.

2. Sestavine prispevkov

Celoten članek je lahko dolg največ 60.000 znakov s presledki (vključno z literaturo) in mora vsebovati sestavine, ki si sledijo po naslednjem vrstnem redu:
- Naslov članka (okrepljeno) naj bo kratek, jasen in naj vključuje ključne pojme iz članka.
- Ime in priimek avtorja. Priimku naj sledi opomba pod črto, v kateri so s podpičjem ločeni štirje elementi:
  - avtorjeva izobrazba (na primer: ,dr. zgodovine');
  - ime avtorjeve institucije: Ustanova, Oddelek, Mesto (na primer: ,ZRC SAZU, Inštitut za slovensko izseljenstvo in migracije, Ljubljana');
  - avtorjev elektronski naslov;
  - šifra ORCID.
- Predlog vrste prispevka (izvirni, pregledni ali kratki znanstveni članek oz. prispevek)
- Izvleček: do 700 znakov s presledki
- Ključne besede: do 5 besed
- Izvleček v angleškem jeziku (Abstract): do 700 znakov s presledki
- Ključne besede v angleškem jeziku (Keywords): do 5 besed
- Glavno besedilo, po potrebi razdeljeno na poglavja in podpoglavja
- Zahvale in drugi podatki: Informacije o projektu oz. financiranju (če je članek nastal v okviru projekta) ter morebitne zahvale avtorja oz. avtorjev (neobvezno)
- Seznam literature (urejen po spodnjih navodilih)
- Angleški povzetek prispevka (Summary) s prevedenim naslovom (ameriško črkovanje): do 3.000 znakov s presledki

3. Oblika

- Celotno besedilo naj bo označeno s stilom »Normal« – brez oblikovanja, določanja slogov in podobnega;
- Robovi strani: »Normal« (2,5 cm na vseh štirih straneh)
- Oštevilčenje strani: z arabskimi številkami spodaj desno
- Dokument naj bo oblikovan brez prelomov strani
- Pisava:
  - Glavno besedilo: pisava Times New Roman, velikost 12 pt, obojestranska poravnava, razmak med vrsticami 1,5
  - Sprotne opombe: pisava Times New Roman, velikost 10 pt, obojestranska poravnava, razmak med vrsticami 1, oštevilčenje z arabskimi številkami

- Med odstavki naj ne bo razmaka ali praznih vrstic. Vsak odstavek (razen za podnaslovi, slikami, tabelami in izpostavljenimi daljšimi citati) naj se začne z zamikom prve vrstice za 1,25 cm.
- Naslov in podnaslovi naj bodo označeni (Headings), oblikovani polkrepko (bold) in z malimi tiskanimi črkami. Podnaslovov oz. (pod)poglavij ne številčite.

V besedilih se izogibajte podčrtovanju besed oz. delov povedi ter okrepljenemu in poševnemu tisku; s poševnim tiskom označite le navedene naslove knjig, časopisov in revij. Izpust znotraj citata označite s tropičjem v oglatih oklepajih […].

Knjižne ocene morajo imeti sestavine, ki si sledijo po naslednjem vrstnem redu: ime in priimek avtorja ali urednika knjige, ki je predmet ocene, naslov knjige, založba, kraj, leto izida, število strani. Besedilo naj obsega 5.000–10.000 znakov skupaj s presledki, na koncu sledita ime in priimek avtorja ocene.

4. Citiranje in sprotno navajanje virov

- Citati, krajši od petih vrstic, naj bodo v narekovajih in v pokončni pisavi (ne v kurzivi).
- Citati, dolgi pet ali več vrstic, naj bodo v posebnih odstavkih, zamaknjenih v levo za 1,25 cm, brez narekovajev ter v pokončni pisavi (ne v kurzivi).
- Viri naj bodo v besedilu navajani v skrajšani obliki, v celoti pa na posebnem seznamu v podpoglavju »Literatura« za glavnim besedilom (glej Točko 5). Avtorji naj tako pri sprotnem navajanju virov v besedilu kot pri oblikovanju seznama literature sledijo <u>7. verziji standardov Ameriškega psihološkega združenja (APA7)</u>.
- V besedilu naj bodo viri navajani v oklepajih, in sicer po sistemu (*priimek avtorja/naslov vira*, *letnica dela,* str. *stran oz. razpon strani*), pri čemer je lahko priimek avtorja oz. naslov vira, če avtor ni znan, naveden tudi izven oklepaja – npr. »kot navaja Anderson (2003, str. 19) …«.
- V primeru dveh avtorjev istega vira priimka ločimo z znakom ‚&' – npr. (Vah & Hacin, 2011).
- V primeru treh ali več avtorjev istega vira navedemo samo prvega avtorja in dodamo kratico ‚et al.' – npr. (Besozzi et al., 2009, str. 12).
- V primeru navajanja več virov naj bodo ti med seboj ločeni s podpičji in razvrščeni naraščajoče po letnicah izdaje – npr. (Vah & Hacin, 2011, str. 251–253; Hladnik et al., 2019).
- V primeru navajanja več virov istega avtorja iz istega leta letnicam dodamo male tiskane črke – npr. (Anderson, 2003a, 2003b).

5. Urejanje seznama literature

Revija *Dve domovini / Two Homelands* sprejema strukturirane oblike seznama literature v digitalnih formatih BibTeX, RIS in JATS XML. Za urejanje literature v digitalnih formatih priporočamo uporabo računalniških programov za upravljanje z referencami, kot so Zotero, EndNote, Mendeley, Citavi ipd., s pomočjo katerih lahko seznam v strukturirani obliki prenesete oziroma izvozite kot datoteko v enem izmed zgoraj navedenih formatov.

Če literature ne morete oddati v strukturirani obliki, upoštevajte spodnja pravila in primere. Seznam literature in virov naj bo v posebnem podpoglavju »Literatura« za glavnim besedilom. V seznamu literature naj bodo navedene vse in samo tiste enote, na katere se avtor sklicuje v besedilu. Enote naj bodo razvrščene po abecednem redu priimkov avtorjev (oziroma naslovov drugih virov, pri katerih avtorji niso znani), enote istega avtorja pa razvrščene po letnicah. V primeru več virov istega avtorja iz istega leta letnice posameznih enot označite z malimi tiskanimi črkami (npr. Ford, 1999a, 1999b). Posamezne enote naj bodo oblikovane z visečim zamikom (Hanging Indent) 1,25 cm, med njimi naj ne bo razmakov.

Samostojne vire (npr. knjiga, diplomska, magistrska ali doktorska naloga, film, videoposnetek, glasbeni album, neobjavljen rokopis) pišemo v ležeči pisavi (kurzivi), ostale vire, ki so del večje celote (npr. članek v reviji ali časopisu, poglavje v zborniku, spletna stran, poglavje v enciklopediji, objava v spletnem dnevniku), pa v običajni pisavi.

Polnopomenski elementi v angleških naslovih knjig in člankov se pišejo z veliko začetnico. Enote v seznamu literature naj vsebujejo naslov DOI (https://doi.org/...) ali katerega od drugih stalnih identifikatorjev (ARK, URN, Handle, URI), kjer je ta na voljo. Stalni spletni naslov je v bibliografski enoti vedno zadnji podatek (glej primere spodaj).

Primeri:

a) Knjiga:
    Anderson, B. R. (2003). *Zamišljene skupnosti: O izvoru in širjenju nacionalizma*. Studia Humanitatis.

    Besozzi, E., Colombo, M., & Santagati, M. (2009). *Giovani Stranieri, Nuovi Cittadini: Le Strategie di una generazione ponte*. FrancoAngeli.

b) Zbornik:
    Milharčič Hladnik, M., & Mlekuž, J. (ur.). (2009). *Krila migracij: Po meri življenjskih zgodb*. Založ-ba ZRC, ZRC SAZU. https://doi.org/10.3986/9789612541125

    Leitch, M. G., & Rushton, C. J. (ur.). (2019). *A new companion to Malory*. D. S. Brewer.

c) Poglavje v zborniku:
    Milharčič Hladnik, M. (2009). Naša varuška. V M. Milharčič Hladnik & J. Mlekuž (ur.), *Kri-la migracij: Po meri življenjskih zgodb* (str. 15–20). Založba ZRC, ZRC SAZU. https://doi.org/10.3986/9789612541125

d) Članek v reviji:
    Milharčič Hladnik, M. (2011). Šola kot institucija izenačevanja razlik v precepu multikulturne raznolikosti. *IB revija, 45*(1–2), 13–18.

    Dežan, L, & Sedmak, M. (2020). Policy and Practice: The Integration of (Newly Arrived) Migrant Children in Slovenian Schools. *Annales, Historia et Sociologia, 30*(4), 559–574. https://doi.org/10.19233/ASHS.2020.37

e) Članek v časopisu:
    Majovski, J. (2021, 9. marec). Testiranje za prehajanje meje ne bo plačljivo. *Primorski Dnevnik,* 5.
    Woodman, D., & Power, J. (2018, 16. maj). Internships have much to offer but provisions are necessary to ensure the young truly benefit. *The Australian*, 29.

    Carey, B. (2019, 22. marec). Can we get better at forgetting? *The New York Times*. https://www.nytimes.com/2019/03/22/health/memory-forgetting-psychology.html

f) Predstavitev na konferenci:
    Evans, A. C., Jr., Garbarino, J., Bocanegra, E., Kinscherff, R. T., & Márquez-Greene, N. (2019, 8.–11. avgust). *Gun violence: An event on the power of community* [predstavitev na konferenci]. Srečanje APA 2019, Chicago, ZDA. https://convention.apa.org/2019-video

g) Spletna stran:
    Lamovšek, T. (2020, 4. april). *Prišel, videl, spravil Slovence domov – Andrej Šter*. MMC RTV Slovenija. https://www.rtvslo.si/slovenija/prisel-videl-spravil-slovence-domov-andrej-ster/519439

    Kochhar, R. (2020, 9. junij). *Hispanic women, immigrants, young adults, those with less education hit hardest by COVID-19 job losses*. Pew Research. https://www.pewresearch.org/fact--tank/2020/06/09/hispanic-women-immigrants-young-adults-those-with-less-education-hit-hardest-by-covid-19-job-losses

    Quantum mechanics. (2019, 19. november). V Wikipedia. https://en.wikipedia.org/w/index.php?title=Quantum_mechanics&oldid=948476810

Dodatni primeri za druge vrste virov so na voljo na spletni strani https://apastyle.apa.org/style--grammar-guidelines/references/examples.

6. Grafične in slikovne priloge

- Preglednice oz. tabele naj bodo narejene v programu Microsoft Word in vključene v besedilo. Oblikujte jih čim enostavneje (zanje ne uporabljajte posebnih slogov).
- Vseh drugih prilog (slike, zemljevidi, ilustracije, grafi ipd.) **ne** vključujte v besedilo.
- Vse preglednice, tabele in fotografije morajo biti označene v besedilu (npr. Tabela 1, Slika 1). Točno lokacijo v besedilu navedite po naslednjem vzorcu: ... (Slika 1) ... (Preglednica 1).
- Vse preglednice in drugo slikovno gradivo mora imeti pripis, ki naj se vedno začne z naslovom Slika/Preglednica (in zaporedna številka), npr.:

    Slika 1: Kuharica Liza v New Yorku leta 1905 (avtor: Janez Novak, vir: Arhiv Slovenije, 1415, 313/14)

    Preglednica 1: Število prebivalcev Ljubljane po popisu leta 2002 (vir: Statistični urad RS, *Statistične informacije*, 14).

- Pripisi k slikam in preglednicam naj ne vsebujejo opomb.
- Datoteke slikovnega gradiva poimenujte s priimkom avtorja in zaporedno številko gradiva, npr. ,Novak1.jpg', ,Novak2.jpg' itd.
- Velikost slike naj bo takšna, kot bo natisnjena, ali večja. Fotografije naj bodo v enem od naslednjih formatov: TIF, EPS, SVG, JPG, PNG v polni kakovosti in s tipografijami v krivuljah. Ločljivost slik naj bo najmanj 300 dpi.
- Za grafične in slikovne priloge, za katere nimate avtorskih pravic, morate dobiti dovoljenje za objavo in uredništvu predložiti dokazilo.

Instructions for Authors Preparing English Articles for Publication in *Dve domovini / Two Homelands*

For the latest version of instructions for authors, please refer to website https://ojs.zrc-sazu.si/twohomelands/prispevki.

1. Editorial Content

Dve domovini / Two Homelands welcomes scientific and professional articles and book reviews from the humanities and social sciences focusing on various aspects of migration and related phenomena. Established in 1990, the journal is multidisciplinary and publishes articles in Slovenian or English. Two volumes are published annually in print and online digital format (https://ojs.zrc-sazu.si/twohomelands).

Articles should be prepared according to the instructions below and sent to the editorial board at the e-mail address dd-th@zrc-sazu.si. All articles undergo a peer-review procedure. Authors are responsible for language and style proficiency. Manuscripts accepted for publishing by the editorial board should not be sent for consideration and publishing to any other journal. By publishing their articles in *Dve domovini / Two Homelands*, the authors also grant permission to publish them online.

2. English Article Elements

The length of the entire article can be up to 45,000 characters with spaces (including the References section) and should contain the sections below in the following order:

- Article Title (Title Case, bold): should be clear and concise and include the article's keywords.
- Name and surname of the author. The surname should be followed by a footnote with the following four elements, each separated by a semicolon:
    - o the author's education (e.g., PhD in history);
    - o the author's affiliation – Institution, Department, City (e.g., ZRC SAZU, Slovenian Migration Institute, Ljubljana);
    - o e-mail address;
    - o ORCID ID.
- Type of contribution (original, review, or short scientific article)
- Abstract: up to 700 characters with spaces (will be translated into Slovenian by the journal)
- Keywords: up to 5 words
- Main text: divided into sections and subsections, if necessary
- Information about the project or funding (if the article was written as part of a project) and any acknowledgments by the author(s) (optional)
- Reference list (References): see point 5 below for instructions
- Summary: up to 3,000 characters with spaces (will be translated into Slovenian by the journal)

3. Document Formatting

- The style of the entire text should be "Normal" – no formatting, defining styles, or similar.
- Please use American English spelling (Merriam-Webster Dictionary) and serial (Oxford) commas.
- Page margins: "Normal" (2.5 cm margins at all sides)
- Page numbering: Arabic numerals, bottom right
- The document should not contain any page breaks.
- Font
    - o Main text: Times New Roman, 12 pt, justified, line spacing 1.5
    - o Footnotes: Times New Roman, 10 pt, justified, line spacing 1, Arabic numerals

- There should be no spacing or blank lines between paragraphs. Each paragraph (except those after subtitles/headings, figures, tables, and long quotations) should begin with a first-line indent of 1.25 cm.
- The Title and Section (Sub-section) headings should be manually formatted: The Title and Level 1 Headings are bold, Title Case; Level 2 Headings are bold, Sentence case. Headings should not be numbered.

Avoid underlining words or parts of sentences, as well as using bold and italics. Italics should be used only when citing titles of artworks, books, newspapers, and journals. Indicate omitted parts of a citation with square brackets and an ellipsis […].

Book reviews should contain the following elements in the order given: name and surname of the author or editor of the book, title of the book, name of publisher, place of publication, date of publication, and number of pages. Reviews should be 5,000–10,000 characters with spaces and include the name and surname of the reviewer at the end.

4. Quotations and In-Text Citations

The following instructions should be followed for citing sources in the text:
- Quotations shorter than five lines should be included in the main text and separated with quotation marks in normal font (not italics)..
- Long quotations (five lines or more) should be formatted in a separate paragraph indented by 1.25 cm, without quotation marks, in normal font (not italics).
- Sources should be cited in abbreviated form in the text and in full in a separate list in the "References" section after the main text (see Section 5). Both for in-text citations and the reference list, authors should follow the 7th edition of the American Psychological Association (APA) standards (APA7).
- Cite sources using In-Text Author-Date citations in parentheses: *author's surname*, *year of publication*: *page number(s)*. Examples:
    - o citing a single source: (Anderson, 2003, pp. 91–99);
    - o citing a source with two authors: surnames separated by "&", e.g. (Vah & Hacin, 2011);
    - o citing a source with more than two authors: the surname of the first author followed by "et al.", e.g. (Besozzi et al., 2009, p. 12);
    - o citing multiple sources: sources separated by semicolons and sorted by the year of publication in ascending order (Hladnik, 2009, p. 15; Vah & Hacin, 2011, pp. 251–253; Hladnik et al., 2019);
    - o citing multiple works by the same author published in the same year: years marked with lowercase letters (Anderson, 2003a, 2003b).

5. Reference List

Dve domovini / Two Homelands accepts structured reference lists in digital formats BibTeX, RIS, and JATS XML. For editing the reference list in digital formats, we recommend the use of reference management software such as Zotero, EndNote, Mendeley, Citavi, etc., which can be used to download the list in a structured format or to export the list as a file in one of the abovementioned formats.

If you are unable to provide the reference list in one of the abovementioned formats, please follow the rules and examples below:

A list of references should appear after the main text in a separate section named "References". The reference list should include all and only those sources that are cited and referred to in the text. The entries should be arranged alphabetically by the authors' surnames (or titles of newspapers/articles or other sources where authors are unknown), with multiple references by the same author arranged by year of publication. Multiple references by a single author published in the same year should be separated with lowercase letters (e.g., Ford, 1999a, 1999b). Each entry should be formatted with a hanging indent of 1.25 cm, with no line spacing between entries.

Titles of self-contained and independent sources (e.g., a book, a master's thesis, a PhD dissertation, a film, a video, a music album, or an unpublished manuscript) should be in italics. Other sources that are part of a larger work (e.g., an article in a magazine or newspaper, a chapter in a collection of papers, a website, a chapter in an encyclopedia, or a blog post) should be written in normal font.

English book and article titles (except conjunctions, articles, and prepositions) should be capitalized in Title Case. The entries in the reference list should contain DOI addresses (https://doi.org/...) or any other persistent identifier such as ARK, URN, Handle, or URI when available. The permanent web address is always the last information in a reference entry (see examples below).

a) Book:
Anderson, B. R. (2006). *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. Verso.

Besozzi, E., Colombo, M., & Santagati, M. (2009). *Giovani Stranieri, Nuovi Cittadini: Le Strategie di una generazione ponte*. FrancoAngeli.

b) Edited book / Collection of articles:
Leitch, M. G., & Rushton, C. J. (Eds.). (2019). *A New Companion to Malory*. D. S. Brewer.

Moran, A. & O'Brien, S. (Eds.). (2014). *Love Objects: Emotion, Design and Material Culture*. Bloomsbury Academic. https://doi.org/10.5040/9781474293891

c) Chapter in an edited book / Article in a collection:
Armstrong, D. (2019). Malory and Character. In M. G. Leitch & C. J. Rushton (Eds.), *A New Companion to Malory* (pp. 144–163). D. S. Brewer.

Mihaylova-Garnizova, R., & Garnizov, V. (2018). Refugee Crisis As a Potential

Threat to Public Health. Defence Against Bioterrorism. In V. Radosavljevic, I. Banjari & G. Belojevic (Eds.), *NATO Science for Peace and Security Series A: Chemistry and Biology* (pp. 25–42). Springer. http://dx.doi.org/10.1007/978-94-024-1263-5_4

d) Journal article:
Scruton, R. (1996). The Eclipse of Listening. *The New Criterion, 15*(3), 5–13.

Dežan, L, & Sedmak, M. (2020). Policy and Practice: The Integration of (Newly Arrived) Migrant Children in Slovenian Schools. *Annales, Historia et Sociologia, 30*(4), 559–574. https://doi.org/10.19233/ASHS.2020.37

e) Newspaper article:
Carey, B. (2019, March 22). Can We Get Better at Forgetting? *The New York Times*. https://www.nytimes.com/2019/03/22/health/memory-forgetting-psychology.html

Woodman, D., & Power, J. (2018, May 16). Internships have much to offer but provisions are necessary to ensure the young truly benefit. *The Australian*, 29.

Majovski, J. (2021, March 9). Testiranje za prehajanje meje ne bo plačljivo. *Primorski Dnevnik,* 5.

f) Conference presentation:
Evans, A. C., Jr., Garbarino, J., Bocanegra, E., Kinscherff, R. T., & Márquez-Greene, N. (2019, August 8–11). *Gun violence: An event on the power of community* [Conference presentation]. APA 2019 Convention, Chicago, IL, United States. https://convention.apa.org/2019-video

g) Website:
Price, D. (2018, March 23). *Laziness Does Not Exist*. Medium. https://humanparts.medium.com/laziness-does-not-exist-3af27e312d01

Kochhar, R. (2020, June 9). *Hispanic women, immigrants, young adults, those with less education hit hardest by COVID-19 job losses*. Pew Research. https://www.pewresearch.org/fact-tank/2020/06/09/hispanic-women-immigrants-young-adults-those-with-less-education-hit-hardest-by-covid-19-job-losses

Quantum mechanics. (2019, November 19). In *Wikipedia*. https://en.wikipedia.org/w/index.php?title=Quantum_mechanics&oldid=948476810

Additional examples for other types of sources are available at https://apastyle.apa.org/style-grammar-guidelines/references/examples.

6. Graphics and Illustrations

- Tables should be created in Microsoft Word and included in the text. Use simple formatting (no special builtin styles).
- All other figures (pictures, maps, illustrations, graphs, etc.) should **not** be included in the text but should be sent as separate files.
- All figures and tables should be referenced in the main text, e.g. (Table 1), (Figure 1).
- Please add the figure captions at the exact locations where they should appear in the text.
- All tables and other visual material should be captioned, always starting with the title Figure/Table [number], for example:

    Figure 1: Lisa the Cook in New York in 1905 (Photo: Janez Novak, source: Archives of Slovenia, 1415, 313/14).

    Table 1: The population of Ljubljana according to the 2002 Census (source: Statistical Office of the Republic of Slovenia, *Statistics*, p. 14).

- Captions to visual material should not include footnotes.
- All digital files for visual material should be named with the author's surname and numbered, e.g., "Brown01.jpg", "Brown02.jpg".
- The size of images should be the same as they should appear in print or larger. Photos should be submitted in one of the following formats: TIF, EPS, SVG, JPG, PNG in full quality and fonts in curves. The image resolution should be at least 300 dpi.
- Permission to publish must be obtained for all copyrighted graphic and illustrative material. Please include proof of permission alongside the copyrighted visual material you submit to the editor.