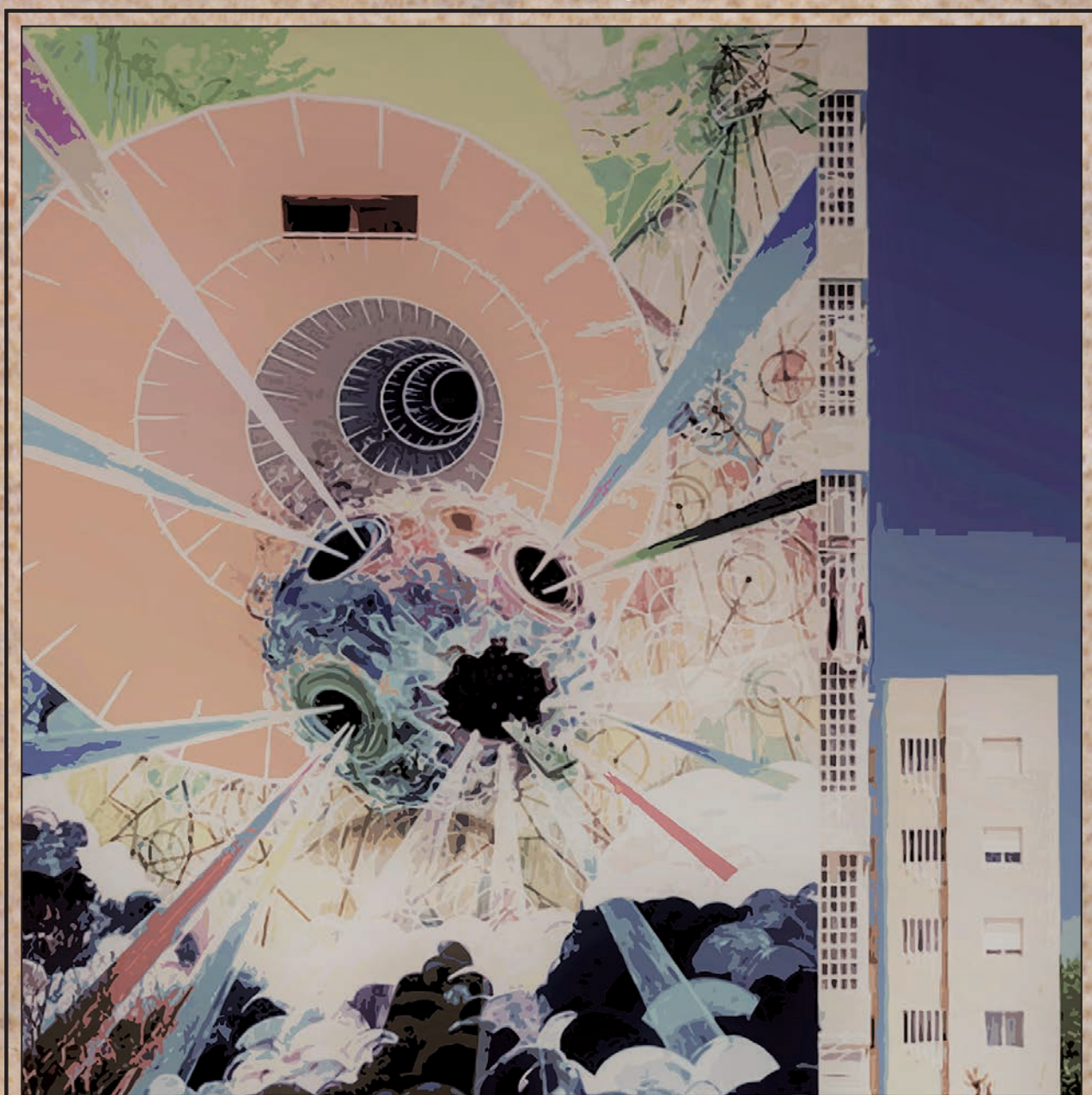


ANNALES

Anali za istrske in mediteranske študije
Annali di Studi istriani e mediterraneei
Annals for Istrian and Mediterranean Studies
Series Historia et Sociologia, 34, 2024, 4





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Anali za istrske in mediteranske študije
Annali di Studi istriani e mediterraneei
Annals for Istrian and Mediterranean Studies

Series Historia et Sociologia, 34, 2024, 4

ISSN 1408-5348
e-ISSN 2591-1775

UDK 009

Letnik 34, leto 2024, številka 4

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Založništvo PADRE d.o.o.

Založnika/Editori/Published by:

Zgodovinsko društvo za južno Primorsko - Koper / *Società storica del Litorale - Capodistria*® / Inštitut IRRIS za raziskave, razvoj in strategije družbe, kulture in okolja / *Institute IRRIS for Research, Development and Strategies of Society, Culture and Environment* / *Istituto IRRIS di ricerca, sviluppo e strategie della società, cultura e ambiente*®

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SI-6000 Koper/Capodistria, Garibaldijeva/Via Garibaldi 18
e-mail: annaleszdjp@gmail.com, **internet:** https://zdjp.si

Redakcija te številke je bila zaključena 16. 12. 2024.

**Sofinancirajo/Supporto finanziario/
Financially supported by:**

Javna agencija za znanstvenoraziskovalno in inovacijsko dejavnost Republike Slovenije (ARIS)

Annales - Series Historia et Sociologia izhaja štirikrat letno.

Maloprodajna cena tega zvezka je 11 EUR.

Naklada/Tiratura/Circulation: 300 izvodov/copie/copies

Revija *Annales, Series Historia et Sociologia* je vključena v naslednje podatkovne baze / *La rivista Annales, Series Historia et Sociologia* è inserita nei seguenti data base / *Articles appearing in this journal are abstracted and indexed in:* Clarivate Analytics (USA): Arts and Humanities Citation Index (A&HCI) in/and Current Contents / Arts & Humanities; IBZ, Internationale Bibliographie der Zeitschriftenliteratur (GER); Sociological Abstracts (USA); Referativnyi Zhurnal Viniti (RUS); European Reference Index for the Humanities and Social Sciences (ERIH PLUS); Elsevier B. V.: SCOPUS (NL); Directory of Open Access Journals (DOAJ).

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received: 2024-03-02

DOI 10.19233/ASHS.2024.27

URBAN DESIGN AND ARTISTIC PERSPECTIVES IN PLACEMAKING: THE CASES OF POLHOGRAJSKI DOLOMITI AND KRAPAN

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ABSTRACT

This paper compares early-stage placemaking activities in Polhograjski Dolomiti Landscape Park, Slovenia, and Krapan, Croatian Istria. Placemaking is defined as a transformative process that fosters belonging, identity, and community engagement. The study focuses on the analytical stage, using surveys, interviews, observations, and artistic research-based practices such as mapping historical contexts and community interactions to understand existing conditions, historical significance, cultural context, and community needs. It contrasts the urban design-based approach in Slovenia with engaged artistic practices in Croatia, revealing how different methods influence placemaking outcomes. The research highlights the importance of interdisciplinary collaboration and local context understanding to create inclusive, vibrant and sustainable communities.

Keywords: *placemaking, community bonds, urban design, engaged artistic practice, comparative analyses*

PROGETTAZIONE URBANA E PROSPETTIVE ARTISTICHE NEL PLACEMAKING: I CASI DI POLHOGRAJSKI DOLOMITI E KRAPAN

SINTESI

Questo articolo confronta le attività di placemaking nelle prime fasi nel Parco Paesaggistico dei Dolomiti di Polhograjski, Slovenia, e a Krapan, Istria croata. Il placemaking è definito come un processo trasformativo che favorisce il senso di appartenenza, identità e coinvolgimento della comunità. Lo studio si concentra sulla fase analitica, utilizzando sondaggi, interviste, osservazioni e pratiche di ricerca artistica come la mappatura dei contesti storici e delle interazioni comunitarie per comprendere le condizioni esistenti, il significato storico, il contesto culturale e le esigenze della comunità. Confronta l'approccio basato sulla progettazione urbana in Slovenia con le pratiche artistiche partecipative in Croazia, rivelando come i diversi metodi influenzino i risultati del placemaking. La ricerca evidenzia l'importanza della collaborazione interdisciplinare e della comprensione del contesto locale per creare comunità inclusive, vivaci e sostenibili.

Parole chiave: *placemaking, legami comunitari, progettazione urbana, pratica artistica partecipativa, analisi comparative*

INTRODUCTION¹

Placemaking, viewed as a dynamic approach within urban planning and design, has gained global recognition for its transformative impact on places and its role in strengthening community bonds. This study delves into the multifaceted dimensions of placemaking, examining collaborative processes involving residents, artists and urban planners, as well as the resulting social impacts on community cohesion and well-being. Our exploration extends to the architectural, artistic and social components that characterize placemaking endeavours, with a focus on understanding how they contribute to the development of more vibrant, inviting and sustainable places.

The primary objective of the study is a comprehensive analysis of the initial phase of the placemaking process – the analytical stage, recognized as the foundational starting point for successful placemaking initiatives. This phase is widely acknowledged as the critical base point upon which successful placemaking endeavours are constructed, or not (Low, 2016). Montgomery's work (2013), particularly his book "Happy City", emphasizes the importance of early-stage analysis in placemaking. He argues that by understanding the historical, cultural, and social context of a place, we can create public spaces that are more meaningful and responsive to the needs of the community.

By concentrating on this crucial stage, our research aims to dissect two distinct approaches ingrained in two disciplines – urban design in the Slovenian case and engaged artistic practice in the Croatian case. While urban design and engaged artistic practice both aim to shape and enhance public spaces, they employ distinct methodologies. Urban design often focuses on the physical planning and design of urban environments while addressing the needs of the users, it involves a systematic and often technical approach, incorporating elements such as functional planning, stakeholders' involvement and aesthetic considerations (Sternberg, 2000). Surveys and statistical analysis are often used to assess the needs and preferences of communities. On the other hand, engaged artistic practice is a more interdisciplinary approach that involves artists working collaboratively with communities to create meaningful and transformative places. It emphasizes community participation, social and cultural engagement, and experiential and participatory design (Berman, 2018). Engaged artists often employ qualitative research methods, such as interviews, focus groups and ethnographic observation, to understand the

lived experiences and perspectives of communities. Their work is often characterized by its site-specific nature, incorporating local history, culture and materials.

Within this framework, we seek to uncover the underlying forces and motivations driving the initiation of placemaking efforts, providing insights into the cultural and historical factors that shape these endeavours. Additionally, our study aims to scrutinize collaborative dynamics among diverse stakeholders, such as residents, artists, designers and government bodies, and to examine the establishment of goals and objectives during these early stages. Last but not least, the two case studies used in the paper illustrate the state of the art in the non-urban environments, which we call remote places and define as the places of communities with a relatively small population size and limited infrastructure. There have been increasing calls in recent placemaking discourse highlighting that urban-centric approaches receive significant attention, while places outside urban areas are much less addressed (Balassiano & Maldonado, 2015; Hill et al., 2021). While there is no precise numerical definition, these places often have populations ranging from a few dozen to a few thousand inhabitants. Additionally, places are considered remote when they are geographically isolated or situated away from major urban centers or transportation hubs (Nikšič & Goršič, 2024). In both, Slovenia and Croatia, which serve as case studies, remote places may include mountainous and hilly regions, rural villages or communities located far from major roads or public services, while residents of remote locations often face challenges such as limited access to amenities, services and economic opportunities.

THEORETICAL BACKGROUND: PLACEMAKING FOR FOSTERING COMMUNITY BONDS AND TRANSFORMING SPACES TO PLACES

Placemaking in general is a multifaceted approach to urban planning and design that has gained increasing recognition for its profound impact on community bonds and the transformation of urban spaces (Ellery & Ellery, 2019; Rapanta et al., 2021; Fingerhut & Alfasi, 2023). This practice, which prioritizes the active involvement of residents and other stakeholders in shaping their environments, serves as a powerful catalyst for creating vibrant, inclusive, and sustainable communities. At its core, placemaking is about turning ordinary spaces into extraordinary places, nurturing a deep sense of attachment to the environment (Pancholi et al., 2015).

¹ The authors acknowledge the financial support from the Slovenian Research Agency (research core funding No. P5-0100) and co-financing from the Creative Europe programme, Human Cities – Smoties project (2020–2024).

Placemaking emphasizes the need to transform spaces into welcoming, engaging, and functional places. This transformation process involves a collaborative effort between urban planners, architects, artists, and, most importantly, the local community.

According to Lew (2017), placemaking can be classified into three main types: mixed, planned, and organic. Mixed placemaking combines elements of planned and organic approaches, while planned placemaking is more top-down and involves deliberate interventions by authorities or developers. Organic placemaking, on the other hand, emerges naturally from the grassroots efforts of communities. Lew's notion importantly points out the significance of understanding the cultural and social dimensions of placemaking, emphasizing that successful placemaking efforts must consider the unique identities and needs of the communities involved.

One of the primary ways placemaking enhances the quality of urban life is by creating spaces that encourage social interaction (Toolis, 2017). Public venues such as squares, community gardens and other forms of places for socialisation are examples of areas where people can come together, exchange ideas and build relationships. By providing these communal spaces, placemaking cultivates a stronger sense of belonging and a shared identity among residents (Cilliers & Timmermans, 2014). When people engage with their surroundings, they become more invested in their community, which fosters a sense of pride and unity (Dash & Thilagam, 2023). Additionally, placemaking enhances the overall well-being of residents. Access to aesthetically pleasing, well-maintained public spaces has been linked to improved mental health, reduced stress and increased physical activity (Couper et al., 2023). When spaces are transformed into inviting and safe environments, people are more likely to engage in common activities, thereby promoting physical and mental health. This, in turn, can lead to a stronger sense of community, as residents come together to enjoy these shared amenities (Gallou, 2022; Ellery et al., 2021).

Placemaking is instrumental in bridging social and generational gaps and fostering inclusivity too (Sutton & Kemp, 2002). When communities actively participate in the design and development of their public spaces, they can cater to the needs and preferences of various social and age groups. This creates a harmonious environment where people from different walks of life can interact, learn from one another, and develop a shared sense of identity.

Economically, placemaking also offers considerable benefits. Attractive and vibrant public spaces can attract business activities, tourism flow and keep property values (Kelly et al., 2017; Vodačević Lukić, 2021). Local businesses often benefit from

the increased number of visitors, and communities may see long-term economic growth as a result. In the context of the renewal of the built environments, placemaking can also be a catalyst for revitalizing neglected or declining neighbourhoods. When people are engaged in the process of reshaping their surroundings, they become more invested in their community's future (Toolis, 2021). This involvement can lead to greater social cohesion, increased pride in the neighbourhood, and the motivation to tackle various issues that the local community is facing.

Placemaking, extending beyond conventional design paradigms, emerges as a transformative force shaping the essence of community bonds and lived spaces. This multifaceted approach, integrating perspectives from architecture, urban design, urban planning and the arts, actively contributes to the development of resilient, inclusive and vibrant communities (Aelbrecht & Arefi, 2024). Architects and urban designers lend expertise in shaping physical structures and integrating aesthetics, while urban planners align initiatives with broader development goals (Ellery et al., 2021).

Artistic approaches, introducing a unique dimension, foster creativity and cultural expression in the transformation of spaces (Bentz & O'Brien, 2019). Research-based art practices, a subset of artistic approaches, offer a particularly powerful tool for fostering creativity and cultural expression – by combining artistic inquiry with rigorous research, these practices can generate new knowledge and perspectives that inform the design and implementation of transformative urban interventions (Collier, 2001; Hannula et al., 2014). Research-based art practices propose original conceptions of art and knowledge in which cognition and aesthetics mutually converge, giving rise to emancipatory modes of knowledge production and to innovative languages of art (Leavy, 2020). They do not produce new sets of dogma but initiate dialogues rendered even more necessary by the indeterminacy thus created. This larger and more open framework leaves to the viewer the responsibility to re-appropriate and consolidate the new forms of knowledge it generates (Ha Thuc, 2022). On the other hand, engaged art practice is based on subversive, analytical and critical questioning representation of social and political conditions, institutions and values within existing circumstances. And always existing as an observation tool, especially in the case of site-specific art practice, a visual anthropological approach in which the interpretations of history are given a new fresh perspective on a state of art. An outstanding example of artistic practices is the utopian concept of Social Sculpture by Joseph Beuys from 1973 (Jordan, 2013), defining society as an area for artistic action. Its artistic thought is based on: (1) the emancipatory activism of Fluxus; (2) the theoretical analysis of society established in

European critically oriented conceptual art; (3) the social, economic and spiritual theory of the spiritual evolution of humanity, founded by anthroposophist Rudolf Steiner; (4) the critical neo-leftist practices of German neo-anarchism of the 1960s and 70s; and (5) ideas from alternative environmental green movements (Šuvaković, 2005).

Within artistic research, narratives expressed through symbolic gestures, words, or actions that hold sequence and meaning for the community play an important role in the placemaking discourse. Fisher (1987) speaks of narratives in the theory, stating that humans are primarily storytelling creatures. We depend on them – stories shape our history, culture, and character. There are stories we adopt, which then become part of our culture. Additionally, Julian Rappaport's (1998) thesis addresses narratives as the starting point for individual and collective identity, initiating social changes. Narratives create memory, meaning, and identity among individuals, as well as their expressions within the social and cultural context. In turn, the social context is constructed by individuals who create rituals, performances, activities, and symbols in language, art, and daily routines. Rappaport (1998) concludes from the proposed theory that psychologists, sociologists and other professionals understanding the reciprocity and systematic creation of cultural context and individual identity can participate as collaborators along with artists, writers, and other social activists and citizens in pursuit of a common interest in social change.

The dynamic interplay among previously mentioned approaches to placemaking becomes evident in their varied methodologies, collectively forging environments that prioritize spatial coherence, integrated functionality and cultural richness (Fokdal et al., 2021). Ultimately, placemaking empowers residents to play an active role in shaping their surroundings, cultivating stronger connections and a profound sense of belonging, emphasizing the enduring impact of people-centred design processes in an ever-evolving world (Carmona, 2021). In the upcoming chapter, we will delve into specific case studies from Slovenia and Croatia, examining the disciplinary approaches of urban design and artistic interventions in placemaking. The Slovenian case predominantly adopts an urban design perspective, leveraging spatial strategies to enhance community bonds. In contrast, the Croatian case centres around artistic approaches, showcasing how engaged art practices contribute to the transformation of spaces into meaningful and/or authentic places. Both approaches however are interdisciplinary in their core. By examining these two distinct approaches, we aim to highlight the collaborative efforts of urban design and the arts in placemaking.

THE ANALYTICAL APPROACHES IN PLACEMAKING PROCESS - TWO CASE STUDIES

The case studies come from two distinctive areas in central Europe – Landscape park *Polhograjski Dolomiti* in Slovenia and the area of *Krapan* in Croatia. To understand the context within which the placemaking activities took place, we first shortly describe the setting of the two areas. We then describe into details how the two places undergone a different approach in the analytical phase of the placemaking process, i.e. urban design and engaged artistic practice approach.

As it will be described later on, both cases employed mixed-methods. In Landscape Park *Polhograjski Dolomiti*, the approach was based on historical, geographical, social and economic analysis to understand the broader context within which placemaking activities occurred. Historical analysis were conducted to trace the region's evolution, geographical analysis to assess its physical characteristics, social and economic analysis to study demographic trends and economic activities, and surveys to provide the opinions of residents. Also, interviews of selected local residents, community leaders and experts to gather their perspectives were implemented. In *Krapan*, a more engaged artistic practice approach was undertaken, emphasizing community involvement and participatory methods through art. The ethnographic observations revealed community's lived experiences, engaging in dialogue with residents and practicing collaborative art projects provided a platform to analyse the residents' lived experiences of their community. In *Krapan*, historical and spatial data were studied too to understand the town's context and challenges.

Landscape park *Polhograjski Dolomiti*, Slovenia

The setting

Located west of Ljubljana, Slovenia, Landscape Park *Polhograjski Dolomiti* is a hilly region characterized by forested peaks, narrow valleys and dispersed villages. The area has a long history of agricultural use, with traditional farmers cultivating orchards, practicing forestry and engaging in beekeeping.

The earliest settlements in the region date back to the 12th and 13th centuries, when farmers established small villages and independent farms surrounded by agricultural lands. The cultivation of fruit trees and forests played a crucial role in the local economy, providing sustenance and supporting trade (Vičar, 2020; Perpar & Udovč, 2012).

The region's landscape has evolved significantly over time, influenced by factors such as industrialization and urbanization in the nearby lowlands – the



Figure 1: The hilly landscapes of Landscape Park Polhograjski Dolomiti with scattered villages (Source: UIRS Smoties archive).

growth of cities and the rise of personal motorization led to a shift towards suburban living, attracting new residents to the area (Čepič et al., 1998). Today, Landscape Park Polhograjski Dolomiti is also a popular recreational destination, offering opportunities for hiking, cycling, and nature appreciation.

Mapping Polhograjski Dolomiti: An exploration of attitudes towards heritage for the contemporary reinvention

The placemaking challenges encountered in the Landscape Park Polhograjski Dolomiti revolve around the nuanced transition from an agricultural landscape to an area that accommodates the needs of (sub)urban residents too while preserving its rich historical agricultural traditions and natural attractions. This evolution necessitates a delicate equilibrium between upholding the region's agricultural legacy and its built heritage and embracing the conveniences introduced by its proximity to neighbouring urban centres. The challenge lies in integrating historical agricultural practices with contemporary needs, striving to perpetuate the essence of its past while cultivating a dynamic present that caters to both residents and visitors seeking a fusion of traditions and natural beauty with the needs of contemporary (sub)urban life.

As the ultimate goal of placemaking endeavours in Polhograjski Dolomiti was to improve the social interaction among various user groups in the area by reinventing and promoting cultural heritage (Human Cities – Smoties, 2024), the analytical mapping of the assets followed the concept of place attachment developed by Scannell and Gifford (2010), which proposed three main subdimensions of place (attachment) – namely person, place and process. The “person” refers to the levels of attachment that individuals and groups feel towards the features constituting the place. The “place” highlights the physical, social and economic aspects of this attachment, encompassing the specific features, significance and spatial elements related to the social or physical (built and natural) reality. Lastly, the “process” delves into the mental processes involved in forming a bond with a place, encompassing cognitive aspects and emotional connections.

To comprehend the material and immaterial assets present in the landscape, data-driven urban design analytics have been instrumental. This involved using quantitative and qualitative data to understand the state of the art of the environments. By leveraging data from various sources, such as census data, geographic information systems (GIS), and citizen surveys, urban design analytics provided valuable insights into population dynamics, land use patterns,

transportation networks, infrastructure, economic activity and social equity.

Heritage mapping was an important analytical tool too. It involved the identification, documentation and analysis of historic and cultural resources of the analysed area. It began by identifying significant buildings, structures, landscapes and also cultural practices. Information about these resources, including their history, significance and physical characteristics, was assessed to identify any threats or deterioration. Analysing the relationship between the resources and their surrounding environment, including the social, cultural and economic context was seen as an important preparation for the later-on implemented contextual design to ensure that new developments or interventions respect and respond to the historical and cultural fabric.

This approach aimed for a nuanced understanding of the physical, social and cultural dimensions of the area. In concrete terms, the following activities were conducted in Polhograjski Dolomiti from 2021-2023 (Human Cities - Smoties, 2024), in two phases:

- In the first phase, a comprehensive assessment of the area's assets was conducted. This involved a thorough review of written resources, such as historical documents, professional expertise reports and fieldwork mapping. Additionally, survey was distributed among residents by email and on-site interviews were conducted with key local figures identified as significant contributors to cultural, educational or economic activities (including agriculture and hospitality). Decision-makers, such as municipal representatives, local self-management structures and representatives from local associations (e.g. the tourist board) and cultural sphere were also interviewed to gather valuable insights;
- In phase two, public events to gather insights from a broader audience regarding the assets identified in phase one were organised. Various public events, including thematic gatherings, community-led walks (so called *Sprehosad*), roundtable discussions and hands-on workshops, provided opportunities to bring together different users of the area, both residents and visitors alike. The aim was to collaboratively explore potential place-making interventions that would enhance the area's assets and reinvent rich material and immaterial heritage by preserving them rather than causing harm, while simultaneously improving the quality of local life. The focus was on creating a positive and enriching user experience for visitors too.

The mapped assets

These activities have brought forth both tangible and intangible heritage and traditions, contributing significantly to the (re)invention of the contemporary identity of the place. Several assets have been revealed:

- Local meadows: The local meadows are a cherished asset of this remote place, providing a scenic beauty that enhances the overall aesthetic appeal of the region. These grasslands not only contribute to the visual charm but also serve as important ecosystems supporting diverse flora and fauna. The meadows offer a serene environment for relaxation and recreation, making them a valuable resource for both locals and visitors alike. Additionally, they play a crucial role in maintaining ecological balance, promoting biodiversity, and serving as potential spaces for sustainable agricultural practices.
- Local orchards: The presence of local orchards stands as a significant asset for this remote place, representing a rich source of agricultural diversity and economic sustenance. These orchards not only contribute to the region's visual appeal with blooming trees and fruits but historically also supported the local economy through fruit production and trade. The orchards still nowadays represent a connection to the land and its agricultural heritage, providing fresh and seasonal produce that reflects the unique flavours of the region. Moreover, they contribute to a sense of community identity, as the cultivation and harvesting of orchard fruits often involve shared traditions and practices.
- Local forests: The local forests are invaluable assets for this remote place, offering a plethora of ecological, recreational, cultural and economic benefits. These wooded areas contribute to environmental sustainability by their biodiversity. The forests also provide recreational opportunities for locals and visitors, serving as natural playgrounds for activities such as hiking, bicycling, birdwatching or simply contemplating. Moreover, they hold cultural significance as they may contain historic sites, indigenous knowledge and traditional practices that connect the community to its roots, as well as provide economic substance.
- Local built heritage and identity by architectural design: The local built heritage and architectural identity of the remote place represent a unique and irreplaceable asset. The traditional built structures such as homesteads, drywalls and other farming facilities such as hayracks

and fruit driers tell the story of the community, reflecting its history, cultural values and craftsmanship, as well as directly reflect the traditional way of living in these remote places as it once was. Preserving and celebrating the local architecture not only maintains a sense of continuity with the past but also fosters a distinct identity for the region. Historical buildings and structures can serve as landmarks, attracting visitors and contributing to the local economy. Furthermore, the architectural heritage serves as a reminder of the skills and traditions passed down through generations.

- Local food production traditions: The local bread-making and other food production traditions such as fruit-growing and cheese production are vital assets of the remote place, representing a culinary heritage. These traditions encompass not only the preparation of food but also the cultivation of ingredients and the sharing of recipes that have been passed down through generations. Local bread-making traditions, for instance, contribute to a sense of community and identity, as they often involve communal efforts and shared rituals. The resulting food products, whether bread, cheese, or other specialties, become symbols of local pride and can contribute to the gastronomic diversity that defines the region.
- Local art and culture activities: The presence of local art created by community collectives is a cultural asset that adds vibrancy and creativity to the remote place. These art collectives and cultural venues (such as *Hiša na hribu*, *Pr' Lenart*) provide a platform for local artists to express themselves, fostering a sense of community and collaboration. The art produced reflects the unique perspectives and experiences of the region, contributing to a distinctive cultural identity. Additionally, these art initiatives can serve as catalysts for economic development, potentially attracting tourists interested in exploring the local arts scene. Even more importantly, the artistic endeavours of local collectives also strengthen social bonds and create a supportive environment for the flourishing of creativity within the community.

The activities unveiled two of the three primary subdimensions of place, as previously discussed in the model presented by Scannell and Gifford (2010) – encompassing both the physical spaces and the individuals with significant connections to them. Subsequently, these analytical endeavours laid the foundation for the subsequent development of a placemaking process.

The placemaking activities after the mapping phase: Bringing a variety of users together

In 2023, based on the mapping phase described above, the intensive phase of placemaking activities started. Even if the mapping phase already embedded various encounters with and among the users of the place (i.e. residents and visitors), this phase aimed to strengthen the assets that were pointed out in the mapping phase and strengthen the bonds among users.

Building upon the intensive phase of placemaking activities initiated in 2023, various initiatives have been launched to fortify the identified assets and enhance community bonds. Local orchards, serving as repositories for traditional fruit-tree varieties, were challenged as places that not only contribute to the conservation of local biodiversity but can also evolve into (semi)public spaces fostering community engagement. The incorporation of art interventions, exemplified by the construction of large nests from locally sourced materials, imbued the orchards with a unique cultural dimension blending nature and art. Similarly, recognizing local forests as potential public spaces promoted contemplation and self-reflection within the community. Paying tribute to local inhabitants, underscored by the inherent connection between people and their natural surroundings, emphasizes were put into local forests as integral components of the community's identity. Their role as public spaces for locals and visitors to meet was comprehended through the community walks. Moreover, the renovation and repurposing of built heritage in the area was tested as a means to breathe new life into historical structures – an old farm storage house, a traditional double-hayrack and drywall were transformed into inviting public spaces by simple reconstruction or embedment of new cultural purpose (e.g. art exhibitions, cultural venue). Additionally, the promotion of traditional bread-making has emerged as a catalyst for communal activity, fostering social interaction and shared experiences. Beyond the act of baking, it established a cause for community members to gather, creating a cultural bridge that brings people together around a common practice and symbolizes unity and connection in the community. Furthermore, the co-creation of distinctively designed tablecloths by the community has evolved into an artistic practice extending beyond mere aesthetics. This initiative played a crucial role in establishing social public spaces through collaborative art projects. The process of designing tablecloths became a shared experience, emphasizing the importance of community engagement and cultural expression in shaping the identity of the locale.

These initiatives not only preserved the historical and cultural elements of the region but also provided spaces for socialization and artistic expression. They pointed



Figure 2: *Co-design of Community Tablecloth as a means to bring various users of the area of Polhograjski Dolomiti area around the common table (Source: UIRS Smoties archive).*

out local assets and how they can collectively contribute to the reinvention of the contemporary identity of Landscape Park Polhograjski Dolomiti, blending historical traditions with modern development and fostering a vibrant, inclusive and harmonious living environment.

Krapan, Croatia

The setting

Krapan is a former mining town located in the Istrian peninsula of Croatia. Situated in a deeply carved canyon, the town's infrastructure was developed to support coal mining operations (Milevoj, 1997; Matošević, 2011).

The mining of "pegola nera" (black coal) began in Krapan during the Venetian Republic and expanded significantly under Austro-Hungarian rule. The Rothschild banking family became involved in the mine's ownership in the 19th century, leading to further development and the construction of a mining settlement (Bojić, 2018).

Krapan has a rich ethnic history, reflecting the region's diverse past. Historically, the town was home to a mix of Croats, Italians and other ethnic groups,

including ones from Yugoslav times. This diversity was shaped by the region's political and cultural influences over the centuries (Simonetti, 2007; Istarski ugljenokopi, 2023).

The town's significance as a mining center declined in the 20th century due to various factors, among others the rise of other mining centers and the closure of the local mine in the 1990s. The subsequent development of Krapan has been influenced by its historical association with mining and its proximity to larger urban centers (Cvjetičanin, 2015; NN broj 153/2009, 2023).

Mapping Krapan: Artistic research-based practice

The point of entry into the Krapan community occurred during the implementation of the Underground City XXI project in 2010, while mapping former entrances to the mines in the Labin area of the *Istarski ugljenokopi Raša* (Vorano, 2005). An extremely dire situation could be found there – Krapan residents were living in extremely dilapidated buildings, squatting in their own homes and surrounding spaces, left to maintain and adapt the area to their own needs



Figure 3: The setting of Krapan in Istrian landscape as presented on a historic map (Source: State Archive Pazin).

through their own efforts and means. From the outset and throughout further interactions, research and the long-term presence in the community, a conflict crystallised between the urban historical context and the social reality, which, under the given circumstances, had acquired pathological characteristics that directly reflected the lives, health, identity and integrity of Krapan residents.

The town of Krapan faced multifaceted challenges deeply intertwined with its history and socio-economic transformations. Established during the Austro-Hungarian period around coal mining, Krapan's placemaking hurdles are notably tied to its economic decline after the industry's collapse which led to economic instability, social exclusion and environmental degradation. Community involvement was hindered due to marginalized residents and limited control over town planning.

The initial human and artistic impulse was triggered by shock, disbelief, and a reflexive reaction to the encountered situation. As the idea to engage with the community developed, the collaborative conceptual focus centered on irreconcilable societal contradictions. Krapan epitomized decay and

the failure of major economic-political and energy-economic ideas based on resource exploitation. The concept of social, ecological, and other forms of justice was reduced to absurdity. Therefore, a research-based artistic approach seemed appropriate to map the state of art.

The historical maps overview was the first form of mapping spatial defaults and a display of Krapan's historic layers, after which it was easily possible to establish the main cause of the space's formation. An exceptional historical pattern of different economic-political models and philosophies embedded in the fabric of space forced the conclusion that Krapan originated and persisted over time solely due to geo-strategic and economic interests running through different states, based on the exploitation of primary energy resources. The emergence and collapse of Krapan were conditioned by the same reasons. In that sense, Krapan stands out as an example of the rise and fall of one of the most significant resource energy paradigms (Cvjetičanin, 2015).

As this was a complex situation regarding Krapan residents, that had developed over many years through the subtle, long-term establishment

of an atmosphere of intimidation and a sense of hopelessness, they gradually accepted the position of victims, becoming “prisoners” of extremely unfavourable living conditions in legal, physical, and psychological senses. Thus, understanding the context in which a space was formed and the way life developed within it, became the initial position of an artistic investigative practice and visual-anthropological diagnosis. Space exploration began by valuing industrial heritage, diagnosing the existing condition, residing in the community and engaging in conversation. The design, programme and activities spontaneously followed the development of relationships with the local community through mutual acceptance, leading to content development working in and with the community, involving participative and inclusive content creation processes in later phases.

The mapped assets

Through conversations with Krapan residents about their life stories and circumstances, and by analysing the living conditions, a coherence in narratives communicating the needs, necessities, and demands of municipal authorities was observed but not recognised as such. The narrative of frustration and, ultimately, rebellion was personalised and segmented in its approach to power instances, which might not be seen as a problem of citizens as a whole or could simply be intentional or accidental segmentation of interests or ignorance on the other side of the communication channel.

However, the mapping of Krapan’s assets revealed a rich tapestry of tangible and intangible resources that can contribute to the community’s regeneration. Tangible assets include abandoned mine structures and machinery, historical mining infrastructure, abandoned buildings, and public spaces. These elements offer opportunities for creative reuse, revitalization, and community development.

Intangible assets encompass oral histories, cultural practices, community networks, and resilience. Documenting the stories and experiences of former miners and their families uncovered valuable historical knowledge. It also showed that existing community networks can be strengthened through building new connections that support residents and create opportunities for collaboration.

Despite the post-mining legacy, environmental assets were found in Krapan too, including the surrounding landscape, which offers potential for recreational activities, ecological restoration, and sustainable energy production. These opportunities were recognized as potential economic assets, including existing or potential tourism activities, small businesses, or agricultural ventures.

The placemaking activities after the mapping phase: Engaged artistic practice approach as a catalyst for community transformation

The placemaking challenges were thus to highlight the town’s potentials and struggles facing institutional resistance and subsequent community disengagement. This seemed to be most appropriately addressed through cultural interventions focusing on empowering the community, sustainable revitalization, collaborative governance and preserving cultural heritage. Krapan’s challenges underscored the necessity for a community-centric approach to placemaking, emphasizing inclusive urban planning that respects its identity while addressing socio-economic, environmental and cultural issues.

As a result of living within the community of Krapan, initiating dialogues, conducting interviews, and after intensive acquaintance with all aspects of community life, the historical, geographical and economic timeline of Krapan development, taking into account the current situation as well, Krapan inhabitants were stating hopelessness referring to inadequate living conditions, and these were the important starting points for the placemaking activities that took place after the initial mapping phase in the form of the artistic engaged practice.

Artistic engaged practices took place from 2011 to 2021, leading to the establishment of the platform “Artists’ Recruitment Canters – Pozzo Franz”, implemented through the artistic organization Polygon – Centre for research and project development in culture. The resulting content was emancipatory in its nature. The references, more than models and approaches, are numerous artistic practices, perhaps most significantly the utopian concept of Social Sculpture by Beuys (Jordan, 2013), in the sense that social change is realized through social sculpture, arising from a radical extension of art into social life. The narrative was placed at the centre of attention as a method and a common starting point, creating a shared front in relation to local power instances, articulating problems in a broader societal context, and fostering a space of trust and dialogue.

By initial mapping and studying the perception aspects of wider community in relation to Krapan and its residents, including media coverage thematically related to the locality, the narrative shaped the general impression of Krapan in an even harsher way, creating an extremely negative image of a dangerous and neglected place, and above all unimportant place where undesirable “others” live. Therefore, one of the first artistic conceptions and articulated artistic actions undertaken in Krapan, entitled “To whom it might concern?” dealt with the articulation of the problems of a community which,



Figure 4: Underground City XXI – mapping the ex-coal mine localities, 1st visit to Krapan, Polygon collective, Krapan 2011 (Source: POZZOFRANZ, 2023).

due to the confluence of life circumstances in a micro-locational context, as well as the confluence of transitional political turmoil in the regional, national and global context, found themselves in the limb of the decline of one of the largest industries in this area. The artistic work and action included the production of postcards of Krapan.²

As part of the same action, the public “square” Pozzo Franz was stated as a place for joint gathering and public accessibility. In this way and by

simple gesture of placemaking, the social plasticity was achieved. Social plasticity refers to the ability of social systems to adapt and change in response to internal and external pressures (Levinthal & Marino, 2015). Here, the artistic intervention aimed to reshape perceptions and connections within the wider community. By changing connections (ArtHist.net, 2023), the intervention influenced thoughts, narratives, perceptions, and consequently, behaviours. Each subsequent action

² The following text was put on the postcard: “Attn: to whom it might concern? Re: People are Heritage. Krapan is the first Polygon Recruit Center for the Artists. Artists are taking part in sharing a destiny with people of Krapan by taking role of a Krapan citizen and recruiting other citizens for their art practice” (FACEBOOK, 2023).

implied the production of a space in a different way that would allow focusing on concepts related to a critical position and general engagement from different perspectives, which, articulated through artistic and cultural practices, expanded the space of understanding topics related to social inequalities and the ecology of care.

In that sense, previously mentioned social sculpturing as well as other contemporary engaged art references were influences and inspirational sources for artistic conceptualisation in all further community activities conducted within Krapan community, setting up a common ground of equalizing the roles of participants in a way that each person is an artist in his own way of bringing their thoughts, experiences, knowledge, hopes, aspirations and expectations into the open collaborative space(making). Artistic decisions upon the media (e.g. performance, exhibition, poetry, reading sessions, live act interventions) of expression and/or the final outputs, is just about navigating social mechanics and atmosphere toward, in advance established, common betterment.

In addition, and further developments, there are many exciting topics on transformative effects the commune had upon socio-spatial relations. On the other hand, artistic work, especially when it comes to engaged artistic practices and work in and with the community, does not carry evaluations based on success criteria. This type of artistic practices sensitizes society and neuralgic points, and the measurability of "success" is an inapplicable category in evaluating this type of artistic activity. What happens through this mode of action in the context of placemaking is the appropriation of space as it is embedded in our bodies and our language. In that way, inhabitants are not only historical sequence of higher powers but those who are integrated in the authenticity of space.

In this sense, the artistic act is a reflection of authenticity, which helped that Krapan and its inhabitants, at least legally, cannot be left out of the testament in all further processes of development and production of space, and that, at least in an art expression, the theoretical primacy of history over geography, and the dominance of time over space, was limited by engaged actions.

DISCUSSION

Exploring the distinctive trajectories of Polhograjski Dolomiti and Krapan provides various insights into the challenges and successes encountered in their respective placemaking processes. In this section, we delve into a comparative overview of these cases, shedding light on the historical, socio-economic contexts, placemaking strategies, community

involvement, implications for urban planning and design, lessons learned, and the interdisciplinary nature that underlies their successes.

Historical and socio-economic contexts

In Polhograjski Dolomiti, the evolution from an agricultural landscape to a suburban and recreational area reflects the broader societal shifts influenced by industrialization, suburbanization and personal motorization. The transformation from traditional farming practices to a blend of suburban and rural living poses challenges in maintaining a delicate equilibrium between preserving historical agricultural traditions and embracing modern developments. This echoes Antrop's (2004) general observations on landscape changes in Europe as a whole where transformation of rural landscapes into suburban and recreational areas is omnipresent.

On the other hand Krapan's historical trajectory, rooted in organized coal exploitation, presents a unique narrative shaped by different political regimes – from the Venetian Republic to Austro-Hungarian rule, Mussolini's era, and later socialist Yugoslavia. These regimes have contributed to the subsequent challenges faced by Krapan today, including economic decline, social exclusion, and environmental issues, with the highlighted complex interplay between historical events and the place's development and decline to the day. This reminds us of Anckar & Fredriksson's (2019) comprehensive analysis of political regimes over a long historical period and the importance of understanding the political contexts when placemaking activities take stage. By examining different political regimes, it was important to gain insights into how various political influences, from the Venetian Republic to socialist Yugoslavia, shaped Krapan's development.

Placemaking strategies

The placemaking strategies in Polhograjski Dolomiti emphasize the careful integration of historical agricultural practices with modern development. The mapping phase, guided by the concept of place attachment, allowed for a comprehensive understanding of material and immaterial assets. Subsequent placemaking activities, such as the follow-ups of Sprehosad walks focused on strengthening identified assets like local meadows, orchards, forests, built heritage, local food production traditions, as well as art and culture activities. Similarly, as Zwiers et al. (2018) observed, the community's efforts to integrate historical agricultural practices with modern development must reflect a balance between change-oriented

attachment (embracing new developments) and stability-oriented attachment (preserving historical traditions) for the success of placemaking.

In Krapan, detailed artistic research helped to establish an engaged and critical artistic discourse, which further served to develop and implement narratives directed towards instances of power and consequently resulted in the improvement of the community's living conditions. The placemaking process took space as a narrative and reshaped the framing which afterwards became an integrative part of narration for people who live in Krapan. By promoting industrial cultural heritage together with the fact that the Krapan citizens are keepers of the heritage as well, the local political instances had to take into consideration new circumstances. This aligns with Ellery et al. (2021) theoretical understanding of placemaking, which emphasizes the importance of a common understanding of place-making processes to effectively measure the impact on community development. Their work highlights how placemaking can serve as a powerful tool for community empowerment and transformation, as seen in Krapan.

Additionally, community involvement in Polhograjski Dolomiti is evident through the two-phased approach, involving local actors, decision-makers and the broader public in mapping activities and activities triggering the mapped assets. As Antrop concluded back in 2004, challenges lie in reconciling the area's agricultural legacy with the demands of (sub)urban residents, striking a balance that preserves the past while embracing contemporary living. Krapan's challenges, deeply rooted in its history and socio-economic transformations, have hindered community involvement. The shift from coal mining to a post-industrial reality, coupled with unstable socio-economic status of the residents, poses multifaceted challenges, thus the artistic engagement in Krapan becomes a response to institutional resistance, fostering a space of trust, dialogue and the creation of a new narrative.

Implications for urban planning and design

While the experience in Polhograjski Dolomiti underscores the importance of contextual design, heritage mapping and collaborative placemaking to maintain a balance between past traditions and modern development, Krapan's case highlights the need for a community-centric approach in placemaking. In Polhograjski Dolomiti the positive and enriching user experience resulting from the placemaking activities reinforces the potential for integrating historical practices with contemporary challenges of the area, at the same time in Krapan the artistic interventions serve as a catalyst for

social change, emphasizing the role of artists, social activists and citizens in addressing socio-economic challenges. The platform's goals align with inclusive urban planning that respects the place's identity and addresses its unique issues while strongly rooted in the distinctive local circumstances and heritage. Both cases also clearly underline and approve the observation by Jelenski (2018) on the importance of heritage in developing successful urban planning and design strategies and interventions.

Lessons learnt

The insights gleaned from the Polhograjski Dolomiti case underscore the success of a transition from traditional agricultural landscapes to a contemporary blend of agricultural and suburban living, all while preserving heritage. This success is attributed to the fundamental involvement of the community from the very start – a meticulous mapping process, and the cultivation of positive user experiences. These lessons learned propel future directions, advocating for the continued exploration of sustainable development practices and fostering ongoing collaboration with local stakeholders from early stages of the process on. Notably, Polhograjski Dolomiti's experience reveals an interdisciplinary approach where urban design serves as the foundational methodology, yet it extensively incorporates artistic practices.

Conversely, Krapan's narrative, propelled by artistic engagement, highlights the transformative potential in addressing the complex contemporary challenges faced by areas undergoing identity shifts. The lessons derived from Krapan underscore the significance of narratives, community empowerment and the role of social sculpture in reshaping the identity of a place. Looking forward, future directions for Krapan involve the potential expansion of similar programs to other regions grappling with comparable issues, advocating for broader systemic changes. In the case of Krapan, the foundational methodology was rooted in artistic practices, showcasing an interdisciplinary approach that draws from urban design principles.

Both cases illuminate the importance of interdisciplinary and transdisciplinary cooperation. The successful outcomes in Polhograjski Dolomiti and Krapan demonstrate that the synergy between urban design, artistic interventions and other disciplines is instrumental in creating vibrant and culturally rich urban spaces. This collaboration not only enhances the aesthetic and functional aspects of the built environment but also fosters a holistic understanding of the diverse challenges and opportunities inherent in placemaking. The interdisciplinary

Table 1: Comparative presentation of the placemaking aspects of the two case studies.

	Landscape Park Polhograjski Dolomiti (Slovenia)	Krapan (Croatia)
Historic background	Evolution from agricultural landscape upgraded with suburban and recreational area features, influenced by industrialization and (sub)urbanization	Shaped by coal exploitation, transitioning through different political regimes (Venetian Republic, Austro-Hungarian, Mussolini's era, socialist Yugoslavia)
Economic and social setting	Balancing traditional farming practices with modern development	Economic decline, social exclusion and environmental issues post the collapse of the mining industry
Approaches to placemaking	Emphasis on integrating historical agricultural practices with modern development. Activities focus on bringing people together by appreciating the local heritage and assets such as meadows, orchards, forests, traditional architecture, local food production traditions, art and culture	Art research-based practice, as well as visual anthropology and engaged art practices emphasise on integration of industrial heritage, critical artistic discourse and community participative models as well as creating a new narration directed toward instances of power and advocating necessary change
Community engagement and hurdles	Two-phased approach involving local figures, decision-makers and the broader public in mapping and placemaking activities. Challenges in reconciling the area's agricultural legacy with (sub)urban demands	Challenges rooted in historical and socio-economic transformations hinder community involvement. Artistic engagement responds to institutional resistance, fostering trust, dialogue and a new narrative
Implications for urban planning and design	Importance of contextual design, heritage mapping and collaborative placemaking to balance past traditions with modern development. Positive user experience reinforces potential for integrating historical practices with contemporary (sub)urban living needs	Need for a community-centric approach in placemaking. Artistic interventions serve as a catalyst for social change, aligning with inclusive urban design that respects identity and addresses unique issues
Key takeaways	Insights into potentially successful co-habitation of agricultural to suburban culture while preserving heritage. Importance of engaging the community in comprehensive mapping and fostering a positive user experience	Transformative power of artistic engagement in addressing complex urban challenges. Significance of narratives, community empowerment and potential of social sculpture. Future directions involve expanding similar programs and advocating for broader systemic changes

nature of these initiatives emphasizes the need for a comprehensive and collaborative approach that goes beyond traditional disciplinary boundaries, ultimately contributing to the sustainable development and resilience of communities.

CONCLUSION

The comparative analysis between Landscape Park Polhograjski Dolomiti and Krapan brings to light the diverse approaches in placemaking within the Central European context. Placemaking, as explored in the theoretical background, emerges as a multifaceted approach to urban planning and design, demonstrating its profound impact on community bonds and the transformation of urban spaces. Rooted in the active involvement of residents and stakeholders, in both cases placemaking serves as a catalyst for creating vibrant, inclusive and sustainable communities. The essence of placemaking

lies in fostering a profound connection to the environment and transforming spaces into welcoming, engaging and functional places that hold significance for users of different walks of life.

The discussion of two case studies from Slovenia and Croatia further enriches our understanding of placemaking processes. In the Slovenian case of Polhograjski Dolomiti, a predominantly urban design perspective is adopted, leveraging spatial strategies to enhance community bonds. The case emphasizes the careful integration of historical agricultural practices with modern development, showcasing the importance of contextual design, heritage mapping and collaborative placemaking to maintain a balance between past traditions and contemporary challenges. Lessons learnt from Polhograjski Dolomiti underscore the importance of community engagement, comprehensive mapping and fostering a positive user experience, pointing towards

future directions involving sustainable development practices and continued collaboration with local stakeholders. On the other hand, the Croatian case centers around artistic approaches, showcasing how creative interventions contribute to the transformation of spaces into meaningful places. It transcends traditional artistic boundaries and aligns with the place's challenges. Krapan's experience, driven by artistic engagement, highlights the transformative potential of art in addressing complex contemporary challenges of areas in the process of changing identity. Krapan case stresses the significance of narratives, community empowerment and the role of social sculpture in reshaping a place's identity. In both cases, the historical and socio-economic contexts play a pivotal role in shaping the placemaking strategies and an initial understanding of this context is key to its final success.

Both cases demonstrate community involvement and challenges. In Polhograjski Dolomiti, active participation in mapping activities is evident, and challenges revolve around reconciling agricultural legacies with contemporary living. In Krapan, challenges are rooted in historical and socio-economic transformations, hindering community involvement. Consequently, artistic engagement serves as an intervention, responding to institutional resistance – this

fosters a space for trust, dialogue and the creation of a new narrative, while also seeking a systematic approach to address the accumulated challenges. Implications for urban planning and design emphasize the need for contextual design, heritage mapping and collaborative placemaking in maintaining a balance between past traditions and modern development, as seen in Polhograjski Dolomiti. In Krapan, the need for a community-centric approach in placemaking is evident, with artistic interventions serving as a catalyst for social change. The positive user experience resulting from placemaking activities reinforces the potential for integrating historical practices with contemporary challenges in Polhograjski Dolomiti, while in Krapan artistic interventions contribute to reshaping the place's identity.

The comparative analysis of Landscape Park Polhograjski Dolomiti and Krapan enhances our understanding of placemaking as a transformative force that shapes community bonds and lived spaces. It underscores the necessity of an interdisciplinary and transdisciplinary approach to placemaking, placing significant importance on people-centred analytical design processes. This approach, when applied in practice, has the potential to contribute to the development of more resilient, inclusive and vibrant communities.

URBANISTIČNO OBLIKOVALSKI IN UMETNIŠKI PRISTOP K USTVARJANJU PROSTORA: PRIMERA POLHOGRAJSKIH DOLOMITOV IN KRAPNA

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POVZETEK

Članek obravnava proces ustvarjanja prostora, ki ga strokovnjaki imenujejo tudi placemaking. Avtorja analizirata, kako proces poteka na dveh konkretnih primerih: v Krajinskem parku Polhograjski Dolomiti v Sloveniji in v kraju Krapan na Hrvaškem. Ustvarjanje prostora obravnavata kot dinamičen proces, ki spodbuja pripadnost ljudi svojemu okolju, krepi njihovo identiteto in jih spodbuja k aktivnemu sodelovanju v sooblikovanju svojega življenjskega prostora. Prispevek se osredotoča na začetno fazo tega procesa, ko se zbirajo informacije o obstoječem stanju, zgodovini, kulturi in potrebah lokalne skupnosti z različnimi metodami, kot so ankete, intervjuji, opazovanja in umetniške prakse. Pri tem primerjata dva različna pristopa: urbanistični pristop, ki je bolj značilen za slovensko lokacijo, in umetniški pristop, ki je bolj izrazit na hrvaški lokaciji. Urbanistični pristop se osredotoča na načrtovanje in oblikovanje fizičnega prostora, medtem ko umetniški pristop prinaša v proces ustvarjanja prostora več kreativnosti in sodelovanja lokalne skupnosti. Primerjava pripelje do ugotovitve, da oba pristopa, čeprav se zdita na prvi pogled različna, prispevata k skupnemu cilju – ustvarjanju bolj prijetnega in živega okolja. Študija tudi poudarja, da je za uspešno ustvarjanje prostora ključno razumevanje lokalnega konteksta. To pomeni, da je treba upoštevati zgodovino kraja, njegove naravne danosti, potrebe prebivalcev in njihove vrednote. Poleg tega je pomembno tudi sodelovanje različnih akterjev, kot so urbanisti, arhitekti, umetniki, lokalni prebivalci in druga zainteresirana javnost. Primera Polhograjskih Dolomitov in Krapna prikazujeta, kako je mogoče s pomočjo ustvarjanja prostora oživiti tradicionalno dediščino, okrepiti občutek pripadnosti in izboljšati kakovost življenja v lokalnih skupnostih in s tem ponujata dragocene vpoglede za vse, ki se ukvarjajo z načrtovanjem in oblikovanjem bivalnih okolij.

Ključne besede: ustvarjanje prostora, skupnostne vezi, urbanistično oblikovanje, angažirana umetniška praksa, primerjalne analize

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received: 2024-03-02

DOI 10.19233/ASHS.2024.28

ABOUT DINOSAURS AND CHAMELEONS, OR THE REPRESENTATIONAL ROLE OF MUSEUMS: PLACE-HOLDERS FOR WHAT, FOR WHOM AND UNDER WHICH CIRCUMSTANCES?

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ABSTRACT

Taking the International Council of Museums (ICOM) recently revised museum definition by its word, this essay reflects on the history of the museum's representational role to consider possible ways forward to implement its new emphasis on inclusivity and community participation. Drawing mainly on institutional critique, new museology, and decolonial thought, two curatorial approaches are analysed that could lead the way towards a placemaking approach to museology: artist's José Miguel González Casanova's curatorial project Jardín de Academus [Garden of Academus] (2011) at the Museo Universitario de Arte Contemporáneo (MUAC) in Mexico City, and the curatorial approach of the first co-directors of the Museu de Arte Moderna do Rio de Janeiro (MAM-RJ) Pablo Lafuente and Keyna Eleison.

Keywords: museums, representation, curatorial, *placemaking*, socially engaged art, inclusivity, community participation

DINOSAURI E CAMALEONTI, OVVERO IL RUOLO RAPPRESENTATIVO DEI MUSEI: COSA, PER CHI E IN QUALI CIRCONSTANZE?

SINTESI

Prendendo spunto dalla definizione di museo recentemente rivista dall'International Council of Museums (ICOM), questo saggio riflette sulla storia del ruolo rappresentativo del museo per considerare le possibili vie da percorrere per implementare la sua nuova enfasi sull'inclusività e la partecipazione della comunità. Attingendo principalmente alla critica istituzionale, alla nuova museologia e al pensiero decoloniale, vengono analizzati due approcci curatoriali che potrebbero aprire la strada verso un approccio "placemaking" alla museologia: il progetto dell'artista José Miguel González Casanova, Jardín de Academus [Giardino di Academo] (2011) presso il Museo Universitario de Arte Contemporáneo (MUAC) a Città del Messico e l'approccio curatoriale dei primi co-direttori del Museu de Arte Moderna do Rio de Janeiro (MAM-RJ), Pablo Lafuente e Keyna Eleison.

Parole chiave: musei, rappresentazione, curatoriale, *placemaking*, arte socialmente impegnata, inclusività, partecipazione comunitaria

INTRODUCTION

If there is one institution in the art world that has been fiercely criticised for over half a decade, it is the museum. Continuously accused of not being up to date (a dinosaur),¹ of misrepresenting or not representing at all,² of silently sitting on bad old decisions from imperial and colonial times³ or of collaborating with shady funders or having suspect board members while preaching democracy, inclusiveness, and human rights (a chameleon),⁴ there seems to be little margin for museums today to get things right. In this scenario, in which criticism towards the institution will most surely come, it seems to be only a matter of time and format. As I will be discussing throughout this essay, much of this criticism is and has been related to what we expect the museum's role to be in society, and when thinking about this question it is impossible not to address the museum's representational role. In this sense, I ask: for what and in consequence, for whom, should the museum hold space for? And especially, under which circumstances? Or, taking on the questions from artist José Miguel González Casanova posed in the context of his curatorial project *Jardín de Academus. Laboratorios de Arte y Educación* [Garden of Academus. Art and Education Laboratory] (2011) at the Museo Universitario de Arte Contemporáneo (MUAC) in Mexico City: "[...] if art is a system of representation, who do the artworks represent? Who produces them and who reads them? If art creates collective identity spaces, which identities gather around it, and which are the signs that identify them?" (González Casanova, 2011, 12).⁵

What this essay then, aims to reflect upon, is the museum's potential as place-holder for precisely these collective meaning-making and identity pro-

cesses, discussing how socially engaged art practice and decolonial curatorial approaches could lead to long-lasting changes in the way the museum uses its representational power by holding space for community participation.

Although claiming that the museum is a contested representational space is far from being a new idea (Anderson, 1983; Karp & Lavine, 1991; Hall, 1997; Vergo, 1997; Mignolo, 2011; Bennett, 1995), these questions continue to be relevant today. As curator Mahret Ifeoma Kupka has recently once more underlined: "Museums are in crisis. To be relevant, as sites of encounter, cultural education, and joy, in constantly transforming societies, they need to change" (Kupka, 2023). Although Kupka's work focuses particularly on the restitution of looted African objects and artefacts from former colonies, her diagnosis is timely in a much broader and ongoing discussion around the definition, mission, and relevance of museums today. Indeed, it was just very recently, in August 2022, that the International Council of Museums (ICOM) adapted its definition of what a museum is – and should be, now officially recognising "the importance of *inclusivity, community participation* and sustainability" (ICOM, 2022, my emphasis). Therefore, if inclusivity and community participation are now acknowledged as key to the development of museological practice, what possibilities does the institution have to make these two aspects central pillars to their work?

The first part of the essay will consist of a short historical overview about the complex history of the museum's representational role, leading to the conclusion that this institution has been the target of ongoing criticism for almost about a century – although with increased pressure from the 1980's onwards. The second part will then focus on two curatorial case

1 Cf. for example one of the first and most well-known critical artist's statements against the museum: Ad Reinhardt's *How Modern is the Museum of Modern Art?* (1931), in which the artist demands that MoMA shows more contemporary US artists and not just art from the archive. After this, a large number of artists working within and in the tradition of institutional critique, such as conceptual and performance artists, especially during the 1960's and '70s, called out art institutions and their representational power as a political act in itself. Such are, for instance, the Fluxus Group, Situationism in Europe, Allan Kaprow, feminist art in the US, and Latin American Conceptualism. The museum (as well as other established places for the circulation and commodification of artworks such as galleries) is discussed, attacked, ignored, reinvented, and metaphorically destroyed through different artistic proposals, destabilising the until then predominant understanding of the museum as an (archival) object-based collection and compulsory exhibition space.

2 One of the most well-known examples in this respect is the work of Guerrilla Girls, an anonymous feminist artist activists collective exposing gender as well as ethnic bias', discriminatory policies and corruption in the art world through disruptive headlines, statistics, and visuals.

3 Cf., for instance, the ongoing debates about the restitution of human remains and looted objects from formerly colonised territories.

4 The Free Palestine/Strike MoMA action organised in 2021 is one such example. Among the critique that this letter addressed towards the institution, the following stands out: "With figures like Lauder, Crown, and Tananbaum on its board, MoMA cannot pretend to stand apart from the attack on Gaza or the Occupation of the West Bank and Jerusalem more broadly. Because the corporate power and wealth that sits atop the museum suffuses all of its operations, there are no clean hands. Given these entanglements, we must understand the museum for what it is: not only a multi-purpose economic asset for billionaires, but also an expanded ideological battlefield through which those who fund apartheid and profit from war polish their reputations and normalize their violence" (Social Text Journal Online, 2021).

5 My translation from the original in Spanish: "Si el arte es un sistema de representación, a quién representan las obras? quién las produce y quién las lee? Si el arte conforma espacios de identidad colectivos, qué tipo de identidades se reúnen en su entorno y cuáles son los signos que las identifican?" (González Casanova, 2011, 12).

studies that might indicate possible ways forward to start thinking about museums as active placemakers within society. The first example will be González Casanova's already mentioned curatorial project *Jardín de Academus. Laboratorios de Arte y Educación* (2011) at MUAC in Mexico City, which worked with thirty-one socially engaged artistic projects; while the second example will be the first co-directorship of the Museu de Arte Moderno in Rio de Janeiro (MAM-RJ) since its reopening in 2020 by two curators, Pablo Lafuente and Keyna Eleison. By looking at these two curatorial approaches, I will argue that contemporary socially engaged art practice and decolonial approaches to curating and institutional directorship carry the potential to facilitate community participation and inclusivity to positively redefine the museum's (not only representational) role.

ABOUT DINOSAURS AND CHAMELEONS

When speaking about the museum's representational role, it seems necessary to start by recalling what art historian Carol Duncan has taught us. In her understanding, museums can be:

[...] powerful identity-defining machines. To control a museum means precisely to control the representation of a community and some of its highest, most authoritative truths. It also means the power to define and rank people, to declare some as having a greater share than others in the community's common heritage – in its very identity. [...] What we see and do not see in our most prestigious art museums – and on what terms and whose authority we do or don't see – involves the much larger questions of who constitutes the community and who shall exercise the power to define its identity. (Duncan, 1991, 102)

It is against the backdrop of this knowledge that I would like the reader to follow the argument I will develop throughout the next few pages. If acknowledging that the museum holds a privileged power position in terms of defining, negotiating, and delimiting a people's identity and sense of belonging (or not) to a community (and as we will see, this is a power that has historically been used as a mechanism of control, invisibilisation, and othering), the question is what options it has at hand to change these dynamics today. It is in this sense – of signalling an acknowledgment of the long history of power abuse and exclusion on part of this institution in Western art history – that I use the terms 'dinosaur' and 'chameleon' to speak about

a concept of museum (and its corresponding museological practices) that no longer serves the societies we live in today. On the one hand, the term 'dinosaur' refers to a disapproval of a structure that in most cases has not managed to keep up and respond to the present reality in a meaningful way – a certain slowness or even resistance to change that leads to a perceived inadequacy with the times. The 'chameleon', on the other hand, describes an institution that changes its standing points as it seems convenient in their own interest without having a strong core of public values and objectives that benefit its community and that are coherently defended throughout its programmings and decisions.

From a Western art historical perspective, museums have been considered the public institution of the welfare state that carries the responsibility to collect, preserve and exhibit a nation's heritage. Parting from Monika Sommer's analysis of the museum's history (cf. Sommer, 2013), in which she identifies three key moments in the West's narrative that can be considered the birthing moment of this institution as we know it today – Hellenistic Antiquity, the cabinets of curiosities during the Renaissance, and if we speak about the modern museum, the Louvre and the French Revolution – curator and educator Nora Sternfeld proposes a fourth such moment. In her view, we cannot speak about the museum without acknowledging the constitution of the International Council of Museums, better known as ICOM, following the Second World War in 1946 (Sternfeld, 2018, 40–41). As Sternfeld emphasises, it was only through the formation of this association, which is tightly linked to UNESCO, that a transnational definition of the museum first took place and continued to be negotiated throughout regular conferences (Sternfeld, 2018, 40–41). As might already have become clear, these four proposed constitutive moments of the museum overlap with moments in history that are closely related to the history of the West as told by the foundational myths and the West's self-understanding as 'civilisation' (Sternfeld, 2018, 41), a notion certainly drenched with problematic associations. In 2011,⁶ for instance, Walter Mignolo, scholar at the forefront of the modernity/coloniality working group, argued that museums did not only have "a particular role to play in the colonization of knowledge and of beings" (Mignolo, 2011, 71), but what seems much more important in this context: that they continue to do so today. In one of his first essays on artistic decolonial approaches, an analysis on Fred Wilson's *Mining the Museum* (1992) at the Maryland Historical Society, Mignolo recalls Franz Boas' ethnographic museum and how,

⁶ This is the same year in which José González Casanova asked the questions mentioned in the beginning of this essay and curated *Jardín de Academus* at MUAC.

in the metropolis, museums were divided into two types. On the one hand, the museums that focused on building Europe's history and identity (Roman and Greek history being the forebearers) and on the other hand those that told the history of the 'Other' – essentially everything that was considered external to Europe's self-understanding. As Mignolo highlights, this included, first and foremost, the histories of the colonised territories, but also that of the Chinese, who although never colonised by Europe were considered strangers (Mignolo, 2011, 73). Art museums, as we know them today, are, as Mignolo stresses, the epitome of those that built European history (Mignolo, 2011, 73). It is in this sense that museums (along with universities) must be understood as part of the central institutions that exerted the West's hegemonic power over other forms of knowledge and being. As such, they should also be institutions that we, today, confront with a certain scepticism and with an expectation of accountability expressed through a critical analysis of their own historical positioning.⁷ Especially so, because whenever this positionality is not acknowledged and openly discussed leading to a shared, public reflection about the institutions' own implication in these historic circumstances, they tend to replicate the coloniality of knowledge and beings (Mignolo, 2011, 71).

What Mignolo discusses in his essay, quite clearly follows the line of thinking of the so-called reflexive turn in museological studies, or what became better known as 'new museology' throughout the 1980s – defined by tranzit.hu⁸ in their online Curatorial Dictionary⁹ as the moment in which:

[...] the museum as a public institution of political ideology started its "own" critical discourse, in which such themes appeared as post-colonialism, the "nation" as a construct, or the interpretation of "race" and "gender" as a social, ideological, and cultural construct. New correlations were constituted between authors, artworks, and meanings in the museum, which also influenced the collection and curatorial practice related to the collection. (tranzit.hu, n.d., New Museology)

And although the '80s are long gone and many of us would have wished for these discussions to have a

longer-lasting and more radical impact on present-day museological practice, many of these issues persist.

Taking on the conversations held throughout the '80s, in the 1990s a field of curatorial practice, institutional reform and debate known as new institutionalism started taking shape. As Claire Doherty describes it, this approach to curatorial practice was "concerned with the transformation of art institutions from within" (Doherty, 2004), but as opposed to the critique that addressed the institution beforehand, especially the artists from the '60s and '70s, followed by the new museological approach in the '80s, new institutionalism is associated with a few curators who bring their critical independent practices into the institutions they (temporarily) work at. As Alex Farquharson reminds us, institutional critique was a phenomenon that developed in specific geographical areas, mainly in north-central Europe, including the Nordic countries, the Netherlands and Germany (Farquharson, 2006). Adding to this, Jonas Ekeberg has argued that new institutionalism was an effort of "some agents of the art of the nineties" (Ekeberg, 2013, 20) to adapt the institutional frameworks to the workings of contemporary artists. As I have argued elsewhere, we can take from Farquharson that "new institutionalism [...] clearly connected to a handful of individuals that are presented as the drivers of change" (Steinvorth, 2023, 45). One such example is Maria Lind, who worked at the Kunstverein München and then moved on to take the lead of Tensta Konsthall in the suburb of Tensta in Stockholm. Another now very popular agent of new institutionalism is Charles Esche, who has been the director of the Van Abbemuseum in Eindhoven since 2004 and whose critical curatorial approach has turned the institution into one of international reference when it comes to a critical, decolonial approach to curatorial practice. However, despite the institution being an interesting example in terms of what becomes possible when curators-directors are granted the framework for a long-term critical engagement with an institution and its past, Claire Bishop also calls our attention to the fact that "the Van Abbemuseum has failed to embed itself into the local culture in Eindhoven and the region" (Bishop, 2013, 55). Speaking about the director's role in an institution, the duration of their engagement is important to consider as these positions normally don't allow for a longer-term engagement due to their rapidly rotating

⁷ Regarding the discussion around positionality cf. Haraway (1988) and Rogoff (2000).

⁸ Tranzit.hu is a network of independent initiatives working in the contemporary arts field across Austria, Czech Republic, Hungary, the Slovak Republic and Romania. The network was established in 2002 and as described on their website, its "experience with self-organized activities in progressive cultured dates back to the authoritarian society of the 1970s and '80s and has continued through the hypertransformational period of the comprehensive reform of all strata of society in the 1990s and up to the present" (tranzit.hu, n.d., About).

⁹ The Curatorial Dictionary is a long-term collaborative research project initiated in 2012 by tranzit.hu. It attempts to "interpret the most frequently used but hardly clear-cut concepts of curatorial-contemporary discourse, which has been ever expanding since the 1990s" (tranzit.org, n.d., About).

character, which in many cases leads to institutions with volatile programmes. This fact can also lead to the perception of museums as chameleons instead of reliable partners in a community. One such example is the MAAT museum in Lisbon, which in its short life has had three directors who took on totally different approaches to leading the institution. For instance, despite Beatrice Leanza's efforts to turn the museum into one that is open and relevant to the city's larger community through a varied programme including workshops, concerts and exhibitions that hosted artists and publics from the suburbs who are, under prevalent circumstances more often than not excluded from museological (and many other) dynamics in the city,¹⁰ the institution itself did not commit to these values and with the change of director a change of priorities followed. This is a perfect example of what happens when institutions themselves do not change from within and how the positive efforts of a director in terms of inclusivity and community participation run the risk of turning into a replication of coloniality in the larger scheme of things: inviting artists and certain communities to present their work and be involved in the programmes of the institution but not committing to this objective in the long term. This specific aspect of curatorial practice has been acknowledged by curator and current director of the Museum of Modern Art in Rio de Janeiro (MAM-RJ) Pablo Lafuente, who until mid-2023 worked out alongside co-director Keyna Eleison a framework to change the institutional approaches via internal policies that would survive their co-directorship of the institution.

Coming towards an end of this brief discussion about the museum's historically understood representative role, especially since the 1980's, I would like to turn again to Nora Sternfeld, who developed the notion of a radically democratic museum and is one of today's most well-known defendants of the idea that museums should serve their communities – and not just a privileged sector of it. Sternfeld describes assertively that:

[...] as a public institution the museum belongs to everybody, which means more than the understanding that it should merely be open to all. The museum gives us the possibility to ask ourselves who 'everybody' is and who is left out; it allows us to engage with what happened and to debate about what this means for the present and how, starting from there, a future that is more than just a prolongation of the present could be envisioned. (Sternfeld, 2018, 21)¹¹

Notwithstanding the fact that museums continue to be spaces that may be open to all in theory but that are not even perceived as welcoming to all sectors of society yet, I believe it is from this point of view that we need to constantly ask ourselves how our understanding and expectations of the museum need to continue evolving. When, for instance, Sternfeld speaks about an engagement "with what happened", this entails a responsibility from the museum towards its collection and its institutional history considering that the museum, as a national, Western institution, has in practice translated its representational role into an expression of hegemonic power, perpetrating exclusions rather than being a space that serves their community. Furthermore, as Sternfeld also notes, museums today must be understood within the context of an ongoing transformation of the public sphere. According to the author, if once museums used to operate under the principles of the welfare state, today they have morphed into neoliberal institutions (Sternfeld, 2018, 15). As 1980s demands for the museum to actualise itself and be socially relevant were met with the implementation of structural and institutional management strategies, these brought along a growing economisation of the institution and as such, their effect results in an anti-democratic tendency in which competition, economics and visitor's numbers become the institutional priorities above questions concerning public, conservational and research matters (Sternfeld, 2018, 15). These concerns have previously been addressed by authors

10 Examples are MAAT Mode's Episode 3: Freedom Practices. Visions of a world in various states of emergency, with programmes developed throughout 2020 such as *Terra Irada* curated by Pedro Gomes, and *I am sparse in dense fluidity* curated by Marta Lança, *MAKA Lisboa* by artist Francisco Vidal, *Essa palavra presa na garganta*, a series of film screenings about freedom and *KUDURO-ÁXIS - Luanda, Lisbon & beyond*, a conversation and two hours of DJ sets. As one can read on the museum's website, these programmes were an important step for the museum "to solicit new forms of support and expanded outreach to local communities and contextual debates that touch upon processes of decolonialisation, cultural and political activism" (MAAT, 2020). Another, more recent programme that reflects the director's efforts to open the museum to the larger community of Lisbon was the exhibition entitled *Interferences. Emerging Urban Cultures* (2022) curated by António Brito Guterres, Carla Cardoso and Alexandre Farto. As the curators explain: "The cultural diversity that characterises Lisbon does not soften the many stories of a segmented and antagonistic metropolis. *Interferences* affirms different expressions of urban culture, exploring narrative itineraries of the city through dialogues that prioritise the museum as a critical space, a place where various communities and sensibilities come together – those part of the establishment who frequent it and those subordinate who are unfamiliar with it – as a starting point for new beginnings" (Cardoso et al., 2022).

11 My translation from the original in German: "als öffentliche Institution gehört das Museum allen – was mehr meint, als dass es bloß allen offenstehen sollte. Es verspricht die Möglichkeit, sich zu fragen, wer 'alle' sind und wer davon ausgeschlossen bleibt, erlaubt, sich damit auseinanderzusetzen, was geschehen ist, darüber zu verhandeln, was dies für die Gegenwart bedeutet und wie sich davon ausgehend eine Zukunft imaginieren lässt, die mehr ist als bloß die Verlängerung der Gegenwart" (Sternfeld, 2018, 21).

such as Paul Werner in his book straight-forwardly entitled *Museum Inc.* (2006). Also Andrea Fraser, and other artists such as Gregory Sholette¹² have called our attention towards this reality. As Fraser states: “That the art world, now a global multibillion-dollar industry, is not part of the ‘real world’ is one of the most absurd fictions of art discourse” (Fraser, 2005). It might come as no surprise that this development goes hand-in-hand with an ongoing transformation in which a logic of privatisation of contemporary art museums becomes dominant, in the West as well as in other geographies. As Bishop notes, Latin America is no exception:

[...] *although publicly funded institutions of contemporary art have existed since the 1960s – for example in São Paulo and Lima, where two museums form part of university campuses (MAC-USP and LiMAC) – the highest-profile contemporary art spaces are all private: Jumex in Mexico City (established in 1999), MALBA in Buenos Aires (2001), Inhotim near Belo Horizonte, Brazil (2006).* (Bishop, 2013, 11)

Acknowledging the current situation, and that privatisation often comes with strings attached – for example in the form of self-censorship due to compromises towards its funders¹³ – what strategies do we have at hand to change towards a museological practice that is more inclusive, holding space for community participation as well as collective identity and meaning-making processes?

Coming back to Fraser, she argues that “moving from a substantive understanding of the ‘institution’ as specific places, organizations, and individuals to a conception of it as a social field, the question of what is inside and what is outside becomes much more complex” (Fraser, 2005). Through this broader understanding of the institutional field of art, it follows that not only the museum, the gallery and other physical places for collection, display and commercialisation become the target of institutional critique, but the values of the artists (and today I would necessarily add curators)¹⁴ that stand behind it as individual actors and as a collective. As Fraser continues to clarify: “It’s not a question of being against the institution: We are the institution. It’s a question of what kind of institution we are, what kind of values we institutionalize,

what forms of practice we reward, and what kind of rewards we aspire to. Because the institution of art is internalized, embodied, and performed by individuals [...]” (Fraser, 2005).

Following this understanding of the institution as a superstructure made up of social processes and a collection of values and actions that together form what we commonly refer to as the art world and its physical spaces as representative of the institution, it becomes important to question our personal positionings within it as constitutive parts of the whole. But not only this, we need to acknowledge the importance that social processes and collaborative negotiations regarding the museum’s representational role should take within museological practice.

In the now following second part of this essay, I will speak about two recent curatorial approaches that challenge the institution’s representational role. Both projects are great examples of the absolute necessity of including socially engaged practices into institutional programmes considering their (and their communities’ and collaborators’) own terms and needs as well as about the importance of the curator-director to work on long-term changes to an institution that will in most cases only be lead for a short period of time. As we will see from these still exceptional cases, understanding the museum as a platform for inclusivity and community participation is still rare and exceptions continue to be linked to singular actors within the field that prioritise placemaking in their curatorial practice.

ANTI-HEGEMONIC AND DECOLONIAL SOCIALLY ENGAGED ART AND CURATORIAL PRACTICE: CRITICAL APPROACHES TO THE MUSEUM’S (REPRESENTATIONAL) ROLE

Speaking about the ethnographic museum and pinning down its role in the modernity/coloniality dynamic, sociologist and theorist Rolando Vázquez explains that in the ethnographic museum we find representations of the ones considered ‘other’ according to colonial differentiation systems, “classifying them, speaking *about* them, but not serving them and considering them as spectators: they are the ones that are seen, not the ones that are privileged to see” (Vázquez, 2019, 2). Touching upon the power relation between the one who sees and the one who is seen, in

12 Sholette has written extensively on the relation between art and activism, focusing particularly on the elitist, established art system which incorporates artists that are at first considered radical outsiders into their closed circles (cf. Sholette, 2011; 2022).

13 Naturally, the sole fact that an institution is publicly funded does not make these questions obsolete. However, considering the nature of its character, it becomes easier to hold a publicly funded institution accountable in relation to its representational role.

14 As curator and editor of the online publication OnCurating Dorothee Richter has recently highlighted in a special edition dedicated to documenta fifteen, “curating takes place as part of the representational space, and it therefore develops a biopolitical power, an emanation of specific concepts for a worldview for a bigger part of society. What happens in the curatorial sphere might present a specific problem, a specific solution, or a specific concept of the relationship between subjects and communities” (Richter, 2022).

other words, the one who represents and the one who is represented, Vázquez picks up on a crucial point in relation to the way imperial, colonial and hegemonic control is maintained through the undermining of self-determined identity-building processes. There are plenty examples of how the look from outside misrepresents the 'Other', be it through an ethnographic gaze, the widely discussed male gaze as shown in John Berger's meanwhile classic *Ways of Seeing* (1972) and more recently, Nicholas Mirzoeff's decolonial "right to look" (Mirzoeff, 2011). Mirzoeff has written extensively on decolonisation in relation to visual culture and has most recently focused especially on the museum and the university as contested arenas involved in maintaining hegemonic regimes of visibility. Countering these practices, the author proposes a right to look, which, as he explains:

[...] is not about seeing. It begins at the personal level with the look into someone else's eyes to express friendship, solidarity, love. That look must be mutual, each person inventing the other or it fails. As such it is unrepresentable. The right to look claims autonomy, not individualism or voyeurism, but the claim to a political subjectivity and collectivity. (Mirzoeff, 2011, 1)

I believe it is this possibility that inspires anti-hegemonic and decolonial socially engaged artists and curators, whose practice recognises the value of social platforms and moments of encounter. Consequently, artistic objects and documentation become results to a process that is first and foremost, one of social character. It is through the creation of such platforms of encounter that we can even start thinking about a possible dismantling of modernity's and coloniality's toxic hierarchies and that the process of imagining collective identity spaces begins.

In this panorama, it is certainly no coincidence that the interest of a new generation of artists in socially engaged practice has revived the discussion around the representational role of art and museums. First and foremost, about how to include these artistic practices, which usually develop on a very local scale¹⁵ into the institution itself but also about how to include the communities they work with.

Although there are different reasons that could be noted when looking for explanations to the persistence of these artist's marginal position in their local art scenes as well as in the context of global art circuits, I believe that the museum's complex institutional history regarding its representational role and our not-yet internalised understanding of its role as catalyser for inclusivity and community participation stand in the way of a much-needed change in the arts ecosystem. I'm especially interested in the ways some contemporary practitioners are experimenting with processes of place-making, in which artists and curators become facilitators of a community-oriented space in which a framework for self-determined representation and identity-building processes can take place.

One such example is José Miguel González Casanova's project *Jardín de Academus. Laboratorios de Arte y Educación* (2011) held at MUAC in Mexico City. The artist-curator invited thirty-one socially engaged projects, amongst them his students from the *Medios Múltiples* [Multiple Mediums] course he led at the Universidad Nacional Autónoma de México (UNAM), to intervene in the gallery for two days at a time with a series of workshops. The proposal was that each artist works with a group of people they had already been involved with before and included other potential visitors that came to the institution. After every process-oriented workshop the material outcome of these gatherings would remain in the space, adding to the exhibition space.

When curator and secretary of MUAC Jorge Reynoso Pohlenz reflected on the project, he highlighted the following:

[...] if the museum is a signifying system that is saying something, what is it that it is saying? And, to whom? Regardless of the complex operations of Jardín de Academus, of the tensions that it generated in the changing definitions of who are them and us regarding creators, coordinators, producers, participants, and spectators, I hope that the questions mentioned above¹⁶ continue influencing the reflections of MUAC, which is defined here as an association of people, rather than a group of professionals or an institutional organism. (Reynoso Pohlenz, 2011, 11)¹⁷

15 As Luis Camnitzer has rightly noted: "Those works that deviate from the canon because they introduce elements [...] of local interest or relevance are ignored [...] or seen as less important. Ironically, it is often those works that are not necessarily accessible outside their primary audience that have a greater local impact and cultural importance" (Camnitzer, 2007, 23).

16 He refers here to questions paraphrased from González Casanova: "if the museum is a signifying system that is saying something, what is it saying? And, to whom is it saying it?" (Reynoso Pohlenz, 2011, 11).

17 My translation from the original in Spanish: "Si el museo es un sistema significativo que está diciendo algo, qué es lo que está diciendo? y, a quién se lo está diciendo? Más allá de la complejidad operativa de *Jardín de Academus*, de las tensiones que generó en las cambiantes definiciones de quiénes eran ellos y nosotros en lo tocante a creadores, coordinadores, productores, participantes y espectadores, espero que el par de preguntas mencionadas arriba perduren reflexivamente en el MUAC, definido aquí como una asociación de personas, antes que como un grupo de profesionales o como un organismo institucional" (Reynoso Pohlenz, 2011, 11).



Figure 1: Daily activities. May 21, 2010. Participants in Rosângela Rennó's *Menos Valía* (2010). Asistentes: Alexis Azevedo, Fernando Caridi and Andrés Jurado. Auctioneer: Darío T. Pie. Participants: vendors of the Martín Carrera, Portales, Santa Cruz, La Lagunilla, San Felipe and Santa Marta markets and general public (Photo: José Miguel González Casanova).

Interestingly, this statement speaks directly to Fraser's previously mentioned understanding of institutional critique, which she would rather frame as a dynamic and ongoing institution of critique. Both authors acknowledge and build on the importance of understanding the institution not as an organism that is separate from persons, but as made up of persons, who embody and perform values and relations before anything else.

In accordance with this understanding of an institution, the project by González Casanova shows us a possible way forward when it comes to welcoming socially engaged practices and the communities they work with into the institution. This does not go without challenges towards the same institution and its usual ways of operating. As González Casanova highlights: "every project provoked a negotiation between the habits of the museum and the will to inhabit the space as expressed by the creators-participants of the workshops" (González Casanova, 2011, 22).¹⁸ The project did not only allow for a

clear negotiation between the institution and the artists, but also between the artists and the participants of the workshops. As González Casanova explains, the concept emphasised that:

The artist is a sculptor who creates a social form. An identity. On the other hand, the interpreter or reader gives it a meaning. In this case, the aim was to incite a creative collaboration that would revert the passive role of the reader to generate instead an active participation of signification, of knowledge, and acknowledgment. (González Casanova, 2011, 16)¹⁹

This curatorial approach led to a vivid negotiation of the representational space of the museum. But as the artist-curator also emphasises, this would not have happened would the publics not have felt compelled to participate and create their own identitarian narratives:

¹⁸ My translation from the original in Spanish: "cada proyecto provocó una negociación entre los hábitos del museo y la voluntad de habitación de los creadores participantes de los laboratorios" (González Casanova, 2011, 22).

¹⁹ My translation from the original in Spanish: "El [artista] es un escultor que crea una forma social. Una identidad. Por otro lado, el intérprete o lector es quien le da significado. En este caso se trataba de provocar una colaboración creativa que revirtiera el papel pasivo del lector para generar una participación activa de significación, de conocimiento y reconocimiento" (González Casanova, 2011, 16).



Figure 2: Daily activities. May 29, 2010. Pins created in the framework of Mónica Mayer and Vítor Lerma's *Yo no celebro ni conmemoro guerras* (2010). Participants: Nelly César Marin, Lyliana Chávez, Orly Cortes, Ivonne Gallegos, Isabel Hernández Mújica, Aldo Juárez, Xochi Lechuga, Adán Lerma, Mauricio Morales, Adriana Raggi, Pierina Ruas, Italo Ruas, Sachiko Uzeta and Yukari Uzeta (Photo: José Miguel González Casanova).

The participants integrated because they were included in a process of constructing their own identity and being acknowledged by the world through a creative affirmation of learning and signification, of knowledge and communication. As spectators or as students they didn't become the empty receivers of information, or its mere reflection, because they participated in the creation of the experience. (González Casanova, 2011, 18)²⁰

Based on Paulo Freire's lessons on education, González Casanova created a space within the institution that developed its own ways of working and strategies to bring in people who would normally not have felt compelled to go to a space that, under normal circumstances, does not speak to them, even less *with* them. Through the transformation of the space into a participatory platform the institution developed the potential to become relevant to a broader and active public.

Acknowledging the importance of the communicative act for inclusion to become possible, González Casanova reminds us of the importance of being seen and acknowledged as we are, especially if we have been denied this right for a long time:

To experience communication is very important for whoever has been limited, ignored, or even locked away, and this experience begins with an acknowledgement of this person's existence from the 'outside' world, the normal and normalized world who has found a reason in their alterity to exclude them or cut their communication ties. (González Casanova, 2011, 20)²¹

This approach, which centres on communication and social encounters, especially for those who have been denied the public spaces to experience a healthy acknowledgement of themselves and their identities, reflects

²⁰ My translation from the original in Spanish: "Los participantes se integraron porque se incluían en un proceso de construcción de su propia identidad y de reconocimiento del mundo, por una afirmación creativa de aprendizaje y significación, de conocimiento y comunicación. Como espectadores o como estudiantes no fueron al receptáculo vacío de una información, o su mero reflejo, porque participaron en la creación de la experiencia" (González Casanova, 2011, 18).

²¹ My translation from the original in Spanish: "Es muy importante la experiencia de comunicación para quien ha sido limitado, ignorado y hasta encerrado, y ésta comienza con el reconocimiento de su existencia por parte del 'exterior', del mundo normal y normativizado que ha hallado en esta alteridad una razón para excluirlos e incomunicarlos" (González Casanova, 2011, 20).

Mirzoeff's understanding of the importance of what he calls "the right to look" (Mirzoeff, 2011). Through a curatorial approach that acknowledges the potential of encounters and creates platforms for socially engaged practices, the institution that is open to negotiating its usual ways of operating can become relevant to a broader segment of society. In this sense, socially engaged art can potentiate an institution's inclusivity and community participation. Especially, if this is conceived of as in the form of longer-term institutional commitments, both with the artists and the larger community.

A recent and interesting example in this regard is the work that started developing by the hand of the co-directorship at MAM-RJ since 2020. Pablo Lafuente and Keyna Eleison²² made it their goal to make this long-standing institution relevant to the present days, by consciously thinking about inclusivity and community participation. To start with, their curatorial approach acknowledges the system's historically inherent racism and exclusionary politics to think about a long-lasting change via succession planning. As Lafuente explains:

We could bring in the passistas from Mangueira²³ to do something, but we don't want them to come, have them perform and that they leave and the museum is left with some photos... This the museums know very well how to do, incorporating without it affecting the functioning of the museum. We have to modify the modes of operating, we have to put the institution at risk: in its convictions, in its ways of working and operating. (Lafuente, as cited by Royo Gual, 2020)²⁴

Following this approach to directing an institution, and with the clear objective of bringing the museum closer to the city's peripheries and its inhabitants, one of the first changes the co-directors introduced after taking on their positions at MAM-RJ

was to get rid of the institution's entrance fee. Thus, the museum now counts on voluntary contributions. As Lafuente explains: "The inequalities in Brazil are rampant. A museum that charges the same entrance fee for everybody is abstracting itself from the reality in which it is inserted" (Lafuente, as cited by Royo Gual, 2020).²⁵

Furthermore, and coming to speak about their curatorial approach in leading the museum, Lafuente and Eleison radically questioned the centrality of the exhibition within museological practice. As Lafuente describes in an interview organised by the Brazilian initiative *Museu Sem Paredes*:

Museums are more than just a place for presenting. It sounds simple, but we need to understand the density of this: museums are also a place for custody, a place for education, a place for creation, [...] a place for formation and maybe even agency. It's complicated. [...] Withdrawing the central role of the art exhibition is a provocative way of giving space to all these other actions that are also part of the institution museum. (Lafuente, 2021, min. 8:30)²⁶

He continues to explain that their decision to work on this specific matter is not new. In his own words:

It's interesting to compare the ICOM congress of 1972 in Santiago, Chile with examples of texts written in the '70s in Europe by museums and curators. And it's interesting to see how the emphasis on the social function of the museum as well as on its educational role, of its necessity of relating to the policies of the ministries of education, etc. was an issue that was very much present in the museum definition that was proposed in Latin America during the '70s. (Lafuente, 2021, min. 9:20)²⁷

22 In July of 2023, Keyna Eleison left her position at the museum and Pablo Lafuente took on the sole directorship of the institution that they previously shared.

23 Lafuente's comment references an anecdote about artist Hélio Oiticica's and Mangueira's planned performance at MAM-RJ in 1965. Oiticica, in an attempt to bring together his avant-garde artistic practice with the best of popular culture of the time, had invited the dancers from the samba school of Mangueira to perform. Yet the museum guards did not let the dancers, the so-called *passistas* – mostly black inhabitants of the favela – enter the institution.

24 My translation from the original in Spanish: "Podríamos traer a los *passistas* de Mangueira para hacer algo, pero no queremos que vengan a hacer un espectáculo y se vayan y que el museo tenga unas fotos... Eso los museos lo saben hacer muy bien, incorporar sin que afecte en nada al funcionamiento del museo. Hay que modificar la manera de funcionar, hay que poner en riesgo la institución en sus convicciones y en sus formas de trabajar y de operar" (Lafuente, as cited by Royo Gual, 2020).

25 My translation from the original in Spanish: "En Brasil las desigualdades son brutales. Un museo que cobra una entrada igual para todo el mundo se está abstrayendo de la realidad en la que vive" (Lafuente, as cited by Royo Gual, 2020).

26 My translation from the original in Portuguese: "O museu não é só um lugar de apresentação. Soa muito simples, mas é necessário entender a densidade disso: o museu é um lugar de custódia também, é um lugar de educação, é um lugar de criação, [...] é um lugar de formação, de agenciamento talvez até. É complicado. [...] Tirar a centralidade da exposição de arte é um jeito de polemicamente criar ou deixar espaço para todas essas outras ações que também são parte da instituição museu" (Lafuente, 2021, min. 8:30).

27 My translation from the original in Portuguese: "É interessante comparar o congresso do ICOM em 1972 em Santiago de Chile com por exemplo textos escritos nos anos '70 na Europa por museus e curadores. E é interessante ver como essa ênfase na função social do museu e a função educativa do museu, a necessidade de relação do museu com as políticas educativas dos ministérios de educação, etc. era uma questão que estava muito presente na definição de museu que se propôs nos anos '70 na América Latina" (Lafuente, 2021, min. 9:20).

Taking away the exhibition's centrality within the museum and openly defending that not all resources need to be invested in public moments of presenting, opens up the possibility to advance other types of community engagement such as MAM-RJ has done through its recently implemented residency programmes. This way, the institution acknowledges the importance of considering other moments that are less public in its nature but in which the institution is – or at least should – also be involved. Following this line of thought, MAM-RJ has implemented five types of residencies, for artists, artists with disabilities, school and high school teachers, teenagers, and curators from areas considered peripheral. All the residencies are understood as moments in which learning can happen both ways, meaning for the residents as well as for the institution who shows itself open and eager to receive feedback from the residents in relation to their work with the aim of being able to continue developing their critical questioning of the institution and its ways of operating. In this sense, the museum presents itself as an institution that wants to listen to its public to better adapt itself to their specific interests and necessities.

CONCLUSION

Although critical discourse about the complexities of the museum's (representational) role is ongoing (Bishop, 2013; Sternfeld, 2018; Kupka, 2023), there seem to be interesting curatorial strategies being developed to respond to these institutional challenges, revealing the museum's potential as place-holder for collective identity-processes and

as active placemaker. Through the creation of platforms for social encounter and participation, cultural institutions can hold space for segments of society that have, for many centuries, not had access to representational spaces – even less so as subjects and narrators of their own stories. This demands the institutions' acknowledgement of its responsibility in these historical processes as well as a long-term commitment to change these dynamics. As the two discussed examples, *Jardín de Academus* (2011) at MUAC and the institutional changes implemented at MAM-RJ have shown, there are feasible ways for museums to move towards a realisation of ICOM's new museum definition. As both projects focus on the importance of process and the creation of platforms for social encounters, both building on the impact of collective learning experiences and the importance of institutional listening, they open the possibility to dismantle hegemonic dynamics through counter-practices. If, as Raymond Williams has claimed, "a lived hegemony is always a process. It is not, except analytically, a system or a structure. It is a realized complex of experiences, relationships, and activities, with specific and changing pressures and limits" (Williams, 1977, 112), then anti-hegemonic and decolonial artistic and curatorial *processes* seem the only possible practice to dismantle historically exclusionary systems from within the institution. It is in this sense that I would like to call attention to these practices, encouraging further thought and action acknowledging the urgency for museums to consider anti-hegemonic and decolonial socially engaged artists and curators as allies to think about better ways of doing museum today.

O DINOZAVRIH IN KAMELEONIH ALI O REPREZENTATIVNI VLOGI MUZEJEV: KAJ, ZA KOGA IN V KAKŠNIH OKOLIŠČINAH?

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POVZETEK

Dani prispevek obravnava nedavno revidirano opredelitev muzeja, ki jo je pripravil Mednarodni muzejski svet (International Council of Museum, ICOM) in govori o vlogi in možnih načinih za vključevanje in sodelovanje javnosti in lokalnih skupnosti. Obravnavani so pojmi nove muzeologije, de-kolonialno mišljenje ter diskurz o zgodovini reprezentativne vloge muzeja ter njegove institucionalne kritike. V prispevku sta obravnavana dva kuratorska pristopa, ki bi lahko spodbudila večje sodelovanje in vključenost skupnosti, pri čemer bi omogočila usmerjanje prostorskih posegov in umeščanje prostorskih praks v širši kontekst. Sprva je predstavljen pristop umetnika José Miguel González Casanove s kuratorskim projektom Jardín de Academus (2011) v Museo Universitario de Arte Contemporáneo (Ciudad de Mexico), v katerem je v galerijski prostor povabil enaintrideset del družbeno angažiranih pobud. V drugem delu analiziramo kontekstualno usmerjen in sistemsko ozaveščen kuratorski pristop Pabla Lafuenteja in Keyne Eleison, prvih voditeljev muzeja the Museu de Arte Moderna v Rio de Janeiru. Antihegemonska in dekolonialna družbeno angažirana umetniška praksa in kuratorsko delo sta predstavljena in obravnavana kot možna zaveznika, ko gre za ponovni razmislek o današnji muzejski praksi skozi prizmo ustvarjanja prostora in njegove reprezentacije.

Ključne besede: muzeji, reprezentacija, kuratorstvo, *placemaking*, družbeno angažirana umetnost, inkluzivnost, sodelovanje skupnosti

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DEFINING PLACES: THE ROLE OF CREATIVE PRACTICES IN URBAN PLACEMAKING

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ABSTRACT

This paper addresses a recurrent discourse surrounding the concepts of space and place, emphasising their intra- and inter-relationships and how creative placemaking practices shape and define them. It argues that “place” encompasses multiple meanings, extending beyond tangible and visible dimensions to include emotional, learning, memory, and creative spaces. Through a comparative analysis of two platforms, A-Place and KÉK (Hungarian Contemporary Architecture Centre), the study examines their creative placemaking approaches across various European cities. By contextualising their practices through four key concepts, this paper highlights the practical application of abstract placemaking ideas in diverse urban settings.

Keywords: placemaking, creative practices, artistic practices, urban places, A-Place, KÉK

DEFINIRE I LUOGHI: IL RUOLO DELLE PRATICHE CREATIVE NELLA PROGETTAZIONE DI LUOGHI URBANI

SINTESI

Il presente articolo affronta una tematica ricorrente sui concetti di spazio e luogo, enfatizzando le loro relazioni intra- e inter- dimensionali e in che modo le pratiche di “creative placemaking” li plasmino e li definiscano. Sostiene che il “luogo” comprende molteplici significati, estendendosi oltre le dimensioni tangibili e visibili per includere spazi emotivi, di apprendimento, di memoria e creativi. Attraverso un’analisi comparativa di due piattaforme, A-Place e KÉK (Centro Ungherese di Architettura Contemporanea), lo studio esamina i loro approcci di “creative placemaking” in diverse città europee. Contestualizzando le loro pratiche attraverso quattro concetti chiave, l’articolo mette in evidenza l’applicazione pratica delle idee astratte di “placemaking” in diversi contesti urbani.

Parole chiave: creazione di luoghi, pratiche creative, pratiche artistiche, luoghi urbani, A-Place, KÉK

INTRODUCTION¹

In our everyday lives, we often use the terms *space* and *place* interchangeably to refer to locations and areas. However, in the realms of geography, sociology, urban studies, and many other disciplines, these concepts take on nuanced meanings that reflect their broader implications for understanding human experience and relationships with environments.

Space, in its basic sense, refers to the abstract and geometric dimensions of the environment – areas that can be measured and mapped. It represents the multidimensional expanse in which objects and events occur, often associated with the physical and mathematical aspects of location. From a scientific viewpoint, space is infinite and serves as the backdrop against which all events unfold. Yet, space is imbued with meanings through human interactions and perceptions, shaping how we perceive and use spaces and leading to ever-evolving interpretations and experiences. Conversely, place transcends these physical boundaries, encompassing the meanings and values that people attribute to spaces, transforming them into meaningful locations. Place is a space imbued with significance through human experiences and connections, becoming sites of interactions, memories, narratives, and identities. In this regard, place is not only defined by physical attributes but also by the relationships and emotions that individuals or communities associate with it. This association alters the sense of belonging and familiarity cultivated over time through exposure to the surroundings. As Tuan (2002, 6) aptly put, “if we think of space as that which allows movement, then place is pause; each pause in movement makes it possible for location to be transformed into place.” This leads us to consider the relationship between space and place as an ongoing and dynamic process, where spaces transition into places as they acquire personal or collective meanings, and conversely, lose these meanings to revert to mere spaces. This transformation can be driven by historical events, cultural practices, or individual experiences, highlighting that places are not stagnant entities but are continually shaped and redefined over time.

In the contextualisation of space and place, the practice of placemaking emerges as a vital endeavour, acknowledging the nature of space and place as well as their transitory relationship. It involves intentional efforts to enhance the unique identity and characteristics of a place through community engagement, design interventions, and cultural activities. By fostering connections and interactions, placemaking endeavours to imbue spaces with new meanings and values, thereby

transforming them into places that resonate with communities, rather than speaking on an individual scale. In this way, it focuses on animating spaces with activities and events that reflect and celebrate the unique and social fabric of a place. This process not only enriches the physical environment but also strengthens social bonds and fosters collective ownership and stewardship of the place. This allows placemaking to serve as a catalyst for reimagining and revitalizing urban areas, encouraging inclusive and participatory approaches that empower communities to shape the places they inhabit. In this regard, placemaking is an interdisciplinary practice that bridges theoretical understandings of space and place with practical interventions aimed at transforming spaces into meaningful and inclusive places that enrich human experiences and foster a sense of belonging and community.

Building upon these foundational understandings of space, place, and placemaking, creative placemaking emerges as a dynamic approach that infuses art, culture, and creativity into the process of transforming spaces into vibrant places. Creative placemaking leverages artistic and cultural interventions to reimagine and activate underutilised spaces, breathing new life into urban landscapes and community environments. By integrating artistic practices such as public art installations, performances, festivals, and community workshops it fosters engagement and dialogue among residents, artists, and stakeholders. One key aspect of creative placemaking is its ability to effectively activate *meanwhile spaces* or transitional areas within the urban fabric. Although it achieves these through temporary activations, it facilitates long-lasting impacts of cultural activity and community engagement, which also leaves positive impacts on future collective memories. In this way, creative placemaking emphasises the importance of co-creation and participatory endeavours to ensure resulting spaces authentically reflect local values and aspirations.

As comprehensive engagement and professional interest in creative placemaking practices require critical reflections on *space* and *place*, several current placemaking initiatives propose establishing a network of placemaking knowledge that transcends geographical and cultural boundaries. Their objective is to foster communities through innovative practices, enhancing the way we perceive and experience different locations. This cohesive effort unites creators under the common banner of the relationship between individuals and their surroundings by integrating artistic approaches into its methodologies and forging connections through diverse actions.

¹ This publication partly builds upon the results of the activities in the European project “A-Place. Linking places through networked artistic practices” co-funded by the Creative Europe programme 2019–23, with Project Agreement number 607457-CREA-1-2019-1-ES-CULT-COOP2. The first author of this publication (İlter, Ö.) is an independent researcher, not affiliated with the A-place project. The publication has also received support from the Research Programme J5-1798, co-financed by the Slovenian Research Agency (ARIS).

In this study, we compare the practical manifestations of creative placemaking through the activities of two prominent initiatives: the A-Place platform and KÉK (Hungarian Contemporary Architecture Centre). By examining the approaches taken by these organisations across various European cities, the study aims to explore how they redefine and enrich our understanding of place and its significance in the modern world. Through this comparative analysis, we seek to identify both the commonalities and unique contributions of each initiative to the evolving discourse of placemaking.

THE DUAL NATURE OF SPACE AND PLACE

In his book, *A History of the World in 100 Objects*, Neil MacGregor explores world history through his analysis of one hundred selected objects from the British Museum. Beyond the fascinating stories of these objects, MacGregor poses a simple yet profound question: *What makes humans human?* His answer is unique among many possible responses. He suggests that it is not merely our brain evolution that defines our humanity, but rather our intrinsic need to gather knowledge and pass it on through generations, setting us apart from other species on Earth. We rely on both evolutionary knowledge (such as learning to walk upright) and acquired knowledge. This process of generating and transmitting knowledge is significantly influenced by our living environments, where we live, work, travel, build networks, learn, and perceive (Relph, 1976). Our spatial wonder about our surroundings drives us to delineate and define the spaces encircling us, and enhance our human presence.

This ever-changing narrative, inherent in the essence of place, arises from our efforts to comprehend our surroundings through experience, experimentation, knowledge, and conceptual thought responding to our existence within a specific space and time – an innate endeavour to explore and reveal our capabilities as we interact with our environment (Golledge, 1979).

Therefore, these interactions continually evolve within socio-cultural dynamics, providing essential insights into our understanding of the world. This exploration also guides endeavours to perceive and narrate place as a unique way of seeing (Cresswell, 2011). Acknowledging these perspectives as intertwined with cultural contexts underscores the significance of belonging and individual or communal ownership within spatial contexts. As places accumulate personal and social meanings, they become focal points for identity and a sense of belonging (Caruso & Palm, 1973).

Anthropologists have long been interested in the spatial dimensions of cultural practices and their theoretical implications. They examine and describe the material conditions of daily life to support various theories. The idea that all activities are embedded in and composed of space has gained importance as anthropologists have

shifted their focus, emphasising the spatial components of culture rather than treating them as mere background (Low & Lawrence-Zúñiga, 2003). When *space* is considered within an infinite emptiness, it lacks emotional interaction and remains unexperienced and unexplored. While space can be understood as physical dimensions or the vastness of the universe, the meaning of place arises from human experiences and cultural significance. The interactions and norms created within and about space transform it into a place (Malpas, 1999). A place is a location where individuals specifically interact. The more familiar an area becomes, the more it transforms into a place. Ratcliffe and Korpela (2018) emphasize how personal memories influence the creation of a place identity. Place extends into our behaviours, memories, and existences, and is, in return, shaped, personalised, and communed through us. Space outside us impacts our very being and, in turn, becomes a place (Tuan, 2002). A place can encompass multiple spaces, just as a single space can give rise to diverse potential places, blurring the distinction between them. As we come to know a *place*, we also come to understand the *unknown* within it.

Environmental anthropologist Eric Hirsch (1995) proposes that spaces have the potential to transform into places, contrasting them as *background* and *foreground* symbols in our visual history. Foreground space symbolises potential and change, where transformations can occur, while background space represents actuality – established, recognizable places with distinct identities and functions. Together, these concepts contribute to our understanding of how spaces evolve into significant locations. Hirsch suggests that if a place can be likened to an image, then space serves as its representation. Between the undulation of known and unknown, space and place exist, taking us out of the binary by smudging the concrete lines between the two. Tuan (2002, 3) captures this relationship by stating, “place is security, space is freedom: we are attached to the one and long for the other”. Space represents the unexplored territory awaiting individual exploration, the frontier yet to be traversed.

Lefebvre and Gardiner underline the dynamic nature of space from distinct standpoints. Both discuss space as a medium of social relations and as a material entity influenced by and influencing social interactions. Known for his politically informed philosophy, Lefebvre (1991) explores how spaces are utilized by dominant powers to establish institutions that influence societal structures. According to him, these created spaces are not devoid of contradictions and highlight the fluid and evolving nature of social dynamics, rejecting the notion of society as a static entity solely shaped by hegemonic relations.

On the other hand, Gardiner (2000) focuses on everyday life patterns and practices, introducing the concept of selfhood to describe how individuals envision themselves as coherent and meaningful entities.

Drawing on Bakhtin's ideas, Gardiner critiques detached contemplation from a distant perspective. He argues for active participation within shared frameworks of value and meaning in ethical relations with others, rejecting a neutral, objectifying gaze detached from everyday existence and advocating for an engaged and empathetic consciousness in interpersonal interactions. Gardiner's idea of coherent entities and Lefebvre's contradictory space complement each other. Coherent entities, extending beyond their individual selves, inhabit a space that is continually evolving. In doing so, they contribute to transforming this space into a meaningful place, which may still retain elements influenced by dominant systems, revealing aspects of distance and the *unknown*. Gardiner's work enriches our exploration of the unknown within the fabric of existence. Over time, temporal dimensions gradually dissolve layers of uncertainty for observers of these spaces. People connect to both visible and invisible dimensions of physical spaces through memory, stories, daily routines, experiences, artistic expression, or intuition. This process shapes and creates deeper connection with spaces, evolving into a profound sense of place and fostering greater willingness for co-participation and engagement in placemaking initiatives.

Spaces present us with the challenge of unfamiliarity, prompting efforts to convert them into the comforting familiarity of place. However, this transformation sometimes results in the creation of what cultural anthropologist Marc Augé (1995) terms non-places—environments characterized by a sense of disconnected familiarity. Augé defines non-places transient, anonymous spaces lacking meaningful social interactions and personal connections. These spaces often include modern transit areas such as airports, shopping malls, and highways, where individuals pass through without establishing a sense of belonging or attachment. Non-places exemplify the influence of globalization and the standardisation of urban environments, where uniform structures and commodified experiences dominate. In contrast to the rich significance of places, non-places, thereby evoke feelings of detachment, alienation, and loss of personal identity.

PLACEMAKING PRACTICE: THE CATCHER OF SPACE

Within the triad of space, place, and non-place, placemaking occupies a crucial middle ground, striving to capture and promote evocative connections between the various spaces and their users, while also addressing the growing prevalence of non-places. Urban design plays a pivotal role in this endeavour, influencing not only physical layouts but also planned public areas that foster diverse social interactions, thereby strengthening the social fabric of communities. By integrating artistic approaches into its methodologies, placemaking seeks to transcend geographical and cultural boundaries, aiming

to enrich our perception and experience of different locations by fostering connections through diverse activities. Through these efforts, creative placemaking practices manifest their goals through a variety of initiatives, all aimed at nurturing creativity and uniting creators with a cohesive relationship between individuals and their surroundings.

In the practice of placemaking, neither social nor spatial elements stand alone; they exist in a symbiotic, multifaceted relationship. This relationship shapes not only the physical aspects of a place but also nurtures a collective consciousness – a shared narrative that intertwines the individual stories of its inhabitants (Mateo-Babiano & Lee, 2020). Recognising that placemaking, including creative placemaking, is not a formulaic process underscores the importance of cross-sector alliances and coalitions that can profoundly influence a region's cultural and economic future. Furthermore, installations by architects serve as a platform for both pedagogy and practice, encircling this art-making process (Ishida, 2023). Active listening and engagement become paramount in this process. Successful creative placemaking is inherently distinctive; it responds to and reflects the cultural heritage and values that are meaningful to a community and its residents (Cook, 2021).

Placemaking initiatives, such as Linking places through networked artistic practices (A-Place, 2023), PlaceCity (EUTROPIAN, 2024) and programs of the Hungarian Contemporary Architecture Centre (KÉK, 2024)² among many others aim to raise awareness about the risks posed by the growing prevalence of non-places and the potential erosion of our innate sense of wonder. As our understanding of the world expands through maps, geographical literature, and stories, we face a surplus of spaces. The challenge within this surplus lies in establishing meaningful connections. Paradoxically, despite living in an era of unprecedented mobility, detachment becomes more pronounced. The world we inhabit, which we are expected to comprehend, often renders us anonymous and less inclined to feel a sense of belonging (Buchanan, 1999).

Delving into the realms of belonging and place identity, placemaking practices seek to move beyond abstract concepts and focus on tangible human experiences. They draw inspiration from thinkers who explore questions about human existence. Both place and identity are shaped by ongoing cognitive experiences, yet their interconnection remains steadfast. This interdependence requires re-articulation across different contexts. Placemaking practices thus emerge as dynamic and organic responses to these complex challenges, offering a framework to understand the intricate relationship, characterised by bonds woven into convoluted socio-political and economic discourses.

2 Hungarian Contemporary Architecture Centre (KÉK) is the organisation behind initiatives such as Budapest100 and Nyitva Festival (KÉK, 2024).

Placemaking emerges in dialogues that serve as guiding markers. These dialogues facilitate the identification of places, illuminate the potential outcomes of social interactions, and explore ways to transform ambiguous spaces into meaningful locations. A comprehensive grasp of their social impact necessitates an exploration of how diverse users perceive and experience these revitalised places (Carmona et al., 2003). The essence of place and identity unfolds within the chemistry of social and individual dynamics, involving culture and collective memory. Within this foundational framework lies a multitude of invisible elements and spaces – linguistic, cultural, and beyond – that collectively constitute the very fabric of place (Paulsen, 2004). Contemplating whether a particular locale can maintain its identity as a place when moved into a vastly different cultural or linguistic setting challenges us to consider the fluidity of place identity. It also underscores our role as active shapers of spatial perception, emphasizing our responsibility as stewards of the spaces we occupy.

The Overarching Themes Revolving Around Quality Places and Fair Communities

The comparison of placemaking concepts in this discussion draws upon ideas that gained traction decades ago when authors, architects, and urban planners like Jane Jacobs, Gordon Cullen, Christopher Alexander, and William Whyte, among many others, introduced pioneering ideas about designing cities for people. These foundational ideas have been integral to contemporary placemaking initiatives, including those of KÉK and A-Place, both of which have built their activities around these principles. In the following sections, we provide a detailed description of how KÉK and A-Place integrate these concepts into their respective frameworks, highlighting their unique approaches and contributions to creating quality places and fair communities. This comparison will explore how both platforms adapt these time-honoured ideas to modern contexts, ensuring their relevance and impact in contemporary urban settings.

In today's modern urban development, the creation of quality places and the integration of ideas and ideals from the past are nowadays widely promoted by initiatives such as the Project for Public Spaces (PPS, 2024)³ and the forward-thinking New European Bauhaus initiative (NEB, 2021) that create compelling placemaking principles. Both PPS and NEB, with their shared focus on human-centred design, sustainability, cultural context, collaboration, accessibility, and innovation, are forging a powerful alliance that aligns with European Urban Initiative objectives as well as the United Nations Sustainable Development Goals

(UN SDGs, 2015). This convergence beckons policy-makers and urban planners to align their strategies, channelling resources, and expertise into the creation of inclusive, aesthetically inspiring, and sustainable urban environments, as well as to facilitate the transfer and integration of knowledge.

To support these practices, A-Place and KÉK stand out for their unique approaches and contributions to embracing connections between people and places. While both initiatives share a common goal of enhancing urban spaces and promoting a sense of belonging, they differ in their methodologies, focus areas, scale, and overall impact on the communities they serve.

A-Place is both a platform and organisation that operates on a transnational level, spanning six European cities, bringing together a network of artists, architects, urban planners, and community members to explore and reimagine the concept of place. Its mission is thereby to create a collaborative environment with a strong emphasis on community engagement and participation. Recognising the importance of local input, the platform ensures that the needs and preferences of the communities are reflected in their activities. Furthermore, A-Place is committed to experimentation within its placemaking strategies. This focus is evident in the various hands-on events (public interventions, exhibitions, workshops, contests, etc.) that A-Place organises, which facilitate knowledge and exchange, and promote awareness of placemaking strategies, encouraging active participation and collaboration. Through these efforts, A-Place effectively strengthens the social fabric of communities across different spatial-cultural contexts. The ideals are determined by A-Place, through eight cross-cutting thematic lines which represent the essential qualities that creative placemaking commonly challenges. These themes include: a) *vitality of places*, encompassing notions of vividness, safety, lingerability, and the capacity to raise curiosity and playfulness; b) *engaged communities*, embracing notions of togetherness, commitment, care, and solidarity; c) *a strong sense of place and belonging*, emphasising collective memory and local pride; d) *sustainability awareness*, focusing on responsibility and respecting the environmental limits of our places; e) *sensory engagement*, encompassing the soundscapes, scent-scapes, and other visible and invisible sensory layers that trigger our perceptions; f) *fostering creativity*, expressing collective creativity through street art, participatory performances, and imagination-boosting activities; g) *diversity and inclusivity*, encompassing coexistence, tolerance, design justice, and shared visions; and h) *creating learning spaces*, realising the benefits of shared learning environments and experiences.

³ The Project for Public Spaces (PPS) is a non-profit organization funded in 1975 by Fred Kent dedicated to public participation in planning urban spaces in cities (PPS, 2024).

On the other hand, KÉK, an independent professional institution based in Hungary, operates with a more localised focus on architecture, the built environment, urban development, and their relation to communities, emphasising the importance of architectural heritage and contemporary design in shaping sustainable, liveable urban spaces. KÉK's approach is deeply rooted in education, research, and long-term programs while engaging the public and foster an appreciation for the architectural characteristics and texture of Hungary, along with its historical background. This mission is further supported by KÉK's commitment to research and documentation, conducting scholarly endeavours, highly informing its public programs and workshops, which allows KÉK to effectively act as a bridge between practitioners and the public. In this context, within its methodological thematization, KÉK mostly prioritises: a) *new methods in urban regeneration*, examining the latest methods, formats and possibilities in rethinking urban neighbourhoods; b) *innovation for sustainable society*, planning and integrating spatial practice to contribute a sustainable and resilient society and environment; c) *transparency in architectural affairs*, implementing wider decision-making practice related to architecture and planning to articulate opinions and participating at debates about the city; d) *architectural culture and community*, planning and designing accessible and comprehensible to the broader public, and promoting a community-based approach in urban policies.

While each of these thematic focuses of both platforms has its own unique traits and emphasis, they are not independent entities; instead, they exist in a state of interconnectedness. The placemaking activities undertaken effectively blend these themes, highlighting their synergistic potential and flexibility. Through these efforts, sustainability practices are promoted to enhance environmental consciousness, forge connections among residents, and bolster community bonds. In the following section, we present a curated selection of four themes derived from the extensive placemaking practices of A-Place and KÉK, further delineating and contextualising contemporary endeavours within place-related domains.

FROM CONCEPTS TO TANGIBLE REALITIES

Urban initiatives and practitioners engage in dynamic efforts to navigate the relationship between personal experiences and the distinctive characteristics of place, focusing on concepts such as belonging and identity. Through these endeavours, they target collective creativity and activate communities, placing these elements at the forefront of their activities.

This interaction recognises the inherent dynamism of places and their ongoing evolution within diverse cultural landscapes and perceptions. These initiatives and projects aim to transform spaces into meaningful places, addressing emerging complexities not only to deepen understanding but also to confront spatial production and development that have resulted in the emergence of non-places – spaces where meaningful connections struggle to take root. These endeavours aim to review and reconsider accomplishments through interconnected evaluations, starting with an array of experiment case studies. They advocate for multisensory, creative experiences that nurture personal and communal growth, encouraging the establishment of higher-quality public spaces. Placemaking activities, thereby translate lived experiences into well-defined, tangible actions.

In the following section, practical applications of four selected overarching concepts are analysed through the placemaking activities of both A-Place and KÉK: *urban vibrancy*, *urban sensory engagement*, *urban sustainability*, and *urban creative dynamics*. Each concept underscores strategic approaches that challenge and re-evaluate conventional spatial practices conducted by both platforms, facilitating interactions through active engagement. While each concept maintains distinct focal points, their interconnectedness uniquely responds to placemaking efforts, collectively advancing environmental consciousness, personal and communal development, and innovative community-building. These initiatives embrace a hands-on learning approach within a backdrop of *togetherness*, aiming to claim more liveable spaces and forge connections among individuals.

Urban Vibrancy

Social space is composed of interconnected locations organised through communication networks, rather than simply being objectively homogenous areas. Therefore, social consciousness advances through communication (Claval, 1984). Public space serves as a platform for communication, where interrelated elements convey messages. The concepts of *public* and *publicity* are closely connected, as activities within public spaces are widely known and shared (Madrado et al., 2022). As communities collectively *take up* and imbue spaces with their own significance, these spaces evolve into meaningful places that embody a sense of solidarity and community identity (Walsh & High, 1999).

Placemaking celebrates local culture, heritage, and artistic expression, providing platforms for artists, performers, and creatives to showcase their talents and engage with the public in collaborative efforts to rejuvenate spaces. In this context, placemaking involves community members actively participating in the



Figure 1: Low-cost pocket placemaking action in Bologna: the creation of a small parklet placed in the space of three parking lots connected the interior of the placemaking NGO's office with an expanded sidewalk, featuring an artistic program catering to all generations (Source: City Space Architecture).

design, activation, and upkeep of public spaces. This encourages a vibrant atmosphere where people are highly committed to the well-being and of their surroundings. This approach often centres on designing physical spaces to further facilitate people's interactions and opportunities for lingering. As such, placemaking interventions assist cities in transforming their public spaces into vital, functional areas, commonly beginning with short-term, low-cost experiments. This involves analysing how people interact with a specific space and implementing changes to enhance its usability. Moreover, by embracing community engagement through art-making and *artivism*, creativity, or play-making, these spaces gain opportunities to transform, offering greater prospects for lasting impact.

Figure 1 demonstrates a temporary placemaking action implemented in Bologna under the A-Place initiative framework. The concept of the pocket action in a residential neighbourhood aimed at reclaiming three parking lots by expanding the sidewalk, creating more space for social interaction in front of the City Space Architecture NGO headquarters. The parklet connected the street with the community office entrance and the indoor space, which was frequently used for social events, lectures, and courses. Despite being a modest use of space, the street parklet expansion and program integration provided a compelling reason for people

to linger and return regularly. The Bologna parklet hosted various activities, including performances by young artists, musical events, courses and workshops, efficiently bridging the indoor headquarters with the outdoor parklet.

Urban spaces are not merely physical environments; they are shaped by the collective memories, experiences, and interactions of the communities that inhabit them. Urban historian Dolores Hayden emphasises the concept of *place memory*, which refers to the identities (Hayden, 1995). In this context, the act of placemaking is not just about altering physical space, but also about nurturing a sense of belonging and continuity within the community. Placemaking activities help reconnect people with their urban environment, creating spaces that reflect the unique character and history of the local community.

Budapest100, an annual event organised by KÉK in collaboration with OSA Archivum, exemplifies this approach by celebrating the centenary buildings in Budapest, transforming them into focal points for community engagement and historical reflection. The event opens the doors of these century-old buildings to the public, allowing residents and visitors alike to explore, learn, and share stories that highlight the architectural and cultural heritage of the city. By doing so, Budapest100 transforms these buildings from mere structures into living spaces



Figure 2: Scenes from the Budapest100 event, where historic buildings were opened to the public, blending architectural exploration with community engagement through various events, including outdoor courtyard gatherings and indoor sessions where residents shared personal and communal histories (Source: Hungarian Contemporary Architecture Centre).

that embody the collective memory and identity of their neighbourhoods. The event's success lies in its ability to foster a sense of ownership and pride among participants. By inviting the public to contribute their memories and narratives, Budapest100 becomes a platform for inter-generational dialogue, where older residents share their stories with younger generations, creating a living history that enriches the community's connection to its surroundings. Additionally, the event incorporates guided tours, exhibitions, concerts, and performances that further engage participants, transforming the act of visiting these buildings into a multifaceted cultural experience. Figure 2 depicts scenes from a recent Budapest100 event, where to the interiors of several historic buildings were opened to the public. The event not only showcased the architectural beauty of these structures but also highlighted the personal and communal histories associated with them. Participants engaged in in-house history exhibitions, where they could share their own experiences related to the buildings, thus contributing to the collective narrative of the city. Through these activities, Budapest100 encourages residents to view their urban environment not just as a backdrop for everyday life, but as an active participant in the ongoing story of their community.

Urban Sensory Engagement

Evoking sensory awareness in urban spaces relates to the concept of sensory urbanism, which investigates how non-visual information defines a city's character and influences its liveability. As Howes (2022) describes, this involves exploring diverse ways humans perceive and interpret the world around them. Howes primarily uses an ethnographic approach, employing observation and interviews to establish best practices for effective sensory design in public spaces. Effective sensory design integrates elements such as sound, smell, touch, and sight into the overall experience and functionality of a space. The sensory experience of a place also plays a crucial role in shaping its identity. When communities actively engage with and attribute meaning to places through sensory design, they collectively enrich their experiences and collective memory. Placemaking initiatives honour collective memory and place identity to reinforce a community's sense of belonging (Lak & Hakimian, 2019). The incorporation of elements like soundwalks or other multisensory experiences adds a new dimension to placemaking, enriching our sensory experiences and deepening our



Figure 3: A collective recording of the unique sounds of the Bairro do Rego neighbourhood, serving as the foundation for a soundwalk itinerary. The soundwalk aimed to explore and highlight the auditory identity of the neighbourhood incorporating both the original recorded sounds and amplified through post-production (Source: Marta Fiolic).

emotional connection to place (Glover, 2023). Sound, often overlooked in traditional urban planning, has the potential to evoke memories, create ambiance, and shape our perception of space. By integrating sound as a design element, pacemakers can evoke specific moods, encourage contemplation, or promote a sense of place through shared auditory experiences.

One of the sensory-focusing initiatives was implemented in Lisbon's Bairro do Rego neighbourhood. It revolved around reigniting communal bounds and revitalizing urban areas through the recognition of a distinctive auditory landscape. Recording collective urban sounds and subsequently creating a soundwalk itinerary with neighbourhood youth was a crucial tool for enhancing spatial perception and fostering emotional connections to places (Figure 3). This process created multi-sensory environments that enriched the placemaking experience, inviting residents or visitors to engage.

Urban spaces are experienced through a multitude of senses, and the way these senses interact with the environment shapes our perception of place. Sensory urbanism expands the focus beyond visual stimuli to consider how sounds, smells, and textures contribute to the overall experience of a space (Howes, 2022). This approach underscores the importance of engaging all senses to create a more immersive and meaningful approach by offering participants a curated experience that highlights the sensory dimensions of Budapest's urban landscape.

Urban Walks Series is one of the events organised by KÉK, which invites participants to explore the city's neighbourhoods through guided tours that emphasise not only the visual but also the auditory, tactile, and olfactory elements of the urban environment. These walks are designed to deepen participants' sensory engagement with their surroundings, encouraging them to notice details often overlooked in the hustle and bustle of daily life. With a focus on the sensory experiences that define different neighbourhoods, Urban Walks Series aims to foster a greater appreciation for the diverse sensory landscapes of Budapest and strengthen the connection between people and their environment. Figure 4 illustrates moments from KÉK's urban walks, where participants were encouraged to experience the city through all their senses. The walks included pauses in quiet parks to listen to the subtle sounds of nature, strolls through bustling markets where the smells and textures of local produce were highlighted, and tactile engagements with the varying materials of historic buildings. These multisensory experiences not only provided a richer understanding of the city's urban fabric but also contributed to a stronger emotional connection to the places explored. By integrating sensory awareness into urban exploration, KÉK's Urban Walks Series reinforces the idea that placemaking is not just about physical design but also about creating experiences that resonate on a deeper, more sensory level.



Figure 4: KÉK's Urban Walks Series, highlighting participants' sensory engagement with the city. The walks involved listening to the environment and exploring historic buildings through tactile interactions, emphasising how sensory experiences enhance understanding and connection to urban spaces (Source: Hungarian Contemporary Architecture Centre).

Urban Sustainability

The practice of placemaking involves more than just shaping physical spaces; it extends into the realm of *world-making* – creating new realms and embodying societal visions. Each placemaking endeavour represents our collective aspirations and societal values (Schneekloth & Shibley, 1995). Recognising the role and impacts of placemaking in this regard aims to elevate awareness of nature and sustainability, fostering more responsible societies built on shared interests, values, and mutual responsibilities. By attending to the needs of non-human entities, sustainability is redefined as a community-led endeavour, acknowledging all contributors to the character of space (Miles, 1997). Activities undertaken within this perspective navigate urban complexities through a variety of approaches, providing fresh and applicable solutions to sustainability. Instead of seeing sustainability as a human-imposed obligation, they adopt participatory methodologies that prioritise environmental resources. This includes integrating sustainable practices into daily routines, respecting spatial constraints, and collaboratively progressing

with eco-friendly behaviours. Emphasising shared responsibility promotes a more inclusive and comprehensive approach to placemaking, establishing a harmonious relationship between constructed and natural environments to ensure a legacy for future generations. Moreover, placemaking initiatives that prioritise sustainability concerns can serve as catalysts for broader social change. By involving communities in co-designing their local environments, these initiatives encourage individuals to recognize and take responsibility for the impact of their actions, thereby promoting a collective move towards more sustainable practices. Thus, the integration of *green* practices not only enhances the ecological resilience of urban areas, improves access to green spaces, and reduces the urban heat island effect, but also raises awareness and promotes behavioural change among people.

The placemaking initiative in Ljubljana demonstrated circular design and the reuse of materials in urban design workshop, that move beyond the traditional take-make-waste extractive model. The activity was implemented through a learn-by-design process with a dual objective: firstly, to



Figure 5: Placemaking experiment with urban reuse. Object repurposing has long served an entry point into sustainable design at a micro-scale. It also embodies a broader concept that includes circular design and creative practices, providing individuals to express their innovative ideas and apply them in local environments (Source: Žiga Gorišek).

gain a deeper understanding of the site's physical surroundings, inventory existing materials available for reuse, and insight into the dynamics of the location, including its social context and requirements. Secondly, it aimed to apply the principles of a circular design at a grassroots level, while also raising awareness and offering educational instants about sustainable practices. The workshop acted as a central hub for dialogue, merging professional, experiential, and tacit knowledge, facilitating discussions with experts on architectural reuse, place transformation, and recycling artistry (Figure 5). This initiative prompted critical inquiries into how reuse and recycling can enhance the practice of creative placemaking.

In parallel, KÉK's Community Gardens project in Budapest reflects a similar commitment to sustainability, focusing on the cultivation of green spaces within the urban infrastructure. Community gardens offer an accessible, participatory approach to enhancing urban sustainability, directly involving residents in the care and cultivation of shared green spaces. These gardens serve multiple purposes, including food production, environmental education, and the creation of communal spaces that strengthen social bonds and enhance the quality of urban life.

The initiative goes beyond mere provision of green spaces; it embodies a holistic approach to urban sustainability that integrates ecological awareness with community-building efforts. By

encouraging residents to take an active role in gardening, the project fosters a sense of ownership and responsibility for the environment. It also provides opportunities for learning about sustainable agricultural practices, composting, and biodiversity, making it an educational platform for environmental stewardship. Figure 6 depicts various community gardens across Budapest, illustrating how these spaces have become vital hubs of social interaction and environmental learning. Residents from diverse backgrounds come together to cultivate these gardens, sharing knowledge and resources in a way that strengthens community ties while promoting sustainable living. Through these activities, the project has become a model for how urban sustainability can be achieved through grassroots, community-driven efforts.

Both the Ljubljana initiative by A-Place and KÉK's Community Gardens project thereby highlight the importance of integrating sustainability into the practice of placemaking. While A-Place focuses on the reuse of materials and circular design in urban environments, KÉK emphasises the role of green spaces in fostering environmental awareness and community resilience. Together, these projects illustrate the diverse approaches to sustainable placemaking, showing that sustainability can be achieved through a variety of means, whether through innovative design practices or the cultivation of communal green spaces.



Figure 6: KÉK's Community Gardens project, showcasing various gardens that act as centres for social interaction and environmental education. The initiative promotes urban sustainability by engaging residents in gardening and encouraging ecological awareness and sustainable practices (Source: Hungarian Contemporary Architecture Centre).

Urban Creative Dynamics

As placemaking incorporates creative expressions, art-making becomes a key driver for innovative ideas through hands-on learning. Art conveys ideas and emotions that shape our perspectives; when included in public spaces, it adds meaning, aesthetic value, cultural significance, and emotional impact to the built environment (Nurse-Bray, 2020). Integrating public art thoughtfully can foster a strong sense of place, reflecting the character, context, and history of a location, and enhancing its identity as a visual or cultural landmark (Deutsche, 1998). Meaningful public art not only initiates dialogue, provokes thought, and stimulates emotional response, but also engages the public in discussions about shared values, which are the foundations of communities (Bingham-Hall, 2016). Public art can define a neighbourhood, activate specific areas, rejuvenate neglected or forgotten spaces, and capture

attention and imagination by engaging with culture, history, and societal aspirations. As a place's identity evolves, so too does the community, as different people assign diverse meanings and uses to the same space. Public space becomes a critical medium for this transformation, shaped not only by territorial boundaries but by the collective actions and discourse that occur within it. This dynamic relationship between space and community is reinforced by placemaking initiatives, where the more actively the community participates, the more deeply it shapes its future identity (Rapanta et al., 2021). This approach makes future placemaking more promising, with the potential to repeatedly remake, renew, and reform shared environments.

An interesting example of an artistic placemaking initiative was established in Lisbon's Padre Cruz neighbourhood, showcasing collective artistic production through a prose and poetry contest titled *My neighbourhood, my place*. This contest became



Figure 7: A-Place's placemaking initiative in Lisbon's Bairro Padre Cruz features the "My Neighbourhood, My Place" contest, showcasing community creativity through poetry, writing, and workshops that reflect the unique characteristics of public spaces and strengthen connections among residents (Source: Marta Fiollić).

a central feature in boosting community creativity and engagement through thematic categories such as *Memories of the neighborhood*, *Living in the neighborhood*, *Creating in the neighborhood*, *Being together in the neighborhood*, etc. As a result, Padre Cruz transformed into a vibrant hub of artistic activity, featuring writing, drawing, photography, and recitals. These efforts culminated in a main recital event, creating a lively community atmosphere in a previously neglected square within the neighbourhood. The initiative successfully activated a public space, with residents' involvement bringing them closer to creative processes, reflecting on their daily lives, and civic experiences, and sharing their memories and views (Figure 7). *A Future Place*, one of the umbrella initiatives within Lisbon's Bairro Padre Cruz neighbourhood was born out of the aspirations of Amigos da Luz, a sports community association primarily centred around football. However, beyond the sports engagements, this association evolved into a cohesive community. Shared interests turned into a sense of *home*. This larger, fluid, newly familiar *place* led to a very different kind of expression – through poetry and stories. Drawing and writing are essential tools for accessing, understanding, and materializing mental space (Lagrange et al., 2021). These creative expressions, parallel to the sports practice itself, naturally became a medium for exchanging their collective viewpoints and personal memories. A-Place

seamlessly integrated into this naturally evolving initiative, also collaborating with diverse range of partners. Within the confines of Bairro Padre Cruz, a sequence of events generated, aimed at reaffirming a sense of place identity.

Alternatively, KÉK's Nyitva Festival serves as a vibrant celebration of creativity and community engagement in Budapest, transforming public spaces into dynamic platforms for artistic expression. This festival invites artists, art collectives, architects, and performers to collaborate and showcase their work for richer and deeper cultural dialogues that resonate throughout the city. Nyitva Festival emphasises inclusivity by creating opportunities for local residents in various artistic activities, thereby strengthening community ties and fostering a sense of belonging. The festival embodies the idea that art is a powerful tool for connection, reflection, and cultural identity, similar to the objectives of A-Place's initiatives. Throughout the festival, KÉK funds a moderate amount of the maintenance and repair of abandoned or not-in-use shops and residential areas in the city to temporarily turn them into public spaces which are activated through a range of events, including live performances, art installations, and workshops. These activities encourage interaction and engagement among community members, creating a shared experience that enriches the urban fabric. Given the unconventional spatial



Figure 8: Nyitva Festival, including artistic workshops, cultural dancing, linoleum printing, film screening, and concerts, engages in placemaking efforts by activating underutilised spaces, and transforming these spaces into creative hubs (Source: Hungarian Contemporary Architecture Centre).

settings, artists are invited to present their works, challenging the boundaries of traditional art spaces and bringing creativity directly into the heart of the community. This approach not only showcases artistic talent but also highlights the importance of public participation in shaping cultural narratives and community identity. Figure 8 illustrates the diverse range of activities that took place during the Nyitva Festival. By activating underutilised spaces, the festival transforms the discoloured areas into creative and connecting hubs. The collaborative nature of the festival encourages residents to engage with their environment actively, fostering a sense of ownership and pride in their community. Through workshops and interactive art experiences, participants gain new skills and insights, reinforcing the festival's role as a catalyst for community engagement and creative expression.

CONCLUSION

This comparative study highlights the transformative qualities of placemaking initiatives exemplified by the platforms A-Place and KÉK in their respective urban contexts. The analysis of these initiatives underscores the impact of collaborative, community-driven efforts in revitalis-

ing urban spaces and turning them into vibrant, meaningful places. These endeavours stand in stark contrast to the growth of underutilised spaces, which detract from the distinctive character of both the urban environments and the individuals who inhabit them.

In exploring placemaking practices through four underlying concepts – urban vibrancy, urban sensory engagement, urban sustainability, and urban creative dynamic – this study explains the diverse strategies employed by A-Place and KÉK within their conceptual frameworks. Despite operating within different cultural settings, both platforms share a common goal: to activate urban spaces by engaging communities in the design and implementation of placemaking activities. Their initiatives illustrate how such collaborative efforts can foster a sense of belonging, identity, and ownership among community members.

On one hand, A-Place is a time-bound initiative that operated from 2019 to 2023 and was co-funded by the Creative Europe Program. It now functions as both a platform and community, focusing on interventions across six European cities. This approach allows A-Place to implement experimental placemaking activities tailored to the unique identities and characteristics of various communities and

cultures. On the other hand, KÉK, an independent professional institution, primarily operates in Hungary, particularly in Budapest, concentrating on initiatives that predominantly reflect the city's cultural and historical context. This focus enables KÉK to develop methodologies with a consistent, repeatable structure for its activities, conducted through various annual settings. While these operational features distinguish the two platforms, their shared objective of redefining urban spaces through placemaking underscores their commitment to enhancing the connection between people and places, serving as a counterbalance to the rapid changes and challenges faced in contemporary urban environments.

Both A-Place and KÉK employ dynamic and hands-on approaches that foster collective learning and facilitate interactions between personal experiences and the unique characteristics of urban settings. These platforms challenge conventional spatial practices by promoting the activation of public spaces, transforming non-places into vital areas where authentic connections can succeed. The case studies presented throughout this study reveal how collaborative creativity can effectively navigate the complexities of urban environments, showcasing the potential of placemaking initiatives to enrich community life and enhance urban spaces.

Both initiatives leverage community engagement and place attachment as central in fostering the social inclusiveness and intergenerational dialogue. In this regard, the efforts of A-Place and KÉK highlight the importance of cultural heritage and collective memory in shaping place identity. By focusing

on sensory experiences, these initiatives deepen emotional connections to the urban environment, thus promoting a more inclusive and immersive experience for all residents.

Furthermore, the commitment to sustainability within the placemaking efforts of both platforms reflects an increasing awareness of environmental responsibilities achieved through collective learning and hands-on methodologies. By integrating sustainable practices, A-Place and KÉK demonstrate that grassroots, community-led actions can efficiently address environmental challenges. These initiatives underscore the potential to create a more resilient urban future, where community engagement not only transforms physical spaces but also cultivates environmental stewardship. In doing so, they reinforce the essential connection between sustainable practices and the revitalisation of urban areas, contributing to the broader understanding of placemaking as a vital tool for social, cultural, and environmental enhancement.

This study supports further investigation and application of placemaking strategies that emphasize community involvement, creativity, and sustainability. As urban environments develop, insights from the A-Place and KÉK initiatives can inform future efforts to create liveable spaces. The methodology employed in these initiatives is a transferable component that can be applied with modifications in other cities facing similar challenges. By further exploring these principles, cities can efficiently address the challenges, related to diminished inclusiveness or lack of collective care for the local urban environments.

O PROSTORU: VLOGA KREATIVNIH PRAKS PRI USTVARJANJU URBANIH PROSTOROV

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POVZETEK

Članek obravnava ponavljajočo se razpravo o konceptih prostora, fizičnega in zaznavnega, pri čemer poudarja njihove notranje in medsebojne odnose ter raziskuje, kako ustvarjalne prakse oblikovanja urbanih prostorov vplivajo na razumevanje, konceptualizacijo ter preoblikovanje teh pojmov. Prostor kot posoda fizičnega vključuje številne neotipljive vidike, kot so emocionalni, spominski, učni ali kreativni prostori, ki so ključni za razumevanje njegovega celovitega pomena in vloge za doživljanje s strani uporabnika ali obiskovalca. S primerjalno analizo dveh platform, A-Place (Krepitev vezi med prostori in ljudmi s pomočjo kreativnih praks) in KÉK (Sodobni arhitekturni center Madžarske) študija preučuje, kako dani iniciativi pristopata k ustvarjanju prostorov v različnih evropskih mestih s prepletanjem umetniških in kulturnih praks. Članek skozi prizmo štirih ključnih konceptov dojemanja prostora podaja primerjalni vpogled, ki pomaga razumeti vlogo kreativnih praks v ustvarjanju urbanih prostorov v različnih družbeno-kulturnih in geografskih kontekstih. S preučevanjem primerov iz več evropskih mest študija razkriva prispevek danih praks k socialni in kulturni dinamiki skupnosti ter njihovega vpliva na dojemanje prostora, njegovo identiteto ter trajnostne vidike, ki zaznamujejo kakovost bivanja.

Ključne besede: ustvarjanje prostorov, kreativne prakse, umetniške prakse, urbani prostori, A-Place, KÉK

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received: 2024-03-02

DOI 10.19233/ASHS.2024.30

FORMAL AND INFORMAL NATURAL BATHING SITES AND BEACHES IN THE SLOVENIAN COASTAL ZONE – CHALLENGES IN THE FIELD OF SPATIAL INVENTORY AND PLANNING

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ABSTRACT

The Slovenian coastal zone offers favourable conditions for bathing, which has led to the development of many natural bathing sites and beaches. The article presents the results of the research aimed at recording their legal status, number, extent and capacity. We reviewed official databases, prepared an analysis of the spatial conditions and capacity calculations. The research was based on descriptive and comparative methods and interviews. It was found that there are 17 bathing sites, as recorded in official records, and an additional 29 so-called informal bathing sites located along the entire coastline. The total capacity of all 46 locations is 42,781 bathers. The estimate is almost three times higher than the official data, which addresses the need to upgrade the existing system of spatial recording. Research addresses the analytical approach to assessing conditions in space and contributes to the collection of reliable data.

Keywords: Coastal zone, Natural bathing sites, Beaches, Capacity, Beach Carrying Capacity Assessment, Recording

SITI BALNEARI NATURALI FORMALI/INFORMALI E SPIAGGE NELLA ZONA COSTIERA SLOVENA – SFIDE NEL CAMPO DELL'INVENTARIO E DELLA PIANIFICAZIONE SPAZIALE

SINTESI

La zona costiera slovena offre condizioni favorevoli alla balneazione che hanno portato allo sviluppo di numerose aree di ricezione turistica e spiagge naturali. L'articolo presenta i risultati di una ricerca finalizzata a rilevare la natura giuridica, il numero, l'estensione e la capienza di queste aree. È stata effettuata una revisione dei database ufficiali, un'analisi delle condizioni spaziali e calcoli della capacità. La ricerca è basata su metodi descrittivi, comparativi e interviste. Si è accertato che le zone di balneazione, come censite dai registri ufficiali, sono 17, più 29 zone di balneazione 'informale' dislocate lungo tutto il litorale. La capacità totale di queste 46 aree balneari è di 42.781 bagnanti, la stima è quasi tre volte superiore ai dati ufficiali e risponde alla necessità di aggiornare il sistema esistente di registrazione spaziale. Questo studio, quindi, affronta l'approccio analitico alla valutazione delle condizioni nello spazio e contribuisce alla raccolta di dati affidabili.

Parole chiave: zona costiera, siti naturali di balneazione, valutazione della capacità di carico antropico delle spiagge, registrazione spaziale

INTRODUCTION

The sea coast is an attractive environment for the development of various tourism, sports and recreational activities. Among the primary uses of this space are also natural bathing areas with their functional and scenic features and a strong place-making role. Swimming, sunbathing and leisure time activities in the marine environment have been present since the very beginning of the urbanization of the sea coast. For this purpose, numerous public and private coastal bathing sites or beaches have been established in the area (Cori, 1999; Vaz et al., 2008). Their planning and management, however, present a particular challenge in the context of complex spatial land uses and the development of modern spatial planning acts. Beaches and other bathing areas are, in principle, open public or semi-public spaces that must ensure different conditions regarding accessibility, safety, functionality and infrastructural support (Micallef & Williams, 2002; Rapanta et al., 2021).

In the coastal zone of Slovenia, systematic recording of the spatial conditions, coordination of sectoral interests and consequent spatial planning have become very intensive in the last twenty years. This has been accompanied by increasing investment pressures on the coastal area, procedures in the framework of the preparation of the new generation of spatial planning acts and Slovenia's participation in international projects aimed at the development of maritime spatial planning (MSP, 2014) linked to integrated coastal zone management (ICZM, 2009; Čok et al., 2021). In 2021, Slovenia adopted its first maritime spatial plan (MSP), which defines the uses of space at sea in more detail and also coordinates them with the land-based uses. The plan strongly emphasises the public interest in the sea as a public good, as well as the importance of nature protection in a broader sense. It defines measures to ensure the good condition of the sea and the marine environment (MSP, 2021). The plan is drawn up at a strategic level, defining precisely the administrative sectoral authorities and at the same time transferring the more detailed, executive tasks of spatial planning to the municipalities. These tasks include the planning and management of natural bathing areas, which presents a special challenge to municipalities. In this context, the aspect of ensuring safety against drowning, hygiene standards, support services and traffic accessibility is especially important. All this raises a number of questions concerning the dimensioning of bathing areas, the planning of supporting infrastructure and the award of concessions to appropriate managers. A particular challenge is to produce an assessment of the carrying capacity of the space (for the sea

and the coastal zone), which is now a priority for all maritime countries in the Mediterranean (UNEP-PAP/RAC, 1997; UNEP-WTO, 2005, MSP, 2014).

Even before and during the preparation of the plan, it became clear that there were many data gaps in this field. That was mainly due to the previous practice of partial planning and management of many bathing areas (Čok & Plazar, 2018). However, this observation does not only apply to Slovenia, but also more widely (ADRIPLAN, 2014; PORTODIMARE, 2021). Recording of the spatial conditions showed that bathing and sunbathing activities in the coastal zone are present in various locations and not necessarily only at formally designated bathing areas, where sampling of sea water quality and appropriate safety measures are ensured. The general public has thus, in certain cases, appropriated the coastal space and ensured the exercise of their interest in swimming at will.

Chronology of recent urbanization of the Slovenian coast

The Slovenian coastal area is located in the southwestern part of Slovenia and borders the Republic of Italy and the Republic of Croatia both on the sea and on land. Geographically, it includes the wider coastal strip of Slovenian Istria, which borders the Adriatic Sea to the west. Administratively, it belongs to the Obalno-kraška statistical region and is divided into four coastal municipalities (Ankaran, Koper, Izola, Piran) with a total of 91,600 inhabitants. The length of the Slovenian coast is 46.7 km.

The basic guidelines for the urbanisation of the Slovenian coast are presented in the regional spatial plan by architect Edo Mihevc. In 1963, he outlined the key development activities in the area (settlement, economy, tourism, etc.), both in terms of scale, distribution and interconnection (Kresal, 2016). In the following decades, implementation of this concept was carried out through local municipal spatial plans and implementation projects (Ažman Momirski, 2015). Thus, in addition to the traditional bathing sites in the then existing settlements, alternative locations of natural bathing sites began to develop, following the planned placement of tourism in the area or simply the expansion of settlement areas along the coastal strip. We can say today that the targeted urbanization of the entire Slovenian coast took place relatively quickly. It is also a fact that in the period after independence (1991), interest in the coastal area increased intensively. This was followed by a period of insufficiently coordinated use of the coastal area for the needs of nautical tourism, accommodations, second homes, mariculture and transport infrastructure. This is also evidenced by the fact that coastal municipalities

have been relatively unsuccessful in the past decades in adopting new municipal spatial planning acts mainly because of the administrative or political inability to effectively coordinate interests in the coastal zone (Bucik Ozebek, 2021). The practice of poorly coordinated use of space on the coastal strip has been now at least partially improved by the maritime spatial plan, which imposes new challenges on municipalities within the framework of the authorities and tasks of spatial planning at the local level.

Development and planning of tourism, assessment of the carrying capacity of the area and data reliability

Bathing is one of the coastal tourist activities that can only be carried out in this environment. Tourism, as a desirable economic branch, needs to be provided with the appropriate conditions for its development. However, tourism also has adverse effects (Almeida et al., 2017). In this context, awareness of the need to study the carrying capacity of space and assess the environmental impacts has been present in science and the profession for decades. The initial studies addressed in particular the problem of the concentration of visitors at a particular location and the resulting conflicts. Different studies distinguish between conflicts in the field of supporting infrastructure, conflicts as a result of too little open public space (movement, socializing, sunbathing, swimming) and, of course, conflicts with the protection regimes of the marine environment (CEETO, 2018). In this context, beaches and bathing sites represent special tourist areas with the highest concentration of visitors (Figure 1 & 2).

One of the first more comprehensive studies, with recommendations for spatial planning and tourism planning, is the study *Defining, Measuring and Evaluating Carrying Capacity in European Tourism Destinations* (2001), which, in addition to the various impacts of tourism on space, also highlights the need to define appropriate indicators for the assessment preparation. Also, in a well-known expertise (Klarić et al., 2003), based on several case studies (test areas) of preparation of the assessment of physical carrying capacity (examples from Spain, Italy, Egypt, Albania, Greece, Malta and Croatia), the authors conclude that it is not possible to define a uniform methodology for the preparation of the assessment, since the test cases and the availability of data are very different. Both studies emphasise the need to obtain and use reliable data about space, the environment, visitors, tourist infrastructure, etc. Over the next two decades, a number of Mediterranean countries implemented various international projects aimed at supporting the development of

maritime spatial planning and environmental protection to implement the principles of sustainable development. Great emphasis has been placed on the establishment of appropriate databases and methodologies for planning the activities at sea and onshore (Čok et al., 2021).

Challenges in the planning and management – Beach Carrying Capacity Assessment

In this context, a special place is given to Beach Carrying Capacity Assessment which addresses the assessment of spatial capacity from the points of view of the functional design of the beach (Pereira da Silva, 2002), the physical stability of the terrain and coastal morpho-dynamics (Tejada et al., 2009), and the socio-cultural and psycho-ecological capacity to carry out ecosystem management (Zacarias et al., 2011). It is very important to have reliable data and indicators when making such an assessment (Navarro Jurado et al., 2012). An example of good practice in carrying capacity assessment is a study carried out in the Monte Hermoso area (Huamantín Cisneros et al., 2016). In it, the authors carefully studied the capacities of beaches in the test area. In doing so, they used various tools, such as area calculation, visitor count, video approach, etc. They even defined the movement of visitors in the beach area at different time intervals of the day. The study identified the different determined areas per visitor (e.g. 5 m², 10 m², 25 m²) as the necessary starting point for coastal zone management. In another study (Rodella et al., 2020), the authors use test cases in three Italian regions to examine different parameters and capacities in order to assess the economic value of a particular beach. In this respect, their location (relative to the urban environment and access) and their spatial extent (physical capacity defined by the maximum number of visitors) play an essential role.

All of the above addresses the challenges of data gaps, as countries still face unknowns and rapidly changing spatial conditions when managing coastal areas (including beaches and bathing sites).

For the Slovenian coast, a detailed analysis of the situation in the area of natural bathing sites has not yet been carried out. However, the Regional Strategy for Sustainable Tourism of South Primorska was prepared in 2006, which addresses the listed challenges and also provides specific assessments regarding the current capacities of individual coastal bathing sites. Yet, the data used in this study are limited to sectoral records covering only certain bathing areas. Later, a study on the carrying capacity of Slovenian Istria for tourism (Jurinčič, 2009) was also prepared, which represents a very analytical approach to the treatment of tourism and also in-



Figure 1 & 2: Seaside bathing site – Krka beach – Health Resort, Strunjan: an example of a bathing site with all typical elements (areas for swimming, movement, sunbathing, social contacts, gastronomic infrastructure, etc.) (Photo: Čok, 2023).

cludes the field of bathing areas. The study provides specific capacity estimates, referring to older data sources, but the methodology for calculating the extent of individual beaches or bathing areas is not specified in the study. The study of tourist migrations on the Slovenian coast and the importance of the distribution of attractive elements in the coastal strip was also carried out by Andrade Sierra (2022). Unfortunately, her study is limited to the test area and does not cover the entire coastal zone. This study also highlights the lack of up-to-date spatial data and the limitations of official records.

MATERIAL AND METHODS

Problem Definition and Research Questions

As outlined above, the planning and management of natural bathing sites presents various challenges. From the point of view of the municipal strategic spatial planning acts, their locations must be justified by the objectives of spatial development and appropriately placed in the space. At the implementation level, first the appropriate land use must be ensured and the project documentation prepared only later. The third challenge is finding a suitable manager (concessionaire) to ensure the operation and management of the bathing site. On the Slovenian coast, there is a relatively large number of natural bathing sites, as the primary activity in the coastal strip is tourism, and the physical space allows bathing and sunbathing activities to a large extent. A special challenge is the seasonal appearance of visitors, who quickly overload the transport network in a wider area and occupy large parking areas. The consequences of seasonal peaks are also reflected in the ever-increasing conflict between residents and external visitors (Cigale, 2012), and in locations not primarily intended for bathing that have been usurped by local and external bathers. In this respect, stakeholders in the process of spatial planning are primarily faced with the problem of the uncertain status of individual bathing sites, or those sites that in a formal sense are not at all intended for bathing. To understand the situation in the area and to take decisions on future supervision in the area, it is first necessary to have reliable data on the number, location, capacity and status of individual natural bathing areas. This is the task of the local communities, i.e. the responsibility for detailed planning in the coastal zone as determined by the plan (MSP, 2021). In this context, the following research questions are relevant:

What types of bathing sites exist on the Slovenian coast and who keeps records of their condition?

What is their number, spatial extent and capacity?

Methodology

The research focused on the study of natural bathing sites, more specifically their legal status, terminology, number, spatial extent and capacity. It was carried out in three phases.¹

In the **first phase**, the features of the bathing sites, according to their legal status, were identified. The first step covered a review of the legislation on water and coastal land (Water Act, 2020; Spatial Planning Act, 2021), using the descriptive method and guided by those provisions which classify the typology of natural and other bathing sites. In the second step, an analysis of the municipal spatial planning acts, databases and other documents dealing with natural bathing sites in the area of all four coastal municipalities (Ankaran, Koper, Izola, Piran) was carried out. The focus was on defining the concepts of legal status and the terminological designation of all types of bathing sites.

In the **second phase**, the spatial conditions were recorded. The starting point were the current spatial planning acts of the municipalities, the MSP and the databases of the Slovenian Environment Agency (ARSO). The data were upgraded through fieldwork (site visits) and a call to representatives of local communities and bathing site managers to provide the spatial framework of all locations where bathing activities take place. The spatial dimensions of all bathing sites (land outline) were defined in two coordination meetings with all participants in the MSP-MED project (Čok et al., 2022), using the land use and others GIS database. Certain tolerances had to be taken into account (not updated or mutually inconsistent databases), but according to the participants, the deviations in the results were less than 5%.

In the **third phase**, the capacity of all bathing sites was calculated. In a first step, data from the official bathing site registers maintained by the ARSO and additional data from the managers of the bathing sites were obtained. In the second step, the size calculation in m² was carried out for all bathing sites, followed by a capacity calculation in relation to the maximum number of bathers, using the applicable standards setting out the conditions for safety against drowning. Of particular relevance here were the Rules on technical measures and requirements for the safe operation of bathing sites and for protection against drowning in bathing sites (2007), which for

¹ Note: Regarding the numerical data, the article refers to the results of the project Information Support for Maritime Spatial Planning at Local Level: Spatial Planning in the Coastal Zone developed in the framework of MSP-MED (Čok et al., 2022).



Figure 3: Simon's Bay Beach, Izola, as a formal bathing site listed in the official registers (Photo: Čok, 2023).

the land part specifies an area of 7 m² for each bather as the minimum standard necessary for the proper implementation of sunbathing, relaxation and rest activities. In the third step, the partial results were synthesised and the key findings presented using the comparative research method.

RESULTS

Legal status and terminological definitions of natural bathing sites

Based on a review of a number of sources, it was found that there are different records of bathing sites for the Slovenian coast. Particularly crucial were the records kept by the institutions within their respective authorities and tasks, i.e. the Environment Agency of the Republic of Slovenia (ARSO), Ministry of Natural Resources and Spatial Planning, local communities (municipal services) and individual bathing site managers (concessionaires). In addition, a number of other records held for their own purposes by tourist associations, agencies, spatial development projects, etc., which also included certain data on individual bathing sites, were examined.

At the beginning of the discussion, it is necessary to first draw attention to terminological consistencies. The basic definition distinguishes swimming pools and natural bathing areas. Swimming pools are indoor and outdoor swimming pools. Natural bathing areas are

bathing sites in the sea, on still and moving waters (MSP, 2021). In practice, the term beach is also used colloquially for natural bathing areas. Of course, it is necessary to distinguish between their land and water parts. As a rule, the water part is declared as bathing water, which means that seawater quality monitoring is carried out in these areas, and as such they are intended for bathing. Bathing waters are defined sequentially, but this does not mean that bathing areas or beaches are formally defined on the whole bathing water sequence.

Based on a review of the available sources (Water Act, 2020; Act on Protection Against Drowning, 2007; MSP, 2021; Atlas of Waters, 2023), which determine the status of water and land areas, as well as their location and spatial extent, the following three definitions were found:

1. **Bathing waters** and **bathing areas**, as defined by law and as determined by official records in the area (bathing waters shall be waters where a large number of people bathe or are expected to bathe, or where bathing is practiced as a direct water use for bathing area activities, and where bathing is not permanently prohibited or permanently advised against. A bathing area shall be the bathing water area where a large number of people bathe or are expected to bathe, or where bathing is not permanently prohibited or permanently advised against, including the appertaining waterside land (summarized by Water Act, 2020 and Act on Protection Against Drowning, 2007)).

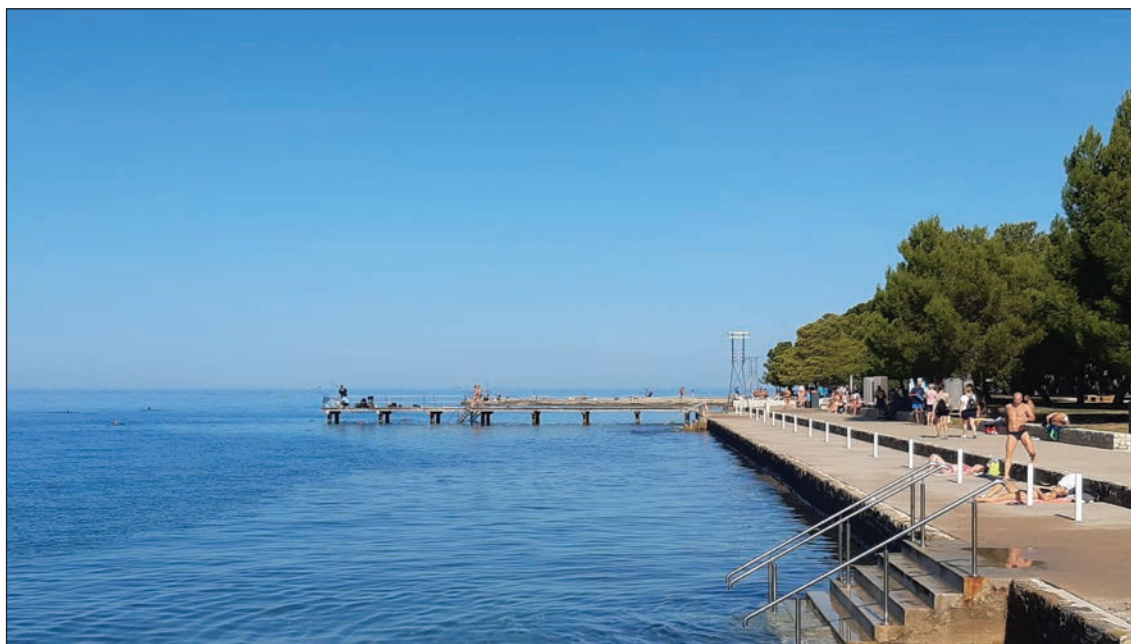


Figure 4: Bathing site Pod Belvederjem, Izola, as an informal bathing site not listed in the official registers (Photo: Čok, 2023).



Figure 5: Bathing area Salinera - Pacug, Piran, as an informal bathing area not listed in the official registers (Photo: Čok, 2023).



Figure 6: Bathing area Salinera - Pacug, Piran, as an informal bathing area not listed in the official registers (Photo: Čok, 2023).

2. **Areas of natural bathing sites** with a water permit,² as defined by law and listed in the Atlas of Waters and other official records (a natural bathing area shall be a bathing water area where bathing is practiced as a direct water use for bathing area activities and in accordance with the regulations governing protection against drowning, including the appertaining infrastructure (summarized by Water Act, 2020 and Act on Protection Against Drowning, 2007)).
3. **Other areas** where bathing activities are also carried out (other bathing sites) but are not registered in official records and do not have a water permit. The local communities alerted us of their

occurrence (exact location and extent) and also provided us with detailed information.

In the material under consideration, various terms or colloquial terminology were also found in the official records. Among them are terms that separate water and land parts, or combine them, e.g.: sea bathing place, beach, beach arrangement, beach area, beach for swimming, sea for swimming, etc.

On the basis of the above, therefore, a distinction must be made between: (a) those bathing areas (or sites) listed in the official registers (formal bathing areas or sites Figure 3 & 4) and (b) all the others (informal bathing areas or sites, Figure 5 & 6).

² In Slovenia, a water permit is a special permit that must be obtained for a certain special use of water, e.g. for technological purposes, bathing, ports, commercial use, etc. It therefore serves to control and regulate the use of large amounts of water or to use it for special purposes. The water permit can also determine the obligation and method of monitoring natural phenomena related to the special use of water or marine resources, as well as monitoring the impact of facilities and devices on the water regime.

Inventory of natural bathing areas and sites in official records and other sources

Based on the analysis of cartographic data and statistical records, and interviews with representatives of local communities (official records and informal sources), we found that in the area of all four coastal municipalities there are: 21 bathing water areas (water part), 17 natural bathing sites in the bathing water area (with and/or without a water permit) and additional 29 other bathing sites (without a water permit and/or without an entry in official records). The proportional share of the latter is particularly surprising, as spatial planning acts and sectoral records have been in force in Slovenia for decades. Table 1 gives the names of bathing waters and bathing areas as given in official records (all bathing locations are listed in Table 2). The share of those included in the registers but do not currently have a valid water permit is also surprising. It can be seen that these registers also lack harmonised terminology (e.g. bathing water No 10 where the term 'beach' is used for bathing water).

It can also be seen that in most cases the designation of bathing water follows the designation of the tourist complex in question on the coast. This is a consequence of the already mentioned concept of urbanisation of the Slovenian coast, in which the use of land and sea was coordinated at least in the initial phase.

Overview of the spatial conditions and the calculation of spatial extent and capacity

In the third part, the research focused on recording the actual spatial conditions. In the first step, all existing bathing areas (formal and informal) in the area were located and recorded, using various sources. The following was noted:

Municipality of Ankaran

In the coastal strip of the Municipality of Ankaran (Figure 7) there are two bathing sites listed in official records, i.e. Debeli Rtič and Adria. There are other seven areas or sites where bathing is also practised. In spatial terms (accessibility, slope of the hill, availability of space), a considerable part of the coastline in this municipality is suitable for bathing, so it is not surprising that bathing activities take place in many locations in both the northern and southern part of the Ankaran Peninsula. The highest pressure was recorded at Debeli Rtič, around which bathing waters have been officially declared. From the point of view of traffic accessibility, the coastal strip of the municipality is closest to the central part of the national territory, from where most one-day visitors come.

City Municipality of Koper

The coastal strip of the Municipality of Koper has the fewest bathing locations of all municipalities. There are two bathing sites directly adjacent to the town of Koper, which are listed in the official registers (Koper City Bathing Site and the Koper-Izola Bathing Area). There are two more bathing areas without formal status in the direction of Izola. A large part of the coastal strip in the area of the municipality is occupied by the Port of Koper, so bathing is limited only to the area west of the city. In this part, substantial expansions of bathing areas are planned (in formal terms, but in fact they already exist), as with the new spatial arrangements the coastal strip between Koper and Izola will be focused on recreational and leisure activities. The Koper bathing sites are also attractive because of other urban functions of the city, as being the central administrative and economic centre of the Slovenian coast. With the future development of the area of the former Koper-Izola coastal road, the attraction of this area will be further enhanced.

Municipality of Izola

In the coastal zone of the Municipality of Izola (Figure 8) there are many bathing sites and areas, mainly due to the favourable spatial conditions and the traditional tourist orientation of the town of Izola. Of these, three are included in the formal registers (Beach for the Blind and Visually Impaired, the bay of Delfin and Simon's Bay) and there are eight other locations where intensive bathing is practised. In the Municipality of Izola, bathing waters have also been declared on most of the coastal strip, which further stimulates this activity. In fact, only the coast directly in the marina area is exempted from bathing waters. The greatest additional potential is the area of the coastal road in the direction of Koper, which both municipalities manage with a common approach and coordinated programme concept (regulated bathing sites are a priority).

Municipality of Piran

The Municipality of Piran, with the conurbation of Piran - Portorož - Lucija, is the central destination of Slovenian coastal tourism. Its coastal strip has the largest number of bathing sites and areas (among all the municipalities) with a total of twenty-two. Ten bathing sites are included in the official registers (Krka Strunjan, Salinera, Pacug, Fiesa, Bernardin, Vila Park Hotel Beach, Meduza, Portorož Central Beach, Lucija Beach and Lucija Campsite), and an additional twelve sites have been registered.

Table 1: List of bathing waters and bathing sites as recorded in the official records (Source: Čok et al., 2022).

Bathing water no.	Municipality	Bathing water (official name)	Bathing area / site (with water permit)
1	Ankaran	Debeli rtič bathing area	DEBELI RTIČ NATURAL BATHING AREA*
2	Ankaran	RKS MZL Debeli rtič natural bathing area	RKS MZL Debeli rtič natural bathing area
3	Ankaran	Adria Ankaran bathing site	Adria Ankaran bathing site
4	Koper	Koper city bathing site	Koper city bathing site ("Mokra mačka")
5	Koper	Žusterna bathing site	Žusterna bathing site**
6	Koper/Izola	Žusterna bathing site - AC Jadranka	**
7	Izola	Pri svetilniku bathing area	Pri svetilniku bathing area
8	Izola	Delfin natural bathing area	Delfin natural bathing area
9	Izola	Bathing area Rikorvo - Simon's Bay	***
10	Izola	Simon's Bay Beach	Simon's Bay Beach
11	Izola/Piran	Bathing area Simon's Bay - Strunjan	***
12	Piran	Seaside bathing site - Krka beach - Health Resort Strunjan	Seaside bathing site - Krka beach - Health Resort Strunjan
13	Piran	Salinera natural bathing area	Salinera natural bathing area
14	Piran	Bathing area Salinera - Pacug	Bathing area Salinera - Pacug****
15	Piran	Bathing area Fiesa - Piran	Bathing area Fiesa - Piran****
16	Piran	Grand Hotel Bernardin beach	Grand Hotel Bernardin beach
17	Piran	Vila Park Hotel beach	Vila Park Hotel beach
18	Piran	Hoteli Morje bathing site	Hoteli Morje bathing site
19	Piran	Portorož central beach	Portorož central beach
20	Piran	Metropol Portorož natural bathing area	Metropol Portorož natural bathing area
21	Piran	Lucija Campsite natural bathing area	Lucija Campsite natural bathing area***

* the only one that has a proper name, the other bathing areas are unnamed

** Part of the bathing water is located in the Žusterna bathing water (most of it), and the other part in the Jadranka AC (a small part)

*** no bathing site with a water permit on record

**** extraction only-Pacug; no water permit (Fiesa)

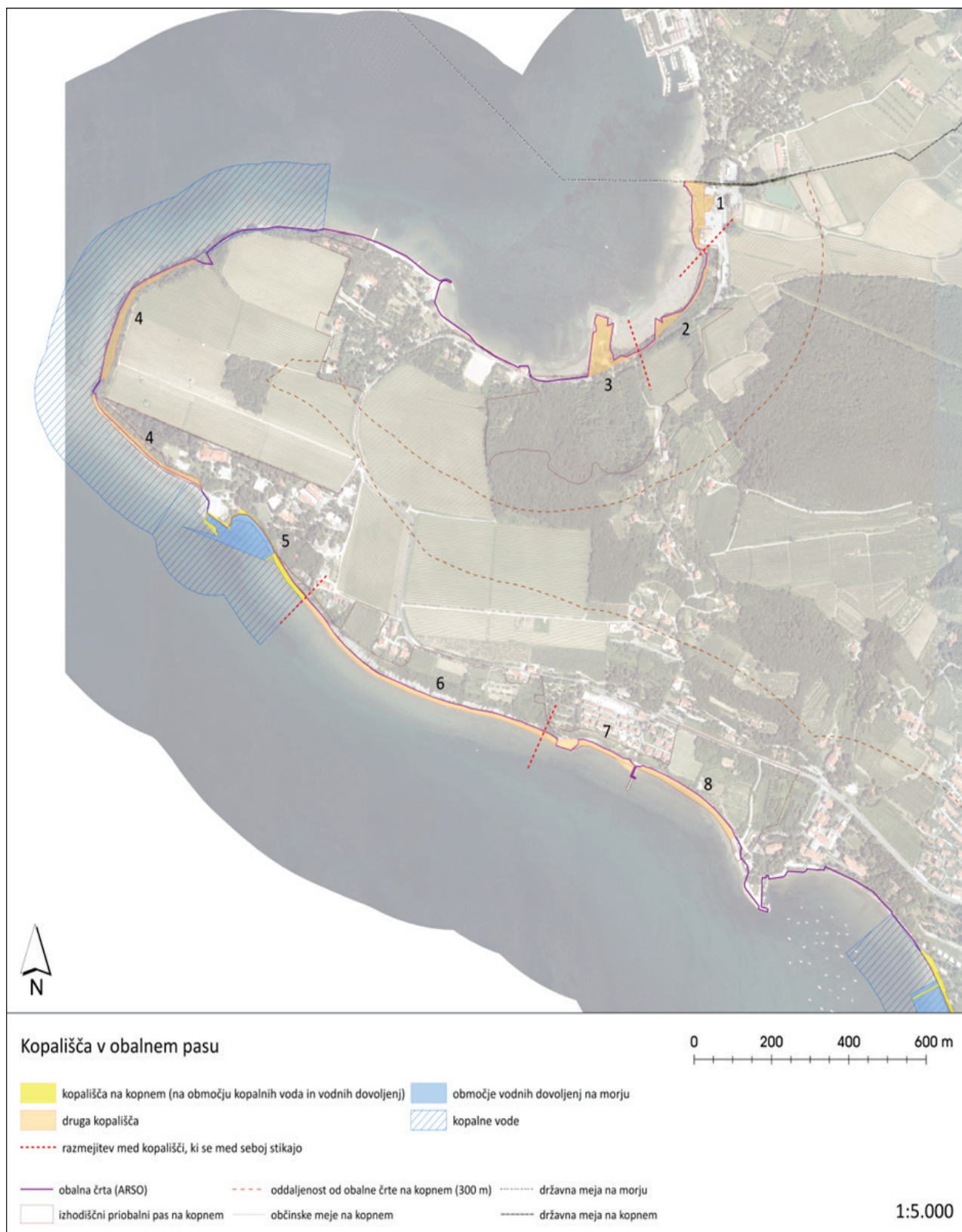


Figure 7: Bathing areas and sites in the Municipality of Ankaran (section), an example of the recording of the spatial conditions (Source: Čok et al., 2022).

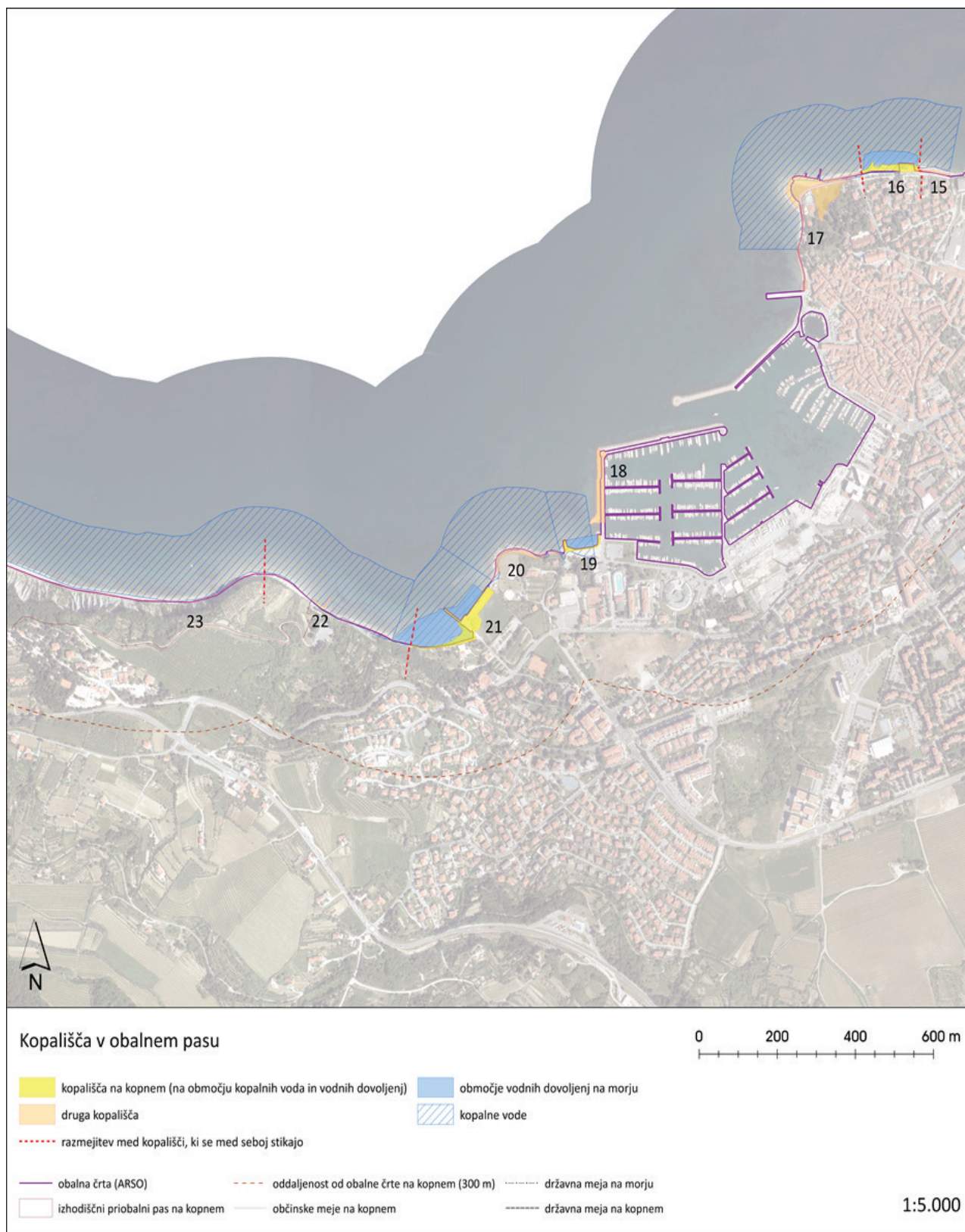


Figure 8: Bathing areas and sites in the Municipality of Izola (section), an example of the recording of the spatial conditions (Source: Čok et al., 2022).

However, a considerable discrepancy was found between bathing waters and the situation on land, which is clearly a consequence of the current lack of coordination between maritime and land-use spatial planning. The central area for sunbathing and bathing is the coastal area in the settlement of Portorož, which, in addition to the most favourable spatial conditions (a closed bay protected from winds and waves, low sea level, etc.), also offers the highest density of tourist activities and services (accommodation, catering, entertainment, etc.).

Calculation of the capacity of natural bathing sites and areas

In the next step, we synthesised data on the location and status of all bathing sites and areas and identified their capacity. In the first part, we summarised the data from the official records, which are mainly held by the managers and the competent services. Unfortunately, in certain cases, the data were incomplete or not available, so we made our own calculation. We defined the size of the bathing areas on land and used the current standard of 7 m² per bather as the minimum area laid down in the regulations. We also calculated the length of bathing waters, as noted in the official records.

Regarding the size of bathing waters, the following findings were made:

The starting point for the calculation of bathing waters is the length of the coastline (ARSO), namely 52.641 km. The total sum of all 21 bathing water areas (projection to the coastline) amounts to 16,509 km. This means that more than a third (31.3%) of the coastline offers conditions for bathing or for the development of natural bathing sites (and areas) from the point of view of bathing water quality.³ This naturally raises an interesting question: why are bathing waters declared on such a large scale if there are no bathing facilities planned on land?

In terms of the size and/or capacity of the natural bathing sites, the following findings were made:

- A collection of data on the capacity of bathing sites or areas from official records was produced by ARSO in the years 2008–2011 and can be found in the Profiles of Sea Bathing Waters (2023). According to these data, the total capacity of the 21 listed bathing sites is 14,400 bathers.
- In the course of work, and in particular in consultation with both the representatives of the local communities and the representatives

of the ARSO and the operators of the bathing sites or areas, we found that the data were not updated and/or significantly deficient and therefore did not constitute an appropriate starting point for the definition of actual capacities. As such, they merely reflected the situation more than ten years ago, and only for certain bathing sites.

- In order to produce an accurate assessment of individual bathing sites or areas, it would be necessary to analyse the spatial situation of each individual location, taking into account various parameters such as: project documentation (where available), count of visitors at different time intervals, verification of land ownership, compliance with the strategy and the intended use outlined in municipal spatial planning acts, integration with the public transport network (Huamantínco Cisneros et al., 2016), etc. Such an analysis was beyond the financial and time frames of the study in question and was therefore not carried out.
- However, an indicative capacity calculation was carried out using the standard of 7 m² per bather (Table 2)⁴. The gross surface of bathing areas from official records (plan view of natural bathing areas) and also all other bathing areas not evidenced in official records were used as project area (Figure 9). The definition of these other locations was carried out by the local communities, who monitor the situation in the area. The assumption was that only the width of 1 m of the coastal strip was taken into account as the actual or potential width of the bathing site in the locations directly under the steep cliffs (the influence of tides occurs in six cases).

On the basis of this calculation, it can be concluded that (Table 3):

- the total capacity of the so-called natural bathing areas and sites in the bathing water zone (with a water permit) is 1,711 bathers in the Municipality of Ankaran, 2,441 bathers in the Municipality of Koper, 1,193 bathers in the Municipality of Izola and 17,236 bathers in the Municipality of Piran, or 22,609 bathers in all four municipalities for a total of 17 bathing areas;
- the total capacity of the so-called other (informal) bathing areas and sites is 3,570 bathers in the Municipality of Ankaran, 5,180 bathers

³ In bathing water areas, competent institutions carry out monitoring and publicly publish data.

⁴ In the eight highlighted (*) cases, due to the unique spatial conditions (a narrow coastal strip beneath the cliffs, further restricted by the tide), a reduced area of a 1 m wide coastal strip was taken into account in the capacity calculation. The bathing area number 13 is partly in the municipality of Koper and partly in the municipality of Izola, in the numerological sense it is treated as one, that is why there are 45 and not 46 locations in this list.

Table 2: Overview of the names, sizes and carrying capacities of all bathing locations, based on the 7 m²/bather approach (Source: Čok et al., 2022).

Id	Name Bathing site / area / beach (all) Has a valid Water Permit (WP)	Municipality	Surface area (m²)	Surface area (m²)* reduced	Max no. of bathers (7 m²)
1	Lazaret 1	Ankaran	5392.4	-	770
2	Lazaret 2	Ankaran	2943.1	-	420
3	Lazaret 3	Ankaran	7077.8	-	1011
4	Debeli rtič*	Ankaran	11330.3	788.65	112
5	Debeli rtič (WP)	Ankaran	3035.4	-	434
6	Under the vineyards (pod vinogradi)*	Ankaran	8377.5	709.4	101
7	Existing student beach (plaža študent)	Ankaran	3767.2	-	538
8	Oltra	Ankaran	4316.3	-	617
9	Adria (WP)	Ankaran	8946.6	-	1278
10	Koper city bathing site ("Mokra mačka") (WP)	Koper	5876.7	-	840
11	Semedela bathing area (Seaside Park)	Koper	34930.5	-	4990
12	Žusterna bathing site (WP)	Koper	11210.8	-	1602
13	Bathing area Koper - Izola (in the City Municipality of Koper)*	Koper	6179.3	1337.6	191
13	Bathing area Koper - Izola *	Izola	9078.4	1455.8	207
14	Jadranka	Izola	8861.7	-	1266
15	"Šampjera" by the cliff	Izola	465.4	-	66
16	Beach for the Blind and Visually Impaired (WP)	Izola	2158.7	-	308
17	Lighthouse (Svetilnik)	Izola	8445.4	-	1206
18	Jetty (Valobran)	Izola	3686.7	-	527
19	Delfin (WP)	Izola	732.9	-	105
20	"Pebble beach" ("Na kamenčkih")	Izola	1538.2	-	220
21	Simon's Bay (WP)	Izola	5463.2	-	780
22	Pod Belvederjem*	Izola	618.0	415.5	59
23	Strunjan	Izola	2101.1	-	300
24	Krka Strunjan (WP)	Piran	14967.3	-	2138
25	Salinera (WP)	Piran	17245.6	-	2464
26	Bathing area Salinera - Pacug*	Piran	1195.3	597.1	85
27	Pacug (WP)	Piran	5293.0	-	756
28	Area used for bathing Pacug - Fiesa*	Piran	1037.2	520.1	74
29	Fiesa (WP)	Piran	13821.6	-	1975
30	Bathing area Fiesa - Piran*	Piran	2449.8	1225.2	175
31	Punta	Piran	8667.6	-	1238
32	Riviera - Fornače	Piran	4052.9	-	579
33	Fornače	Piran	1784.1	-	255
34	Bernardin (WP)	Piran	4743.4	-	678
35	Lepa Vida	Piran	4551.1	-	650
36	Vila Park Hotel beach (WP)	Piran	11853.9	-	1693
37	Children's beach at the club	Piran	1111.0	-	159
38	Korotan	Piran	2818.4	-	403
39	Meduza (WP)	Piran	10863.7	-	1552
40	Portorož central beach (WP)	Piran	19316.2	-	2759
41	Lucija Beach (WP)	Piran	19959.1	-	2851
42	Marina 1	Piran	1981.7	-	283
43	Marina 2	Piran	4417.2	-	631
44	Lucija Campsite (WP)	Piran	2779.8	-	397
45	Seča	Piran	21707.5	-	3101

in the Municipality of Koper, 3,851 bathers in the Municipality of Izola and 7,632 bathers in the Municipality of Piran, or 20,235 bathers in all four municipalities for a total of 29 bathing locations;

- the total capacity of all bathing locations (those included in the official registers and all others) is thus 42,781 bathers. This estimate is significantly higher than the previously stated 14,400 bathers (ARSO).

It should be stressed that this total represents a theoretical maximum which in practice would probably be difficult to reach, let alone exceed. In fact, the capacities of formal bathing areas are already very large, which is also pointed out in the Regional Strategy (2006).

DISCUSSION

The results shown represent a comprehensive cross-section of the situation in the field of natural bathing areas and bathing sites, both from the point of view of official records and the actual situation in the physical space (situation in 2022). Although the quantitative data (number of bathing areas, sites, their surface area and capacity) are methodologically generalised, we believe that they give a sufficient overview of the real spatial potential and the need for further improvement of the existing system of their recording.

To carry out a more precise analysis or even an assessment of the carrying capacity of an individual bathing location, other parameters would also have to be taken into account and a number of specific data on the area and visitors would have to be obtained, which was not covered by

this study (Huamantín Cisneros et al., 2016). The implementation of such an assessment is associated with certain financial, time and other challenges. At least mention should be made here of the eventual capture of data by means of video technology, as one of the most effective methods of monitoring the situation in bathing sites (stationary cameras, drones, sensors, etc.), which, on the other hand, is questionable from the point of view of the competences for implementation, the interference with personal data, etc. The question is also raised from the point of view of expediency, since many bathing sites, in particular formal ones, have already been placed chronologically in a certain environment and have become an acceptable fact for other interests in the narrower environment. Nevertheless, their capacities and potentials are sufficiently well known to the operators.

A bigger problem are informal bathing areas and sites, which as a rule lack adequate support infrastructure and monitoring. An additional problem is their geographical dispersion. On the one hand, this situation offers greater possibilities for exercising the right to bathe and thus the right to use the sea and the coast (Gosar, 2000) as a public good (civil right) (Alterman & Pellach, 2022). On the other hand, this dispersion may present more possibilities for the emergence of negative environmental impacts, such as uncontrolled accumulation of waste, the construction of unauthorised swimming piers and boat ramps, uncontrolled parking on agricultural land, etc. These problems are pointed out by both citizens and local communities, who are faced with an uncontrolled situation in the area, especially during peak seasons (Cigale, 2012). Additional conflicts also arise in the field of navigation safety, as bathers interfere with the navigation

Table 3: All bathing sites (locations) capacity per municipality and in total (Čok et al., 2022).

	Ankaran			City Municipality of Koper			Izola			Piran			TOTAL		
	number	surface area (m ²)	no. of bathers m ^{7/2}	number	surface area (m ²)	no. of bathers m ^{7/2}	number	surface area (m ²)	no. of bathers m ^{7/2}	number	surface area (m ²)	no. of bathers m ^{7/2}	number	surface area (m ²)	no. of bathers m ^{7/2}
A: bathing sites with bathing w./ water permit	2	11982.0	1711.7	2	17087.5	2441.1	3	8354.8	1193.5	10	120843.5	17263.3	17	158267.8	22609.5
B: other bathing sites	7	43204.6	3570.0	2	41109.8	5180.8	8	34794.8	3851.6	12	55773.7	7632.6	29	174883.1	20235.0
<i>total</i>	9	55186.6	5281.7	4	58197.3	7621.9	13	43149.7	5045.2	22	176617.2	24896.0	46	333150.9	42781.9

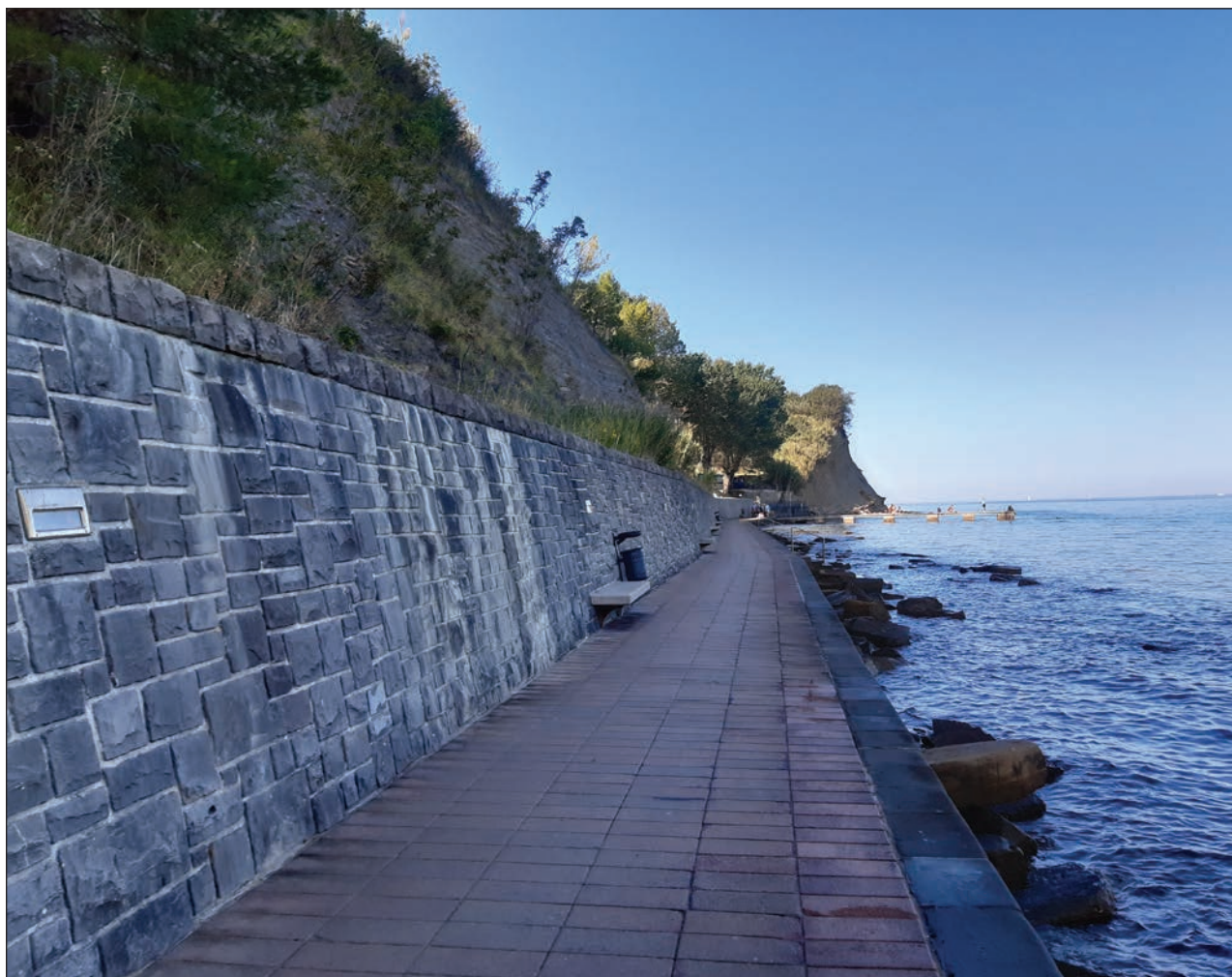


Figure 9: Bathing site Pod Belvederjem, Izola, the area usable for sunbathing is very narrow in some cases. Available GIS data were used for the calculation (Photo: Čok, 2023).

corridors of coastal shipping in many areas not intended for bathing.

The results presented will in future be of particular help to municipalities, which are faced with specific tasks in the planning of spatial interventions in the coastal zone, imposed by the sectoral legislation and, in addition, by the MSP. They will contribute to the creation of the assessment of the carrying capacity of the sea and the coast (in preparation), to the preparation of municipal detailed spatial planning acts for the future coastal zone management (MSP, 2021), to the preparation of more appropriate records and monitoring in the bathing areas and sites and as a supplement to the records for existing operators (concessionaires). The results will also be useful for all other institutions dealing with this issues (ARSO, etc.). In addition to their importance in terms of establishing records, we also see their role in the preparation of new local strategies for the

development of tourist infrastructure. Namely, all four coastal municipalities are planning to increase their accommodation capacity over the next decade. The data presented can be used as a reference point or as a guide in the planning of the points of interest in the area, as generators of coastal tourist migration (Andrade, 2022).

CONCLUSIONS

The Slovenian coast offers favourable conditions for bathing activities. In this sense, a number of natural bathing sites have been created in the area, both in the locations designated for this purpose and in other locations where the space or the absence of other land uses allow for sunbathing and bathing activities. Various institutions maintain records of spatial conditions, but in many cases their data are incomplete or not updated.

In our research, we found that the total number of all natural bathing areas and sites in the Slovenian coastal strip is 46. Of these, 17 are located in the area of bathing waters and have a water permit. These bathing locations are listed in official records. They have a total area of 174,883 m² and a capacity of 22,609 bathers. In addition, there are 29 bathing areas and sites in locations that are not primarily intended for bathing (although some of them are located in bathing water areas) and are classified as informal bathing sites or areas. They have a total area of 174,883 m² and a capacity of 20,235 bathers.

The total capacity of all considered, i.e. formal and informal bathing areas and sites, is thus 42,781 bathers. This estimate is almost three times higher than the official records (ARSO) which indicate a capacity of 14,400 bathers. Based on the above, we can conclude that there is a real need to establish a more efficient approach to spatial recording than the existing one.

Of course, the issue described must be considered in the context of changing social values. Spatial capacity is certainly an important element of spatial planning and management, but the greater challenge in this process is the behaviour of users, their expectations and demands. The increase in green tourism and general environmental awareness are driving the trend towards the preservation of natural bathing sites, while at the same time the need of visitors for support services is accelerating the establishment of support infrastructures virtually everywhere. Lastly, natural bathing sites are open public spaces in an area with very high physical and environmental constraints, where many other interests in the use of the sea and the coast are also present.

Although the given figures on the extent and capacity are generalised, they clearly indicate the need for a more precise and careful approach to the future management of this sensitive coastal area.

FORMALNA IN NEFORMALNA NARAVNA KOPALIŠČA IN PLAŽE V SLOVENSKEM OBALNEM PASU – IZZIVI NA PODROČJU EVIDENTIRANJA IN NAČRTOVANJA

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POVZETEK

Slovenska obala ponuja ugodne pogoje za dejavnosti kopanja in sončenja, zato so se v prostoru izoblikovala številna naravna kopališča in plaže. V članku so predstavljeni rezultati raziskave, ki je bila usmerjena v evidenco njihovega pravnega statusa, števila, obsega in kapacitet. V tem okviru smo izvedli pregled uradnih evidenc, analizo stanja v prostoru, konzultacije z lokalnimi skupnostmi ter upravljavci kopališč. Uporabljeni sta bili deskriptivna in primerjalna raziskovalna metoda. Na podlagi pridobljenih podatkov smo izvedli izračun obsega in kapacitet vseh kopališč. Ugotovili smo, da podatke o kopališčih vodijo institucije tako na državni kot lokalni ravni. Žal so obstoječe evidence nepopolne, težavo predstavlja tudi večkrat nedorečen pravni status (formalna in neformalna kopališča) in neusklajena terminologija (kopališča, plaže, kopalna območja ipd.). Glede števila in prostorske razporeditve smo ugotovili, da se poleg 17 kopališč, kot jih vodijo uradne evidence, v prostoru nahaja še dodatnih 29 lokacij, kjer se tudi izvajajo dejavnosti kopanja in sončenja. Dodaten izziv predstavlja evidentno neskladje med formalno opredeljenimi kopalnimi vodami (vodna zemljišča, ki se razprostirajo po tretjini obalne linije) in kopališči na kopnem. Z izračunom obsega (zemljišča na kopnem v m²) in kapacitet (7 m²/kopalca kot minimum) smo ugotovili, da vseh 46 kopališč skupaj omogoča nastanitev 42.781 kopalcev. Ta ocena skoraj trikrat presega uradne podatke, kar naslavlja potrebo po nadgradnji obstoječega sistema evidentiranja stanja v prostoru. Predstavljeni rezultati bodo v podporo zlasti institucijam, ki jim nedavno sprejeti Pomorski prostorski plan Slovenije nalaga pristojnosti in naloge za načrtovanje posegov v obalnem pasu. Sem sodi predvsem izdelava ocene nosilne zmogljivosti prostora in posledično usklajeno izvajanje strategije prostorskega razvoja v občutljivem morskem okolju.

Ključne besede: obalni pas, naravna kopališča, plaže, kapacitete, ocena nosilne zmogljivosti kopališča, evidentiranje

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received: 2023-10-12

DOI 10.19233/ASHS.2024.31

TRAVEL WRITING AS AN INSTRUMENT OF CULTURAL HERITAGE PROMOTION

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ABSTRACT

This study contributes to the research literature through its approach to equipping tourism content creatives who are entering the professions of destination image communication with platform expertise alongside cooperation and co-creation leadership. Productive skills for travel writers and social media content producers in tourism are significant in the co-creation of sustainable tourist experiences since they are interactive and participative. The two purposes of this study are to implement and improve the dialogue journaling process as a re-usable methodology. The new 3-step processual research methodology is explained through a case study with stakeholders and project leaders in Brežice, Slovenia. The paper contributes to pragmatic tourism management concerns and practice by reporting findings from a real-world process project on cultural heritage that provides a re-usable solution.

Keywords: tourism development, stakeholder engagement, dialogue journaling, cooperation and co-creation, cultural heritage promotion, travel writing

LA SCRITTURA DI VIAGGIO COME STRUMENTO DI PROMOZIONE DEL PATRIMONIO CULTURALE

SINTESI

Questo studio contribuisce alla letteratura scientifica attraverso il suo approccio nel fornire competenze sulla piattaforma ai creativi dei contenuti turistici che si stanno avvicinando alle professioni della comunicazione dell'immagine di destinazione, affiancato dalla cooperazione e dalla leadership nella co-creazione. Le competenze produttive per gli scrittori di viaggio e i produttori di contenuti sui social media nel settore turistico sono significative nella co-creazione di esperienze turistiche sostenibili poiché sono interattive e partecipative. I due obiettivi di questo studio sono implementare e migliorare il processo di journaling dialogico come metodologia riutilizzabile. La nuova metodologia di ricerca processuale a 3 fasi è spiegata attraverso uno studio di caso con gli stakeholder e i leader di progetto a Brežice, Slovenia. La ricerca contribuisce alle questioni e alla pratica della gestione pragmatica del turismo riportando i risultati di un progetto di processo del mondo reale sul patrimonio culturale che fornisce una soluzione riutilizzabile.

Parole chiave: sviluppo turistico, gestione stakeholder dialogue journaling, co-creazione, promozione del patrimonio culturale, scrittura di viaggio

INTRODUCTION¹

Every geographical location, whether it be an urban area, a designated tourism site, or a destination, constitutes a complex system that demands thorough comprehension, strategic branding, and effective management strategies. It is significant to emphasise that each such place possesses unique attributes shaped by its geographic coordinates, cultural identity, and historical background, all of which should be taken into account when considering and designing destination marketing strategies and planning tourism products. Laznibat and Obad Šćitaroci (2023, 32) point out the role of heritage as a “developmental resource”. Travel writing can be employed as a tool for branding and promotion of cultural heritage. This work proposes that the practice of travel writing can be remodelled into a research inquiry process which can then be employed by content authors to create value both for the texts they produce and for the destination/attraction places they describe in their texts. The work explains the design of this new model, which will be called the dialogue journaling model (Mansfield *et al.*, 2024), and explores its use in a short case study with creative professionals entering industry. The role of catalyst texts in cultural and particularly literary tourism, has been thoroughly explored over the last decade (Mansfield & Potočnik Topler, 2023a, b; Mansfield, 2015; Thompson, 2011; Venkovits, 2010/2011) whilst the emergence of digital content marketing and the freelance job market has now turned travel writing into a realistic career path for recent graduates around Europe who understand content marketing within the travel industry (Mathew & Soliman, 2021). Travel texts have also been used in teaching tourism management for the last two decades (Mansfield *et al.*, 2024; Mansfield & Potočnik Topler, 2023a, b; Armstrong, 2004) and in creative placemaking (Mansfield & Potočnik Topler, 2023a, b; Rapanta *et al.*, 2021). The quality of public spaces determines not only the quality of living in the city (Solarek & Grochowska, 2021) but also influences the tourism experience. Identity of place “represents the key characteristics with which a particular place (region, village, town, neighbourhood, public place, etc.) is associated” (Verovšek *et al.*, 2016, 575). Research postgraduates in tourism management are aware of that, but lack preparation for their fieldwork. New methodologies in travel research using narrative non-fiction remain underdeveloped and are not reviewed in the academic journals. Tribe (2002) points out that the notion of reflection is essential. Authors of this article

argue that this is where teaching, practicing, and researching dialogue journaling has the potential to become an answer. By employing travel writing, the concept of transformation and degrees of change (Tribe & Paddison, 2021; Hayes & Tucker, 2022) in tourism could be further developed and bring actual changes at different levels. Also in terms of sustainability and achieving Sustainable Development Goals (SDGs) that remains a challenge (Arbeiter & Bučar, 2022). This paper, thus, sets out a model for researchers who would like to use literary travel writing as a valid research methodology for an innovative type of place and cultural heritage inquiry that includes stakeholders and produces output that is accessible to a larger public, the locals and to policy-makers. Also with the goal to build sustainable places by inclusion of communities (Alonso & Nyanjom, 2017; Hwang & Stewart, 2017; Iazzi *et al.*, 2020; Huy, 2021; Amoako *et al.*, 2022), where it is imperative to recognize the presence of diverse stakeholders within these destinations and actively solicit their collaboration (Mansfield *et al.*, 2024). The primary objective of the authors is to foster innovation, facilitate stakeholder engagement, and promote the utilization of proposed educational methodologies within the fields of tourism and management studies.

MATERIAL AND METHODS

Research Design and Conceptual Framework

Case Method (CM) is an educational and empowering active learning tool widely used, which immerses learners or trainees as protagonists into a real case scenario to elevate their thinking abilities, enhance their understanding of particular complex issues; develop their problem-solving skills to be able to make critical and informed decisions, acquire managerial skills, develop some ethical values, take ownership of their learning, build on their confidence (Kunselman & Johnson, 2004; Puri, 2022), and work as part of a team (Hassall *et al.*, 1998). Equally important, Banning (2003) explains that CM can improve learners’ tolerance for ambiguity (ambiguous environment), and as a result, question assumptions (Hassall *et al.*, 1998).

Preparing a learning organisation to be involved in a case involves 4 steps (Puri, 2022): 1) Framing (identifying the research questions); 2) Labelling (identifying the potential roots and consequences); 3) Synthesising (findings emerging from participation); and finally, 4) Concluding (suggestion of strategies to be adopted). Torres-Harding *et al.* (2018) have

¹ The authors would like to thank the CEO of the Posavje Museum Brežice (Posavski muzej Brežice) Alenka Černelič Krošelj for contributing numbers of the events and visitors of the Museum in Brežice.

explained that the involvement of stakeholders in a case, triggered a variety of emotions (Puri, 2022). First, enthusiasm and excitement (as they were involved in the planning and delivering of the campaign, they found the experience rewarding from a learning point of view), development of sense of community (learners not only were proud to join their community for a common fight, but they also feel they have to contribute positively to that community, and be agents of change); and finally, accomplishment and empowerment (learners found it particularly rewarding to be part of a movement working positive change in the society, and people's lives). Emotional involvement is a specific type of engagement that is required for the production of literary, that is, emotional, writing since this type of writing invites experience co-creation through identification with the narrator of the literary travel text.

Research questions and hypothesis

Hypothesis: Conceiving of travel writing in process projects using the proposed model of journaling has the potential to be a community empowerment tool that maintains an ethical approach to cultural heritage.

Research Questions

- R1: How can this model for travel writing projects contribute to cultural heritage awareness?
- R2: How can responsible behaviour be encouraged by employing dialogue journaling as a process in travel writing?
- R3: How can employment of processual and literary travel writing further encourage sustainable destination branding?
- R4: How to monitor the process of collaborative co-creation in exploring heritage?

This study examines a new approach to equipping those entering the professions of heritage tourism, heritage interpretation and destination image communication with these emerging technology and creative skills. The purpose of the proposed methods is to help professionals build portfolios of resources through managing elicited knowledge in a way that is comprehensible to heritage institutions, including museums and destination attractions, and to ascertain the value of this type of preparation for industry as the key is in connecting stakeholders of the destinations (Saito & Ruhanen, 2017).

Originality of the Study

A key feature of the originality of this study is its approach to data collection. Expectations of the structure, scope and type of data are usually constrained

by the methodological design in tourism research. However, in this processual approach, when a dialogue question is formulated and posed, the responses of the correspondent are treated as data. The ongoing results are an unpredictable but rich resource from which to start the analysis. In dialogue, too, the incoming data are processed live, that is, synchronously, during the research and affect the subsequent questioning, often emotionally by developing the sensibilities of the respondents. The aim of this methodology is to make the research more agile, and, thus, for it to self-tune by adapting to the concerns of the tourism spaces under investigation. It can in this way uncover the deeper issues of value and experience in cultural and heritage tourism which are only accessible through the building of trust and sharing of voices, as explained in the section on Bakhtin's heteroglossia below. The most important difference between the scientific method of a partly structured interview and the dialogue is that a scientific interview typically involves one person, usually a researcher, asking questions to another person, often another researcher, an expert or someone with specialized knowledge, in order to gather information, insights, or opinions on a specific topic. The questions are typically structured and focused on obtaining specific information relevant to the interviewer's research objectives or the topic being discussed. The interviewer may also follow up with additional questions to clarify responses or delve deeper into certain areas of interest, while on the other hand, a dialogue is a more open and informal exchange between two or more participants where ideas, perspectives, and opinions are shared freely.

While participating in dialogues that enable the production of literary texts, the so-called literary artefacts, the writers and stakeholders become more aware of listening skills as the key to new knowledge and a successful continuation of the dialogue process (Wegerif, 2006). In his philosophy of dialogue, Buber (1958) argues that "a real conversation is one that is not preconceived and that develops spontaneously, in which an individual speaks directly to his or her partner and is able to respond to the unpredictable response of the other" (Gordon, 2011, 208). Buber (1878–1965) also discusses the significance of the "I-You relation" and emphasizes the role of listening skills in the dialogical approach (Gordon, 2011, 208). When cooperating with tourism stakeholders, high-quality dialogue is driven by the platform keeping the exchanges on display and archived. If moderators of dialogues do not know how to listen and animate the dialogue, then quality dialogue cannot exist. Consequently, the data from the dialogue are incomplete, which leads to weak results.

Regarding interpretation, storytelling is vital as stories enable explanation (Moezzi *et al.*, 2017) embedded within a compelling narrative.

Products, services and destinations have been branded through narrative knowing since it was established that storytelling has the ability to create emotional connections between a tourism product, a tourism destination and its target groups (Keskin et al., 2016, Ilić et al., 2021). Stories even have the potential to help solve complex challenges and facilitate cooperation (Mourik et al., 2021). Moreover, stories that are characterised by high informational density (Bassano et al., 2019) contribute to the distinctiveness of a destination and consequently increase the place value of the destination (Ganassali & Matysiewicz, 2021). This is fundamental, because stakeholders who are reliant on selling ground product or on receiving income from tourists and visitors depend on visitors' engagement through the stories to the products (Mossberg, 2007). Closely related to stories and travel writing is language (languages of travel writers, narrators, stakeholders, language of a destination etc.) and "linguistic landscape" (Mikolič Južnič & Pisanski Peterlin, 2023, 348). When applying storytelling in tourism, it has been discovered that:

the storytelling concept requires communication between different stakeholders: tourism policy makers, destination organisations and service providers. It includes tourism organisations, public administration at local and regional levels, private partners, different types of service providers (hotels, restaurants, museums and specialised visitor shops) and storytellers (individuals). (Vitić-Četković et al., 2020, 93)

Thus, successful and efficient storytelling can be a valuable tool for policymakers (Mourik et al., 2021) because it includes expert knowledge in an accessible narrative form from many fields. Tourism creatives therefore need to learn how to create, elicit and store narrative knowledge in their outputs.

Industry Process Models for Co-Creation

Industry does have an approach to incremental design of deliverables, the Dynamic System Development Method, DSDM (Hussein & Al-Janabi, 2019). Which, as those authors show, is well embedded in large travel companies who have software development needs. This Agile approach to creating new resources using DSDM focuses on visible, usable outputs from early in the project. Stakeholders representing the users are able to see, use and provide feedback on these deliverables early enough in the development process for two key functions: (i) improvement of the quality and

suitability of the deliverable, and (ii) trust-building between developer and client. An additional by-product is the creation of innovative solutions that were not apparent at the outset. These features of DSDM have been incorporated into the processual methodology for this research. It is worth bearing in mind that DSDM includes the role of a facilitator who maintains momentum in the discussion sessions; it is valuable to consider duplicating this role in Dialogue Journaling.

The Unknown town syndrome, Respondents and Data Collection

Smaller towns are often unknown to potential tourists, providing the DMO and the attractions in that town with a communication barrier. The case study town of Brežice (Slovenia) is an excellent example of this for English-speaking tourists from Britain and the US. In Slovenia, tourism revenue accounts for around 13% of GDP. As a destination that brands itself under the slogan I feel SLOVEnia. Slovenia's DMO content campaigns follow new trends, which include storytelling, digitalisation, new technologies, evolving visitor demand, and sustainable tourism growth, since these are considered the mega trends that will influence the future of tourism (Ianioglo & Rissanen, 2020; Carlisle et al., 2021). The Adriatic coastal resorts of Slovenia are well-marketed and have a long history of exposure. However, the inland towns, for example, Brežice, are in that unknown town category for that US and UK demographic. In such towns heritage, culture and cultural events are of great importance (Potočnik Topler, 2021). This so-called unknown town syndrome was revealed through taking a snapshot of backlinks to the website of the key tourist attraction in the town.

The pilot study created a secure intranet platform using Microsoft Teams with a linked PLC-type Microsoft OneNote notebook for a group of 5 professionals in Slovenia entering their careers in the tourism industry (2 male, 3 female; aged 23–27 years). MS OneNote's PLC, nowadays widely used in commercial operations, can be used not only as a digital environment, but also to create a professional learning community. 4,395 companies were using MS OneNote as a data management tool in 2023; over half of these were companies of 1,000 to 10,000+ employees (Lyon, 2023). On this platform, training was delivered from February to May 2023 in dialogue journaling (Mansfield, 2022), and in using personal experience to write heritage interpretation texts (Mansfield & Potočnik Topler, 2023a, 67–70). As a stakeholder responsible for cultural heritage in the Brežice Municipality, the Posavje Museum in Brežice (Posavski Muzej Brežice) took part in the

research. Dialogue with the museum was established in February 2023 and is still ongoing.

A group of stakeholders in cultural heritage in Brežice was identified with whom dialogue could be established to explore the value of the texts created by the trainees, and to elicit tacit knowledge on the types of interpretation that experienced heritage professionals considered of value to their institutions and to their public audience. The sample of case participants was selected in the following way: 1. Trainees in the tourism industry who had little or no experience of using Microsoft OneNote to work as a team in dialogue. 2. Respondents with no experience of the dialogue journaling process, so that any changes in working practice and identity could be better correlated with their use of the process and platform technology. 3. Local tourism and heritage stakeholders (Mansfield *et al.*, 2024). These locals included the museum CEO, the local DMO, the staff of local restaurants and cafes, and locals who were likely to engage with the research and provide data from semi-structured interviews after the development phase.

The Chief Executive Officer (CEO) of the museum in the town of Brežice proved to be the most responsive to dialogue and also provided traditional visitor data. The case study therefore focuses on this respondent for that reason and also because the museum's collection of cultural artefacts began to emerge as catalysts for the writers as they explored relationships between the food culture of the tourist town and the heritage artefacts. It became clear that the role of a visitor as co-creator of experiences is significant (Antón *et al.*, 2018), and that this agile shifting of the data collection is a positive attribute of dialogue journaling as a method of inquiry. Which data to collect and which cultural practices to document emerge after the start of the research inquiry; this is innovative but difficult to account for in traditional travel research.

Before the study, in early February 2023, in order to generate richer coding for the concept of value in written texts and interpretation media, a pilot question was posed in social media groups to elicit what commercial writers in heritage, culture and travel consider as value in their writing. This gave insight for the research design. Writers' responses to simple dialogue questions concerning value were collected through Twitter (10). Gerund-coding and memo-writing following the methodology proposed by Charmaz (2006) were applied. The research revealed surprising results. Rather than bloggers and writers considering earnings and web-page views as a measure of value the following three fundamental concepts of value emerged:

- (i). Creation of author's identity through recording personal experiences in written form in the public sphere.
- (ii). Demonstration of leadership by the heritage writer by their Invention of cultural tourism activities.
- (iii). The widening of connections with a reading public and with stakeholders by the writer.

The results, especially, from (i) above, were integrated into the first training activity with the new entrants to the profession in February 2023, using training from methods manuals.

The purpose of this research is concerned with the validity and performance of the Dialogic Journaling Process methodology in tourism development, both of tourism product in the heritage sector and in portfolio development in the professional entering the industry.

A dialogue of analysis was initiated with the CEO of the town's museum and elicited initially the museum's seasonal fluctuations in categories of visitor. This was just an initial step in beginning to document the complexity of entanglements that alter, adjust and shift tourism consumption practices. This field, which is more recently being theorised as posthumanist, where more-than-human entanglements with the environment create opportunities for the co-creation of positive experiences (Baugh, 2022), encourages researchers to see beyond the economic imperatives of business to instead seek out opportunities in cultural tourism where visitors can enjoy feelings of accomplishment (Baugh, 2022).

TRAVEL WRITING

Several branches of travel writing have developed as disciplines with their own methodologies for research, for example, anthropology, human geography, history and more recently auto-ethnography (Mansfield *et al.*, 2024). The academic study of travel writing by practice is a more recent phenomenon. In previous decades, research has been oriented towards historic travel literature (Phillips, 2016; Vanek, 2015) to explore the original authors' own hegemonies encoded in their texts (de Pont, 2014). For the reading public, the consumption of travel writing is an enjoyable leisure activity and a way of becoming acquainted with distant destinations through identification with a strong narrator character. For travellers, travel writing is an opportunity to share their own experience from a journey and compare it to the homeland (Venkovits, 2010/2011). Venkovits (2010/2011) claims that travel texts provide new information on two levels, namely on one hand offering an insight into past walks of life not available elsewhere, or detailed descriptions of

traditions, customs, historical and cultural events. On the other hand, such texts include not only what the traveller sees but also how the culture, the society, previous knowledge and preconceptions of the visited place shape the journey and the perceptions of the traveller (Mansfield *et al.*, 2024).

Based on their research and the teaching of travel writing at tourism and business schools across Europe, Mansfield and Potočnik Topler (2023a, b) introduced some travel writing methodologies and the Dialogue Journaling Process Model (Table 1). Nevertheless, they wanted to further explain and facilitate certain processes, approaches, and questions to enhance the planning of research and practical tasks. Therefore, this article aims to introduce advances in the methodology of dialogue as research. As early as in 2007, anthropologist, Paul Rabinow called for more effective methodologies for interrogating culture when he revisited his work on Morocco:

where a successful cultural form provides an ongoing framework for interpreting and generating experience, here the experience of the other is most comprehensible. [...] Yet it is in the less explicitly shaped and less overtly significant areas of day-to-day activity and common-sense reasoning that most cultural differences are embedded. Thematic observation is disturbingly difficult, for these phenomena are everywhere, thereby proving the most opaque to the methodologies we have developed. (Rabinow, 2007, 58)

It is with a return to ethnographic approaches within travel writing and a more overt awareness of the interplay between emic and etic perspectives that this new model is set out. A more subtle proposal of the researcher's positionality can be embedded in the character of the first-person narrator (Kotash, 2010), and thus take the readers of the research output into an emic position themselves as they identify with the character in this new, and effective methodology.

This research makes advances in the methodology of dialogue as research, where "each discovery of a piece of evidence helps the participants to see what additional evidence might be necessary or what additional questions might need to be explored" (MacInnis & Portelli, 2002, 35) by incorporating the ongoing journaling in a permanent Web 2.0 archive to track the processual nature of these catalyst moments between researcher and stakeholder. As well as advancing the methodology by the addition of archiving like this, the process also provides interim deliverables to commissioning stakeholders as part of the trust-building. This approach is proposed here as the Dialogic Journaling Process Model.

TRAVEL WRITING: WHAT IS IT, WHAT IS ITS ROLE IN TOURISM, ANY GAPS RELATED TO ITS APPLICATIONS?

Travel writing has been a popular genre for centuries (Thompson, 2011) since it plays a valuable role in helping individuals explore the world and fostering a deeper appreciation of the places they visit. It combines elements of personal narrative, cultural exploration, and subjective account about the destinations visited. Travel writers, thus, aim to convey the sense of a place, its people, culture, literature, art, history, and landscapes through their writing. Robinson (2004, 303) describes it as "writing about the experience of travel and visits to 'other' places", but, in fact, research by Culbert (2018), Mathew and Soliman (2021), Mansfield and Potočnik Topler (2023a, b) and others show that travel writing has many potential functions. In the tourism industry, it has the potential to enrich tourism experiences by offering potential travellers information and inspiration, promoting different, authentic or innovative experiences and cultural exchange, additionally contributing to the preservation of destinations, stimulating economic growth, and adding to the destinations and societies, especially by including locals' knowledge, stories and views (Mansfield & Potočnik Topler, 2023a). This article posits that travel writing stands as a valuable instrument for facilitating the engagement of stakeholders and for formulating environmental appeals across diverse textual formats within the tourism industry. The local people, in fact, have become one of the most important stakeholders in heritage protection and management (Fakin Bajec, 2020) and travel writing enables also engaging into dialogues with them and creative co-creation (Melis *et al.*, 2023).

In the frame of international research and teaching consortium between the University of Maribor (leading partner), Dialogue HE Consultancy, Oxford Brookes University and the University of Bergamo, travel writing has been used for encouraging and teaching writing skills, research steps, connecting stakeholders, encouraging dialogue and creativity. The additional value of travel writing in tourism is multifaceted and it has been established that it can benefit both travellers and the tourism industry at least in the following ways: for providing information, inspiration, recommendation and review, for experience design, for engaging in dialogues with the locals, for encouraging activism, for destination branding, for identity development and for contributing to the cultural heritage of a society by producing travel writing texts (Mansfield & Potočnik Topler, 2023a).

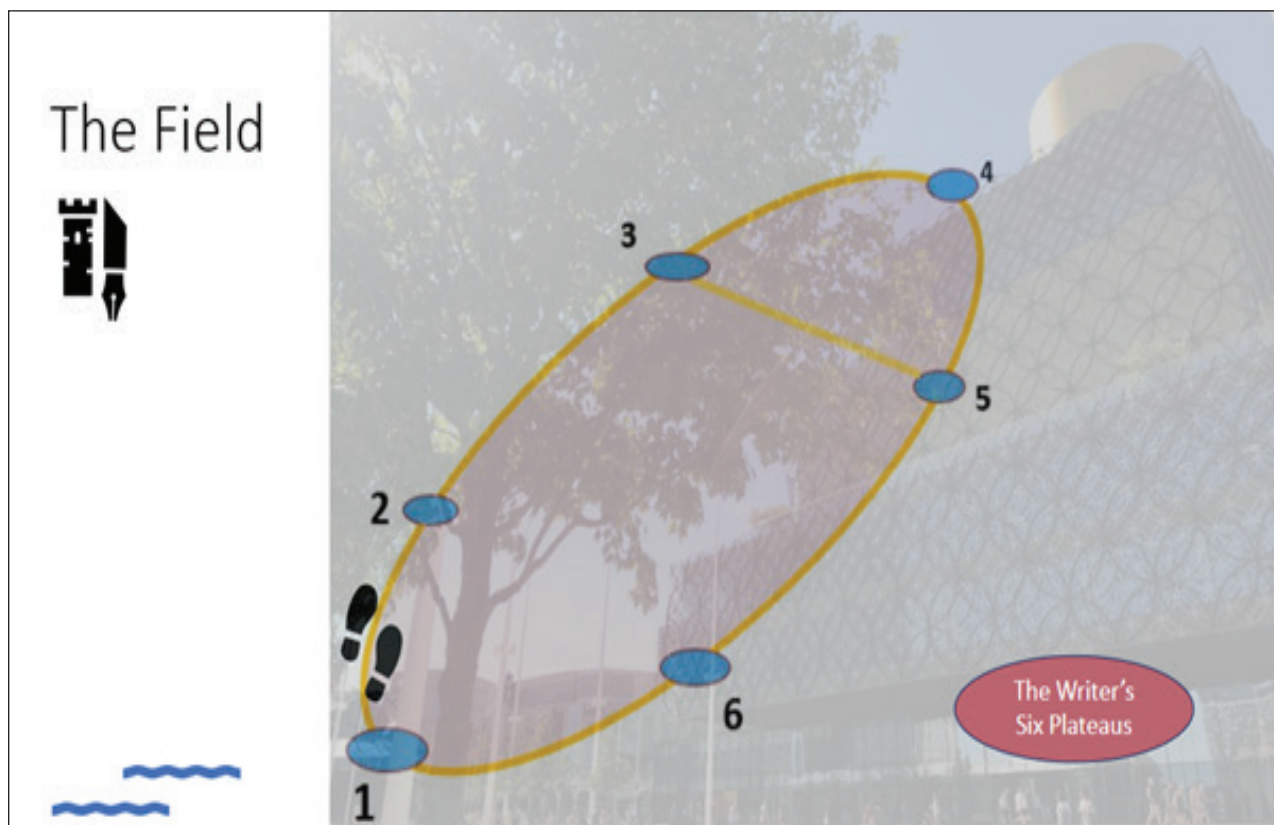


Figure 1: *Writer's Plateaus* (Source: Mansfield & Potočnik Topler, 2023b, slide 12).

Description of the Travel Writing Process

Potočnik Topler and Mansfield (2023a) propose a 3-step process:

1. The Library Step
2. The Field Step
3. The Lab Step

Table 1 shows a detailed list of possible activities, resources and outputs in each step. For our classroom and fieldwork Potočnik Topler and Mansfield designed a template in Microsoft OneNote for learners to use while writing travel writing notes and texts – during the so-called journaling. As the writer returns with care to the pages, they become a working archive. Further on, by sharing the Notebook with peers, lecturer and eventually stakeholders dialogue can generate trust and shared knowledge.

Route-Planning during the Step 1 - Library Step as Field Preparation is vital. Google Maps or other online mapping systems are useful when planning a walking route for writing at the destination. For a destination town, authors are advised to pick a point of entry like the railway station or the hotel, then plan 5 more stops along an elliptical route to bring the writer back to the start or the so-called first plateau.

Mansfield and Potočnik Topler (2023b) call these points the writer's plateaus (Figure 1). Google Maps also provides information on how hotels, restaurants and visitor attractions have interacted with the tourists who have reviewed their facilities. For a travel writing project on Brežice, for example, we saw that the Pr'Šefu Restaurant with Rooms, Prešernova cesta was perfectly positioned for a walking route that turned from the Sava bank into the old part of town.

As early as in Step 2 (The Field Step) the content author can begin to make social media posts on a channel where short texts are expected. For example, by posting about sights seen out in the destination. During the final step, 'Step 3', the content author crafts more structured stories. These are for longer blog posts, LinkedIn articles or for an article in a print magazine.

Journaling can be as simple as taking notes from a book in the library (Step 1) and then returning to these initial notes later to carefully add your own thinking. The Note Containers (Figure 2) encourage you to take notes when you can, then return to spend time later to combine and create ideas from very different sources. The width of our note containers means that you can open your journaling on your mobile phone to add ideas later, on the move.

Table 1: The Dialogue Journaling Process Model (Source: Mansfield & Potočnik Topler, 2023a, 96).

Name of Step	Source Documents	Dialogue with	Outputs
1 Deep-mapping and Route Design. The Library Step	Maps, novels, diaries, biographies, reports on land use change, scientific articles	Locals, stakeholders, academic researchers, for example, geographers, tourism and heritage specialists	Journaling. Sketch maps of planned routes for walks. Trust-building correspondence.
2 Fieldwork. The Field Step.	Menus, leaflets, posters, local newspaper, receipts, and the live environment of the field experience	If possible, synchronous dialogue with remote colleague or mentor, preferably on this platform to keep archive. Interviews on the spot.	Field notes. Theme, sub-theme and twill elements for travel story. Blogging and Social Media posts.
3 Recounting the travel story. The Lab Step.	Own field notes. Additional desk research to complete details and fact checking.	An author-editor if available to read drafts. Blogging extracts for feedback from trusted stakeholders.	Finished travel story for publication in various formats or for digital delivery to commissioning stakeholder.

Table 2 shows a list of the key storytelling components that can be included in writings on destinations for social media campaigns. These storytelling components have the ability to engage writer's audience with writer's content.

It is advised to choose just one component to work with, from that list of storytelling components in Table 2.

How to make the I-narrator relate to cultural heritage? This is how one of the course participants started her writing (this text was one of the best and was published at the beginning of 2024): "Already from afar, after the highway exit for Krško from the direction of Ljubljana, I notice the silhouette of Brežice, highlighted by the Water Tower and the bell tower of the Church of St. Lovrenc, which I read about before the trip [...]" (Leben, 2024).

When the writers are out in the field, they are advised to use all their senses to deliberately experience the places on their route of plateaus. Course participants were given the following advice: Touch the stone of buildings to activate senses other than simply looking. Focus on how gravity affects your legs, or cobbles make walking more apparent. When you are with others, ask them what they really like about this spot; their dialogue will often surprise you because they have experienced a different aspect of the place.

For posting on social media channels, online dialogues with stakeholders from the destination provide journaling opportunities. The journaling lets authors build up assets of short texts and images for the social media posts before the actual travel.

When the authors are nearing the end of Step 2, and have completed journaling out in the field, it is time to plan the strategy on a pair of social media channels. This is where the authors will recount their story to a wider public audience. It is suggested to choosing one of the following two pairings of channels: Instagram and LinkedIn, or Facebook and Google Blogger. A pairing like this will provide authors with viewer metrics to measure the impact of their campaign.

Step 3 In the Lab, within the journaling process notebook (Figure 2) is intended for writing and refining the posts, each in their own OneNote page, and store the image asset with them for reference.

Those who do not have access to technology or are hesitant towards it can write in notebooks. Writing in a notebook is one of the options; it should be noted, though, that additional time is required to transcribe the text into the desired medium.

Establishing the dialogue journaling model

The Dialogue Journaling Process Model improves the productivity and performance of content creatives. The

model, as a working method in commercial practice, ensures the necessary productivity to deliver required word counts and to meet deadlines. Whilst, through dialogue around the delivery of interim output texts, the writer's performance is improved. Performance in literary non-fiction texts is an amalgam of quality, emotional affect, narrator identification, and inclusion of stakeholder requirements and voices.

RESULTS AND DISCUSSION

The objective of this article is to propose an industry-compatible process method for travel writers, which contributes to cultural heritage awareness. More specifically, a dialogue-journaling method is analysed and proposed.

Contributions to Knowledge

One of the contributions to knowledge made by this work is the themes which emerged from coding the creatives' travel journaling contributions. Two broad categories of content type could be identified from the data. These two were classified as (i) Literary content and (ii) Existing tourism product description, within each of these, new sets of 5 themes are proposed. This total of 10 themes provides a starting point for any further research in literary travel writing, and firmly establishes a base from which value in travel texts can be identified and improved for the writer and their commissioning organisation.

The second substantial contribution came from the dialogue with the museum stakeholder as the process moved into Step 3. These contributions to value in the travel text and in the process can be summarised as follows:

(1) True dialogue emerged where the specialist and highly-engaged trust partner responded to the near-final literary travel writing paragraphs of 4 stanzas. This meant that heteroglossia could be added to the final copy for storage as a travel story on the tourism platform. High value explanations were elicited at this stage because the stakeholder needed to make the content creative understand and, at the same time, knew that an interested audience existed. Thus, the process had generated two motivating reasons to spend time on a careful and thorough response.

(2) Treating the stakeholder's contributions as data, offers the scientific researcher more material for analysis. The researcher can see what positions or statements in the near-final copy act as catalysts for dialogue of new value.

(3) Reciprocal value to the stakeholder. The museum has the opportunity to read an uncorrected, detailed story of the route and decisions taken by the writing creatives as they make their way through the museum. This was a unique opportunity to see the

Table 2: A list of the key storytelling components that can be included in writings on destinations for social media campaigns (Source: Potočnik Topler & Mansfield, 2024, 27–28).

	List of Key Storytelling Components
1.	Create an I-narrator and other characters.
2.	Give historical background to place or a cultural practice or artefact.
3.	Apply imagistic language. Simile and metaphor for affect.
4.	Use verbs to give movement by the narrator, a vehicle, or other agents in the scene.
5.	Build plot. Aristotle defines this as creating reasons, so ask why?
6.	Include dialogic voices. Write to include two or more voices that do not fully agree.
+	Past tenses – please see the section on pp.18-19 'The six past tenses in English narrative writing' in the book.
+	Twill – please see the section on pp.20-23 'Twill as research synthesis', in the book.

choices and personal cultural capital of anglophone British visitors, and how that cultural capital engaged with, or failed to engage with, experiences curated from the museum collection and put on display for the spring and summer season.

From the findings after analysing the texts using the framework method, it emerged that two themes were rarely included by the travel writers: C-Deixis, and D-Senses. These unexpected diagnostics mean that any future training of travel writers should include examples from other writers of these literary devices. They could be presented in the spirit of dialogic education as questions asking writers to identify these features in short extracts by published authors. The nature of the two missing themes, though, also suggests that more field experience would help the writers to accumulate sensory and phenomenological experience.

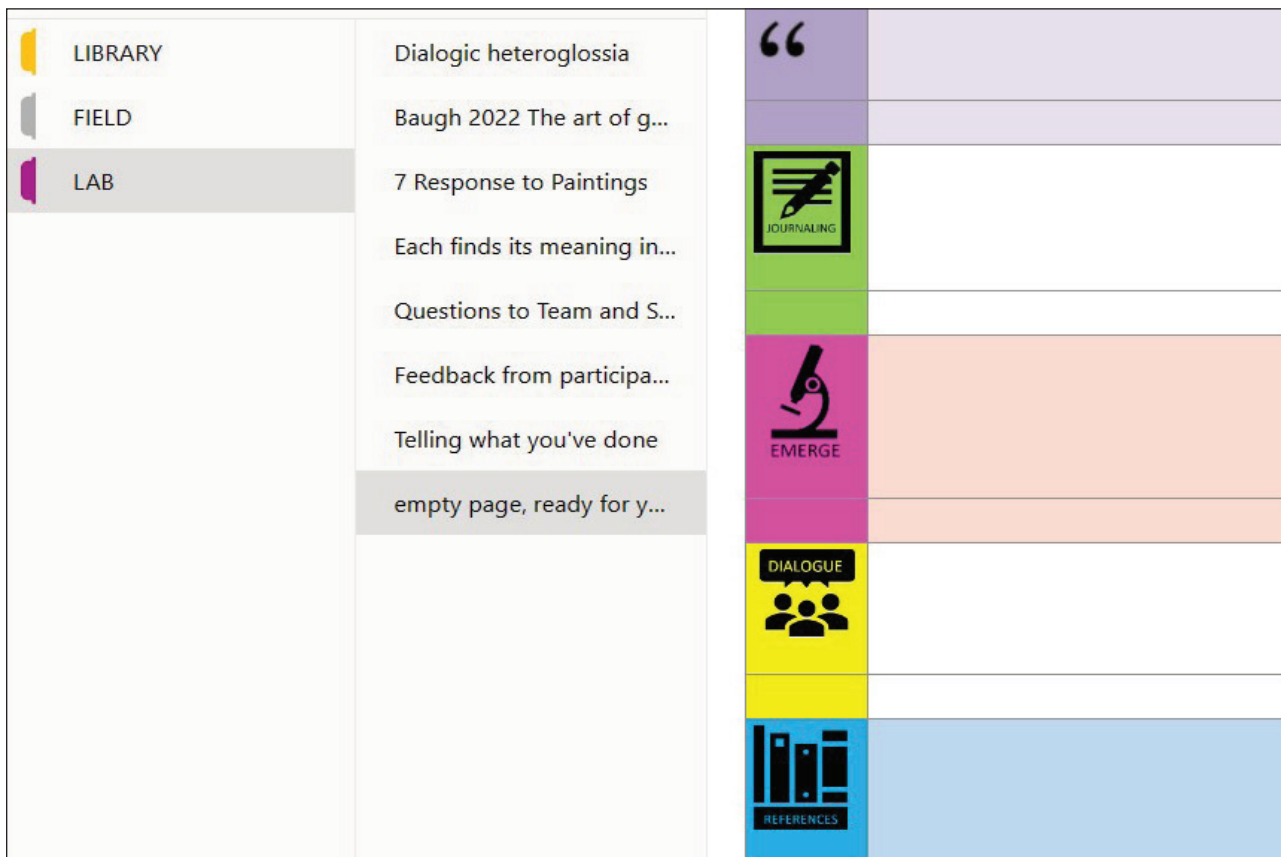


Figure 2: Journaling Process Notebook in OneNote (Source: Potočnik Topler & Mansfield).

Surprisingly rich dialogue occurred as the work moved to Step 3 of the writing process, when the museum stakeholder had the opportunity to read and engage with blog-style travel pieces. If this new knowledge elicited late in the process from stakeholders can be incorporated into the final stored travel text as an additional voice speaking of the experience of the artefacts, then a more Bakhtinian polyvocal text can be held as the final literary artefact from these projects.

Findings from the dialogue with tourism stakeholders

The chosen case study museum, the Posavje Museum in Brežice (Posavski Muzej Brežice), Slovenia, quickly responded to the trust-building overtures of the research team. They kindly, and readily responded to requests for what is quite sensitive data in a commercial environment. The statistics provide sufficient evidence to see a clear annual trend in ticket sales to visitors, see Chart 1. Of value to this work on dialogue journaling, too, is that the gatekeeper of these data, who was also the respondent in the dialogue saw the transactional nature of dialogue journaling and requested access to the

research team's results, and acknowledgement in any publication of synthesis of the research. This demonstrates the ethical exchange established as part of the overarching theory of dialogue journaling,

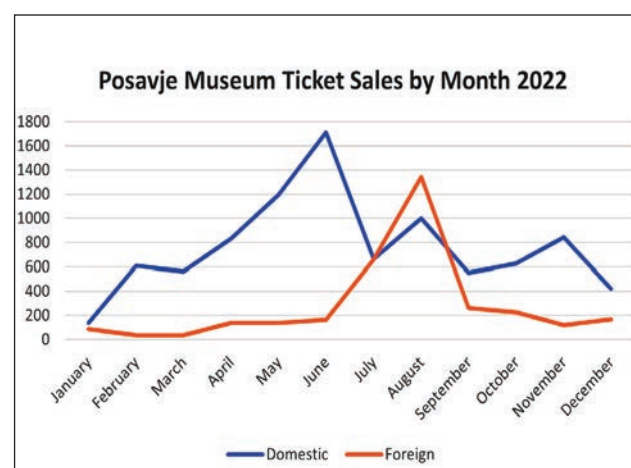


Chart 1: Comparison of domestic versus foreign ticket sales for the Posavje Museum by month during 2022 (Source: Potočnik Topler & Mansfield).

since it both gives voice to, and rewards respondent groups. The Dialogue Journaling Process Model, shown below in Methodology, lists this type of trust-building correspondence in the first or library step of the process.

Findings from this plotted comparison graph show a peak and a shoulder season that will be immediately familiar to many tourism professionals in Europe and in temperate zones in the northern hemisphere. Almost perfectly, the locals enjoy the museum in early summer, then leave for their holidaymaking away from Brežice whilst incoming foreign visitor numbers peak a little later, through July and especially in August. If these data are overlaid with tourist arrivals from outside Slovenia, that August peak shows the expected correlation (see overlay in Chart 2).

Posthumanist approaches, though, require tourism researchers to consider very many more entanglements than simply the climate and holiday-making traditions of western societies. One move in this direction has been the inclusion of ethno-botany in place-branding (Mansfield & Potočnik Topler, 2021), which considers, for example, when pollinators are seeking out flowering plants and how that can be incorporated in the co-creation of experiences for tourists to museum collections. Working within the framework of the processual methodology of dialogue journaling, initial data from these graphs can be taken into consideration by the research and development team to permit adjustments to the later steps in the process. This may be progressed by dialogue with stakeholders and the team while posing questions around the data. For example, what happens in October? What cultural artefacts are held in the museum collection that have a connection with October?

Findings from post-project feedback with the trainee professionals

Feedback was sought near the end of the main literary writing periods from the team of trainee creatives in tourism and heritage. While this feedback mostly demonstrated how the team acted as catalysts for one another in their creation of narrative interpretations of the museum's paintings it also found an echo in the theoretical writing of Baugh (2022): "the individual has enjoyed what Gilles Deleuze calls a 'good encounter' with its environment or with other human beings. In that way, joy helps guide us towards further good encounters, as well as increasing our self-confidence and energy, enabling us to think and act better" (Baugh, 2022, 63).

These positive encounters in the dialogue on the platform are exemplified by course participants' feedback (the focus group method was used to get students' feedback) during the close-out of the project: "[...] she reminded us of grandmother – that is when my brain started to work, and I remembered all the good things that happened in my childhood. I think that personal (subjective) writing is hard because from college to master's degree – we always had to think and write as objectively as we could – without our opinion, feelings [...]" (Course participant, 2023).

These good memories attach to the creative's experience during her travel writing and begin to accrete similar positive experiences in the team and in the final literary artefact that the project was aiming to create for tourism development. One of the students provided the following feedback:

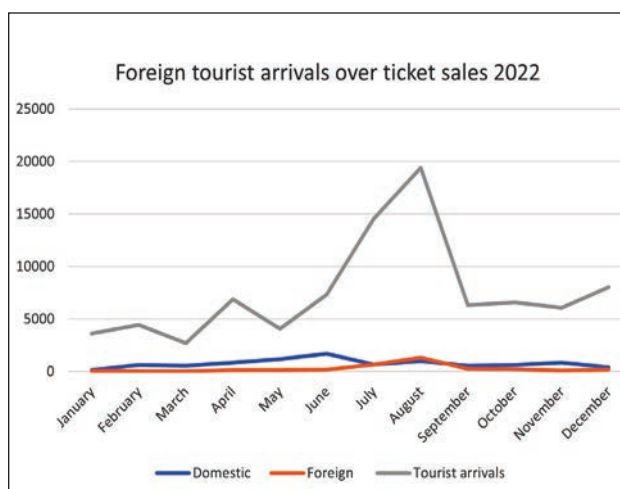


Chart 2: Foreign tourist arrivals over ticket sales 2022
(Source: Potočnik Topler & Mansfield).



Chart 3: Museum Website Visits During Project in 2023
(Source: Potočnik Topler & Mansfield).

Within the travel writing I just have to say that it helped me to look forward into tourism in the way that I didn't know this side of tourism existed, which gives you the opportunity to be creative and dream with words. It allows you to describe the places where you have been and what the experience was. In fact, the same place for different people will tell so many different stories, which makes the tourism world even more exciting. I really liked to see how I was improving on travel writing from the beginning of this academic year because from 1 thing I didn't even know, now I would like to know more, and when I read something about tourism, I also think if that is travel writing.

Another student emphasised the significance of travel writing knowledge in tourism:

This year I learned a lot about travel writing. I think, it is really important in tourism, especially because, with that kind of writing, we can express our feelings and emotions, when we are travelling. For people that read our travel writings is easier to feel how the writer felt in a certain place at a certain landmark or point. Because of that people have a desire to visit certain place. I like that kind of writing, where there is no scientific language. Our classes were interesting for me, because we had to think in a different way. I am proud of our writings, because in it, there is a part of us. And that part are our feelings and emotions that we felt at certain landmark in Brežice.

Training professionals in networked heritage writing

A Web 2.0 platform is a centralised repository which effectively maps the network of tourism actors while facilitating relationships through digital interaction and resource-sharing; In the network approach, a tourism destination is composed of nodes (the actors) and links (the relationships) (Pavlovich, 2014; Sainaghi & Baggio, 2021, 172). The Dialogue Journaling Process Model, which is the methodology for this empirical research and also one of the objects under study, maps onto Web 2.0 platforms, for example, the Microsoft OneNote platform for a learning company. This means that the actor networks of stakeholder and creatives of a tourism destination are visible as pages of dialogue in an ever-growing, live archive.

Trainees in heritage tourism thus can visualise and simultaneously make this resource more complex by increasing the number of nodes and links. Tourism stakeholders, who are considered actors in

the network concept, can provide links from their web-pages to the urls of the websites of other tourism providers. This internet network again provides a useful map of the density of mutual support in a tourism destination community. Travel writers and bloggers can also participate in this link-building and hence participate and build trust in destination networks. Internet tools, often called spiders, are available to measure the number of backlinks to a destination or local heritage website. Along with the number and quality of the backlinks, the analyst can also see the geographical reach of the backlinks. This helps to determine if the destination, museum or a certain product is discoverable on the everyday websites in countries from where they hope to attract visitors, for example, the US and UK; and whether those sites are in the language of their target visitor-base, in this example, US or UK English.

As professionals in the tourism industry, the creatives have to be aware of how network topologies are changed by relevance, by investment and by remaining active through new campaigns supported by the whole stakeholder community: "Only "relevant" DMM [Destination Management and Marketing] processes can reasonably generate turning points or change the system topology (Getz & Page, 2016) and destination investments able to create new product development or to enlarge the local supply" (Sainaghi & Baggio, 2021, 173).

To remain aware of this requirement for relevance, the dialogue with experts, with statistics and with stakeholders offers a live connection to test out the validity of campaign storylines to pursue. On the platform, alongside its templates designed for constructing narrative content, this function was served by the chat option in MS Teams.

CONCLUSION

Travel writing is a versatile genre with many potential functions. Through the utilization of digital tools, new media, and advanced technologies, the amalgamation of written content with digital platforms has the potential to efficiently enhance the uniqueness of diverse tourism products, services, attractions and destinations. It has clearly become an instrument for fostering consciousness regarding sustainable or unsustainable practices. It serves not only as a mechanism for promoting the branding of attractions, products, places, and destinations, but also functions as a tool for engaging stakeholders, an instrument of self-exploration and identity development, signifying its significance in these domains.

In the conclusion, the initial hypothesis can be confirmed and the research questions can now be answered and lay out lines of research for future studies:

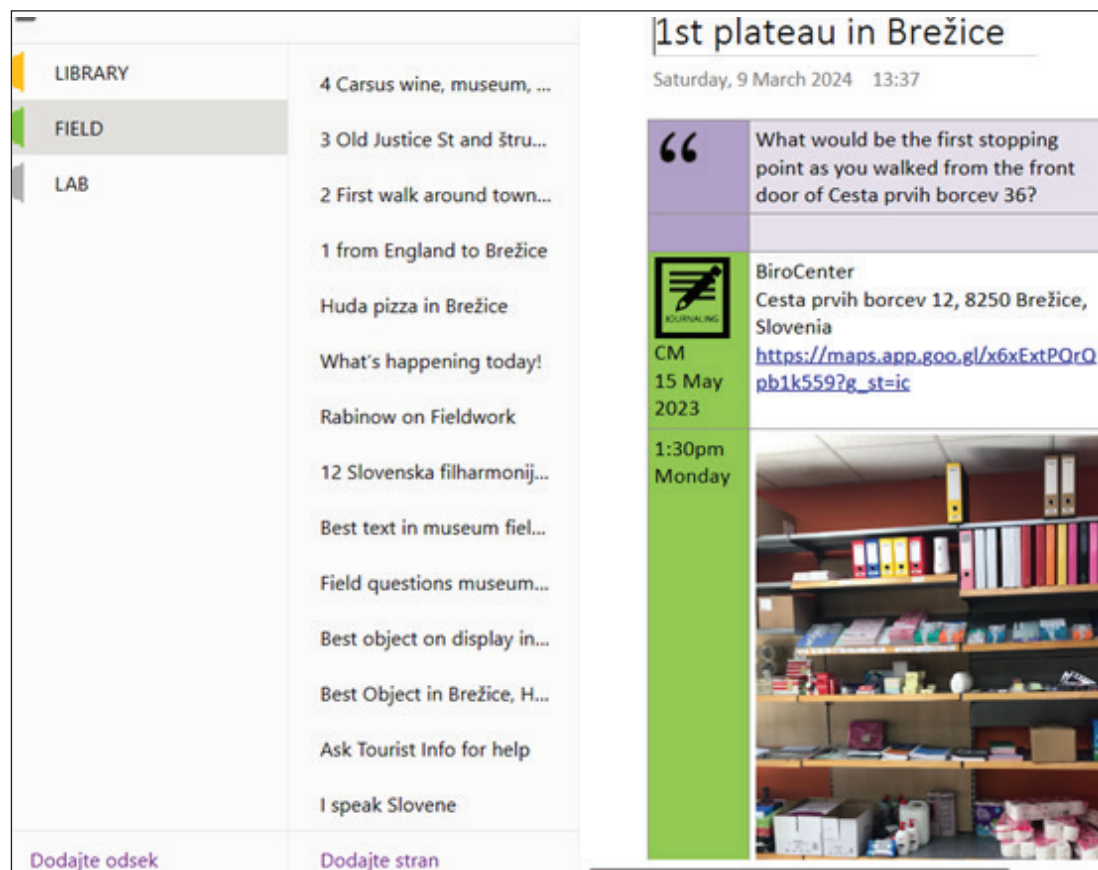


Figure 3: Print screen of a platform repository in OneNote created during training (Source: Mansfield & Potočnik Topler).

R1: How can this model for travel writing projects contribute to cultural heritage awareness?

By sharing personal experiences on the dialogue journaling platform, the creatives and industry stakeholders can highlight cultural heritage sites, discuss travel impacts, such as carbon emissions, and present eco-destinations; in this way the co-operative process of travel writing significantly contributes to cultural heritage awareness. The interim outputs, particularly at the end of 'Step 2 Fieldwork Reporting', provide a formal moment in the process to enter in dialogue over draft versions of any content assets.

R2: How can responsible behaviour be encouraged by employing dialogue journaling as a process in travel writing?

Composing texts in a collaborative environment elicits ethical tacit knowledge (McQueen & Janson, 2016) to create travel writing to inspire and encourage responsible behaviour. When the writers are providing insights into the local culture, artefacts and customs the travel writers are aware that local stakeholders are reading their initial

journaling before it becomes a published output; this encourages the locals to take time to educate the writers about the nuances of their cultures and emphasise the expected behaviours, and explain why particular artefacts and customs are preserved. By describing efforts in conserving resources, reducing waste, and respecting wishes and goals of the local community, travel writers can present sustainable accommodation, businesses and tour operators. Further on, travel writers may acknowledge the significance of local economies, suggest local products and promote voluntary work.

R3: How can employment of processual and literary travel writing further encourage sustainable destination branding?

By raising awareness, promoting responsible travel, and providing valuable information to travellers, employment of travel writing can play a significant role in encouraging sustainable destination branding by offering responsible travelling tips, pointing out sustainable destinations and eco-friendly or low carbon activities, by cooperation with the local community, local organisations,

museums, galleries, restaurants, schools, transportation companies etc. Through demonstrating what is important, special, and worth doing in chosen communities, travel writers can contribute to a shift in the travel industry towards more sustainable and responsible practices. Trustworthy travel writers' texts have the power to impact travellers' choices and behaviours, ultimately helping to protect the environment, preserve cultures, and benefit local communities in a more sustainable manner.

R4: How to monitor the process of collaborative co-creation in exploring heritage?

Effectively monitoring the collaborative co-creation process within the context of the travel writing 3-step model (1. Deep-mapping and Route Design, 2. Fieldwork, 3. Recounting the travel story)

necessitates specific steps and measures. Initial steps involve clearly defining objectives and assessing parameters such as the number of participating stakeholders, the quality of generated ideas, and shifts in public awareness. To facilitate successful stakeholder collaboration, pre-scheduled meetings for interviews, data gathering, feedback, and analysis prove beneficial. Leveraging online tools, such as MS Teams, aids in organizing and monitoring the travel writing processes. Monitoring the collaborative co-creation process in exploring cultural heritage (and other) issues and raising awareness about them is an ongoing and iterative effort. This ongoing effort ensures that collaboration remains aligned with its objectives, attains its goals, and delivers positive outcomes for everyone involved.

POTOPIŠNO PRIPOVEDNIŠTVO KOT SREDSTVO ZA PROMOCIJO KULTURNE DEDIŠČINE

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POVZETEK

Članek opisuje študijo, ki prispeva k opolnomočenju raziskovalcev in kreativnih ustvarjalcev s področja turizma, še posebej tistih, ki vstopajo v poklice, povezane z upravljanjem destinacij, vključevanjem deležnikov, ohranjanjem dediščine in s komuniciranjem podobe destinacije. Metoda zapisovanja dialoga kot del procesa potopisnega pripovedništva se sklada s Tribovim konceptom izobraževanja filozofskega praktika in omogoča vključevanje deležnikov na destinaciji, vodenje sodelovanja z različnimi deležniki, so-ustvarjanje različnih vsebin, načrtov in turističnih proizvodov ter sooblikovanje trajnostnih skupnosti in posledično trajnostnega razvoja. Za potopisce in ustvarjalce vsebin na družbenih omrežjih v turizmu so veščine ustvarjanja vsebin ključne pri so-ustvarjanju trajnostnih turističnih izkušenj, saj so interaktivne in participativne. Povezovanje deležnikov pa je ključno pri upravljanju turističnih destinacij. Cilja študije sta implementiranje in izboljšanje postopka zapisovanja dialoga kot ponovljive metodologije v turizmu in destinacijskem menedžmentu. Gre za 3-stopenjsko procesno raziskovalno metodologijo, ki je pojasnjena prek študije primera v Brežicah (Slovenija) z deležniki in vodji projekta. Članek torej na praktičnem primeru ovrednoti tovrstno pripravo za turistično industrijo in prikazuje, kako ta nova metodologija naslavlja dogovorjeni cilj UNWTO 2030 za vključevanje in izobraževanje deležnikov v turizmu. Z analizo praktičnega primera v realnem svetu, ki ponuja ponovljivo rešitev za Agendo 2030 za doseg trajnosti v upravljanju in razvoju turizma tako članek med drugim pomembno prispeva k naslavljanju praktičnih vprašanj in k praksi upravljanja turizma z vključevanjem deležnikov.

Ključne besede: razvoj turizma, vključevanje deležnikov, metoda zapisovanja dialoga, sodelovanje in soustvarjanje, promocija kulturne dediščine, potopisno pripovedništvo

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received: 2023-07-26

DOI 10.19233/ASHS.2024.32

WHO SETS THE AGENDA IN THE HYBRID MEDIA SPHERE? THE ROLE OF MASS MEDIA IN THE SLOVENIAN TWITTER (X) MIGRATION DEBATE

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ABSTRACT

Building on the hybrid media system model, our study examines mass media's role in shaping the Slovenian Twitter (X) migration debate. The analysis revealed that mass media actors, both "older" and "newer", predominantly with a right-wing orientation, were among the most influential users. The discourse analysis of the most retweeted tweets revealed the coexistence of security and humanitarian perceptions on migration, indicating that Twitter's migration discourses did not significantly deviate from those prevalent in mass media. Our findings illustrate how mass media have effectively adapted to Twitter's media logic, utilising it as a channel for content distribution.

Keywords: migrant "crisis", Twitter (X), mass media, hybrid media system, security discourse, political actors, right-wing

CHI STABILISCE L'AGENDA NELL'AMBITO DEI MEDIA IBRIDI? IL RUOLO DEI MASS MEDIA NEL DIBATTITO SU TWITTER (X) RIGUARDANTE L' IMMIGRAZIONE IN SLOVENIA

SINTESI

Basandoci sul modello del sistema mediale ibrido, il nostro studio esamina il ruolo dei mass media nel modellare il dibattito su Twitter riguardante l'immigrazione in Slovenia. L'analisi ha rivelato che gli utenti dei mass media, sia "vecchi" che "nuovi", con un orientamento prevalentemente di destra, sono tra gli attori più influenti. L'analisi del discorso sulla migrazione, tramite i tweet più ritwittati, rivela la coesistenza di prospettive di sicurezza e umanitarie, dimostrando che i dibattiti sulla migrazione su Twitter non si discostano significativamente da quelli prevalenti negli altri mass media. I risultati evidenziano come i mass media si siano adattati alla logica di Twitter, usandolo per diffondere i propri contenuti.

Parole chiave: "crisi" migratoria, Twitter (X), mass media, sistema mediale ibrido, discorso sulla sicurezza, attori politici, destra

INTRODUCTION

Since 1991, Slovenia has experienced three mass arrivals of migrants: Bosnian migrants in 1992–1993; migrants from the former Soviet Union, Asia, the Middle East, and Africa between 1999–2001; and migrants from Syria, Afghanistan, and Iraq during 2015–2016 (Žagar Žnidaršič, 2018). Compared to earlier periods, the most recent has coincided with the rise of the online digital media sphere, transforming “traditional” mass media and contributing to the emergence and rapid spread of “newer” social media platforms (Chadwick, 2017). The latter, specifically Facebook and Twitter, (now X)¹ provided the most current information pertaining to the events along the so-called Balkan migration route (Lecheler et al., 2019). Thus, the latest period was communicated through both mass and social media (Srnrdelj, 2021).

The aforementioned transformations in the media sphere present both theoretical and methodological challenges for media and migration studies, particularly in analysing the interconnectedness of mass and social media (Smets et al., 2019). These changes have rendered mass and social media inseparable, emphasising the importance of considering their interplay in research. The hybrid media system model (Chadwick, 2017) addresses this interconnectedness, offering a framework for analysing the contemporary media sphere amidst recent technological and social shifts.

Despite the mass and social media’s coexistence in the contemporary media sphere, the hybrid media system model is rarely applied in studies examining migration in the media. While some relevant studies can be found internationally (e.g., Bennett, 2016; Ojala et al., 2019; Pöyhtäri et al., 2021; Siaperä et al., 2018), such research is notably scarce in Slovenia. To address this gap, we employ the hybrid media system model in our analysis,² focusing on the role of mass media in shaping the Twitter agenda during the third period of mass migration to Slovenia, i.e. the 2015–2016 migrant “crisis.”³ This period, spanning from the second half of 2015 to early 2016, was marked

by significant migration to Europe, mainly from Syria, Afghanistan, Iraq, and other nearby countries (Eurostat, 2019; Government of the Republic of Slovenia, 2016). After Hungary closed its border on 17 October 2015, Slovenia became a transit country for migrants⁴ attempting to reach Germany or other destinations in Northern or Western Europe. Subsequently, the Balkan migration route shifted from the previous trajectory of Serbia-Hungary-Austria-Germany to a new path of Serbia-Croatia-Slovenia-Austria (Malešič, 2017, 953).

With most citizens lacking direct contact with migrants, the media—both mass and social—became the primary information sources on the evolving migrant situation, significantly shaping the perception of the migrant “crisis” (Kogovšek Šalamon & Bajt, 2016). Twitter, the empirical basis for our analysis, hosted a heated debate about the arriving migrants. We focus on Twitter because, compared to the more popular Facebook, it is more accessible to the public; virtually everyone, including non-users, can view posts (Jesenšek et al., 2021). In addition, compared to Facebook, which is more oriented towards maintaining social dynamics, Twitter concentrates more on current socio-political debates (Verweij, 2012, 682). This focus also explains why mass media institutions frequently use Twitter as a news source (Moon & Hadley, 2014).

The primary objective of our study is to investigate the role of mass media in shaping the Twitter debate on the migrant “crisis” in Slovenia. Our analysis is grounded in the theoretical framework of the hybrid media system model, and it operationalises this framework by examining both the central users and the most retweeted tweets within the entire Slovenian Twitter debate on the migrant “crisis.” Specifically, we explore the linkages between central users and mass media, and the alignment between the discourses of the most retweeted tweets and those prevalent in mass media. Through this exploration, we aim to determine whether “traditional” mass media sets the agenda for the Twitter migration debate, or whether there are distinctive migration discourses on Twitter that diverge from the those typically found in mass media. The main

1 In July 2023, the platform formerly known as Twitter was rebranded as X. Nonetheless, this paper retains the original name, Twitter, as the discussions analysed herein occurred prior to the rebranding.

2 This research was conducted as part of the research programme Problems of Autonomy and Identities at the Time of Globalisation (P6-0194, 2019–2024), funded by the Slovenian Research Agency, and as part of the activities funded by the Eng. Milan Lenarčič University Foundation. This article’s analysis draws from the author’s doctoral dissertation titled *The Construction of the Refugee Crisis in Slovenia from the Perspective of the Hybrid Media System* (2022). Some PhD sections included in this article also appear in modified form in Srndelj (2021; 2024).

3 We place the term “crisis” in quotation marks to distance ourselves from the media and political depiction of migration to Europe as a “crisis”. Social crises are not always genuine crises but are often constructed as such by the media and politics (Vezovnik, 2018; Srndelj & Vogrinc, 2020).

4 Following IOM (2019), we utilise the term “migrant” to refer to any individuals who have crossed international borders, irrespective of their reasons for leaving their home country and whether they merely travelled through Slovenia or sought asylum there. We have chosen not to include these distinctions because we consider all migration legitimate, regardless of the departure reasons. However, we are attentive to how migrants are portrayed in media discourse, particularly the labels used to describe them. Such labels imply specific attitudes towards them (for example, the label “refugee” in media discourse suggests more rights and benefits than the label “illegal migrant,” regardless of the actual type of the migration involved).

reason for focusing primarily on mass media, rather than any other social group in the Twitter debate, is to gain direct insight into whether Twitter facilitates the production of discourse independent of mass media, given that users can create their own content, or whether “traditional” sources of information continue to dominate the debate. In other words, it is crucial to assess whether mass media, which were the principal sources of information on migration developments even before the emergence of social media, continue to dominate the digital media sphere, particularly in the Twitter migration debate.

To achieve our objective, we first outline our theoretical framework for a hybrid study of digital media. Next, by drawing on existing literature, we present the main discourses found in both mass and social media, aiming to establish a foundation for identifying categories for our empirical analysis. This is followed by a literature review clarifying the contribution of our research in studying migration on Twitter from a hybrid perspective. We then detail our research questions, sampling approach, data collection methods, and analysis techniques. Finally, we present our results and then discuss the key findings of our study.

THEORETICAL FRAMEWORK: OPERATIONALISING MEDIA HYBRIDITY AND INFLUENCE

The hybrid media system model provides a theoretical foundation for examining media hybridity, exemplified in our study by the interplay between Twitter and mass media. However, this model has limited explanatory power in thematising media influence, which is key to understanding power dynamics within the contemporary digital media sphere. To enhance its explanatory capacity, we supplement it with agenda-setting theory (McCombs, 2014) and network theory (Lindgren, 2017; Schroeder, 2018).

The hybrid media system model challenges the linear conception of media history, where one medium supersedes another. Instead, the hybrid approach implies that “older” and “newer” media coexist and interact with the media sphere. This interaction is evident as “newer” social media platforms evolve and “older” media, such as newspapers, radio, and TV, adapt to the dynamics and logic of social media. Therefore, in the contemporary media sphere, no medium can be analysed as “pure” and “separate” from the others, hence we examine Twitter’s interactions with mass media (Chadwick, 2017, 28–48).

The hybrid media system model, while insightful, lacks a thorough theoretical consideration of media influence. Consequently, it alone does not suffice to explain the relevance of focusing on the most influential users and the most retweeted tweets. For this reason, we integrate agenda-setting theory, a

more traditional media theory that originally focused on the impact of mass media on audiences (McCombs, 2014). Agenda-setting theory posits that the media determine the topics considered most important and relevant by the public. Specifically, topics that dominate media reporting tend to generate the greatest public interest (Oblak, 2000; Pajnik, 2003). Accordingly, the media not only determine the “list” of most significant topics, but also suggest how to understand these topics (Ceron et al., 2017, 8). It is important to note, however, that the prominence of certain topics in media discourse does not necessarily reflect their actual importance and relevance to the public, but rather the importance attributed to them by the media. This dynamic often results in marginalisation of topics and perspectives from those lacking power and influence (Weinberg, 2007, 63). Therefore, to comprehend the prevalent public construction of a particular topic in the online digital media sphere, it is necessary to scrutinise the most prominent users and posts. Focusing on the top of the agenda is even more important in the online digital media sphere, where there are numerous posts, but only a small percentage attain visibility and influence (Al-Rawi, 2019).

But how can we determine what will rise to the top of the agenda in the digital media sphere? How can we define these criteria to enable direct translation into empirical analysis? To make this possible, network analysis must also be employed in our research (Lindgren, 2017). According to this approach, not all network users occupy the same position in online debates, as they vary in terms of their influence and activity. The most influential and/or most active users are considered central users (Jesenšek et al., 2021; Xie & Luo, 2019). In our study, we follow the definition of influence as the power of a user to shape others’ opinions on a given topic (e.g., Al-Rawi, 2019; Dang-Xuan et al., 2013). We measure influence using retweets which indicate interest and support for an author and their posts (Metaxas et al., 2021). Thus, the most influential users are those whose tweets receive the most retweets, and the most influential posts are those that garner the most retweets. Furthermore, retweets serve as a measure activity. Accordingly, the most active users are those who generate the most retweets (Jesenšek et al., 2021). From the perspective of agenda-setting theory, central users and the most retweeted tweets occupy the top positions on the Twitter agenda.

Having introduced the assumptions of the three theoretical approaches presented above, it is evident that collectively, they offer significant theoretical potential for studying contemporary digital media. The hybrid media system model provides starting points for examining the interconnectedness of mass and social

media. Complementarily, agenda-setting theory and network theory enhance our understanding of media influence. Agenda-setting theory suggests that users and issues dominating the media agenda exert greater influence, while network theory provides a framework for operationalising influence within a networked digital media sphere.

Finally, our research adopts a critical approach and refrains from making assumptions about whether Twitter has enhanced or diminished current power relations. We do not subscribe to the “optimistic” approach that prevailed at the beginning of the internet era, which presupposed the democratisation of society through “newer” media platforms where users generate content, in contrast to mass media controlled by journalists and editors. Similarly, we reject the “pessimistic” perspective on “newer” media, which categorically dismisses their potential to facilitate democratisation and social change in advance (Avraamidou et al., 2021; Bennett, 2021). Instead, we interpret the results of our analysis in the Discussion section by prioritising a critical approach that does not presuppose “optimistic” or “pessimistic” outcomes in advance but rather focuses on the structural conditions that could explain the findings of our analysis.

PRODUCING “OTHERNESS”: MEDIA DISCOURSES CONSTRUCTING THE MIGRANT “CRISIS”

According to previous research on the media construction of the migrant “crisis” (Eberl et al., 2018; Smrdelj, 2021; 2022), migrants who arrived in Europe during this period were portrayed in both mass and social media as “others” in relation to the “dominant” society represented by European citizens. This “Otherness” emerged from negative discourses⁵ aimed at justifying the rejection of migrants, notably those related to security, criminalisation, and nationalist discourses. The aforementioned negative discourses on migration are the most prevalent ones encountered in the media (cf. Smrdelj, 2021; 2022).

The security discourse portrays migrants as threats to both public and cultural safety, a view that was intensified by global incidents such as the 9/11 attack, positioning migration predominantly as a security issue (Bigo, 2005). This perspective is complemented by the criminalisation discourse, which labels migrants as criminals for illegal border crossings and alleged offenses such as theft, public disruption, and drug trafficking (Smrdelj & Vogrinc, 2020). Additionally, existing literature discusses “crimmigration,” a term coined to describe the growing interweaving of criminal and migration proceedings (Bajt & Frelih, 2019).

The interplay of security discourse, criminalisation discourse, moral panics, and emergencies results in a “securitization of migration,” (Malešič, 2017; Vezovnik, 2018; Smrdelj & Vogrinc, 2020), which portrays the dominant understanding of contemporary migration as a security issue, overshadowing social, economic, or humanitarian concerns.

In addition to security and criminalisation discourses, migrants are often depicted negatively through nationalist discourse, which emphasises host nation identity, culture, and socioeconomic interests over migrant rights (Ješe Perković & Učakar, 2017). Using Anderson’s (2006) terminology, nationalist discourse describes how a community imagines its nationality and identity in relation to incoming migrants. Mihelj (2004) identifies two distinct types of national imagination in Slovenia’s context: ethno-nationalist, which perceives Slovenia as a country of all blood-related Slovenians to the exclusion of other ethnic groups, and civic-nationalist, which considers all residents with citizenship as Slovenians, regardless of their ethnicity. Moreover, Mihelj (2004) demonstrates that the ethno-nationalist national imagination dominated media reporting during the first and second mass arrivals of migrants to Slovenia.

In addition to unfavourable portrayals of migrants, research indicates that media can also promote sympathy, protection, and support for migrants, providing them with a platform to convey their experiences. A notable example of positive media representation is the humanitarian discourse, which depicts migrants as victims of conflict and poverty. However, this approach can unintentionally perpetuate stereotypes and discriminatory power dynamics by portraying migrants as helpless, thereby undermining their agency, rights, and positive contributions to society (Smrdelj & Vogrinc, 2020). Thus, it is essential to critically examine the implicit assumptions that may unintentionally perpetuate discriminatory and stereotypical exclusionary practises.

LITERATURE REVIEW: MIGRATION ON TWITTER FROM THE HYBRID PERSPECTIVE

When examining migration on social media, Twitter is the most commonly studied platform (Smrdelj, 2022), presumably because all Twitter data was freely accessible via the Twitter API until February 2023 (Peters, 2023). However, studies on migration using Twitter rarely employ the hybrid media system model. When applied, it is used in three distinct ways: as a framework for analysing URL links to other online content posted on Twitter (Bennett, 2016; Pöyhätari et al., 2021); as a model for studying interactions between government, public,

⁵ Following Fairclough (1992, 63–64), we define discourse as a set of forms of representation of a particular topic, focusing on how social power relations are represented within a particular text.

and mass media (Ojala et al., 2019); and as a means of studying the relationship between mass and social media, optimistically assuming that the former amplifies the voices of social power and influence, while the latter enables the articulation of all voices, including those of minority groups (Siapera et al., 2018).

The studies mentioned, which focus on different national contexts in Europe, find that politicians, mass media, and established NGOs are central Twitter users. In contrast, “alternative” users tend to occupy less visible positions (Siapera et al., 2018). Furthermore, right-wing political users instrumentalize Twitter’s migration debate (Bennett, 2016). Ojala et al. (2019), however, argue that Finland’s hybrid media system encourages citizens to hold the government accountable. These analyses also reveal that Twitter’s migration debate is dominated by negative discourses such as security and criminalisation discourse (Pöyhtäri et al., 2021; Siapera et al., 2018), as well as by humanitarian discourse, which became particularly prominent when the image of the drowned child Alan Kurdi proliferated online (Bennett, 2016).

In discussions of migration on Twitter derived from “big data”, quantitative digital methods are usually utilised (e.g., Lee & Nerghes, 2017; Nerghes & Lee, 2019), whereas qualitative methodological approaches are typically employed to analyse smaller samples of tweets (e.g., Bozdağ & Smets, 2017; Kreis, 2017). In contrast to this prevailing research trends, our study draws on “big data” and applies qualitative methods. Specifically, we examine the entire Twitter debate during the Slovenian migrant “crisis” using agenda-setting theory to focus on the top users and posts.

Compared to the existing research outlined above, the main contribution of our study is to demonstrate how the hybrid media system model, agenda-setting theory, and network theory form a coherent theoretical framework for analysing digital media, focusing particularly on operationalising media hybridity and media influence in the online digital media sphere. Additionally, our contribution also highlights how “big data” can be analysed using qualitative approaches, specifically through critical discourse studies, as we explain in the following section.

METHODOLOGICAL FRAMEWORK

Research Questions

Drawing upon the aforementioned theoretical framework, we operationalised hybridity as the interconnectedness between Twitter and mass media in two distinct ways: at the user level and at the discourse level. At the user level, we identified which users associated with mass media participate in the Twitter debate. At the discourse level, we examined whether the discourses in tweets differ from the migration discourses

prevalent in mass media. Additionally, acknowledging the media reality as a hybrid sphere—where content from one medium interacts with another and vice versa—we also assessed whether the most retweeted tweets include a URL link to mass media content.

On the basis of the operationalisation of media hybridity presented above, we formulate the following three research questions that will be addressed in our subsequent analysis:

- RQ 1: Which users generated the most retweets (the most active users)?
- RQ 2: Which users’ tweets were retweeted the most (the most influential users)?
- RQ 3: What are the most retweeted tweets, and what is their discourse?

In addressing the research questions, our focus centred on the mass media perspective, aligned with our theoretical framework for studying media hybridity. However, we presented not only data directly related to mass media but also all available data relevant to each specific question. This comprehensive approach allows us to define the role of mass media in the debate more precisely. For instance, in identifying the most active users, we included all such users, not just those engaged with mass media, to comprehensively analyse their role in the Twitter debate in relation to other user groups.

Sample & Data Collection

The sample consists of 3,103 users who generated 35,543 tweets (13,189 of which were retweets) between 1 September and 31 December 2015, during the peak of the migrant “crisis” in Slovenia. Data were collected through the Twitter API using Academic Research Access on 25 April 2021, in collaboration with Uroš Godnov, PhD, of the Institute for Data Quality (Slovenian: Inštitut za kakovost podatkov, d.o.o.). The sample included all Slovenian posts containing at least one of the following hashtags, words, and/or root words: “#begunci”, “#migranti”, “#begunskakriza”, “#migrantskakriza”, “#ilegalnimigranti”, “#ilegalci”, “#prebežniki”, “#ŽičnaOgraja”, “begun-”, “migra-”, “prebežni-”, “illegal-” in “azil-”.

Data Analysis Methods

We exported the data from R software to Microsoft Excel for processing using pivot tables, generating three key lists: 1) the users who generated the most retweets (most active); 2) the users whose tweets were most retweeted (most influential); and 3) the most retweeted tweets (most influential posts), each limited to the top twenty. This list-making approach follows the methodologies described by Jesenšek et al. (2021) and Al-Rawi (2019).

In analysing the 20 most active and influential users, our goal was to categorise users based on their connection to mass media (journalists, editors, or media institutions) under the “mass media” category. Additionally, we classified other users into specific categories: those identifiable by their username or profile photo but not publicly recognised as “publicly unknown users”; those using pseudonyms or non-representative images as “anonymous users”; inactive accounts as “unidentifiable”; users involved in parliamentary politics as “political elite”; and users by their professions, such as chemists. We also aimed to identify “weak publics,” including NGOs or social minority representatives.

In our analysis of the top active and influential users, we noticed that some were distinguishable by their known political leanings. Thus, we categorised users based on political orientation when they were publicly recognised for aligning with specific political stances or ideologies within political networks (e.g., left-wing or right-wing). We refrained from assigning political orientations to users without public recognition due to the impossibility of accurately determining their stances. Similarly, we avoided categorising the political orientations of publicly known users when their political leanings were undisclosed or unclear. Our aim in identifying political orientations was to gain insights into the variety of political networks engaging in the debate, acknowledging the complexity of accurately identifying users’ political affiliations and limiting this categorisation to cases where it is publicly evident.

After examining the twenty most active and influential users, our analysis shifted to the twenty most retweeted tweets, conducting a discourse analysis on each. As part of our study on media hybridity, we examined the discourse of the most retweeted tweets to examine whether they resembled the discourses prevalent in the mass media. Furthermore, we specifically sought tweets that contained URL links to mass media content, incorporating this content into our discourse analysis whenever present.

Critical discourse studies (CDS) (Krzyzanowski & Machin, 2017) have been applied to the discourse analysis of each tweet and the potential mass media content accessible via URL links. CDS examines how language legitimises unequal social relations. In this instance, we analyse the social relations between the “dominant” society (the citizens of the host country) and the “minority” society (the migrants). Our discourse analysis primarily focuses on how language establishes and legitimises these social relations, as well as its efforts to disclose and deconstruct them. Fairclough’s (1992) dialectical-relational approach aligns most closely with our perspective within CDS. He contends

that media texts not only reflect and represent social relations, but also concurrently construct and constitute them (Fairclough, 1992, 3). Consequently, power relations are always implicitly embedded within a particular discourse that legitimises hierarchies through ideological mechanisms, and CDS seeks to reveal these mechanisms (Smrdelj & Pajnik, 2022; Smrdelj, 2024).

In our discourse analysis of the most retweeted tweets, we examined how the acceptance or rejection of migrants is justified within the Twitter debate. We were interested in determining whether migrants are portrayed negatively within security or criminalisation discourses, or if efforts exist to counteract such stereotypes through humanitarian discourse. Additionally, we considered the presence of migration discourses outside established categories (e.g., security, criminalisation, nationalist, humanitarian). Our goal was to determine whether the discourse in the most retweeted tweets mirrored that in the mass media, or if an independent migration discourse was emerging, distinct from traditional media and other social power structures.

The presentation of the results is structured into three sections, each addressing one of our research questions. In presenting the results, we clearly identify the aspects relevant to understanding media hybridity. These aspects are explored in depth in the subsequent discussion.

RESULTS OF THE ANALYSIS

Most Active Users

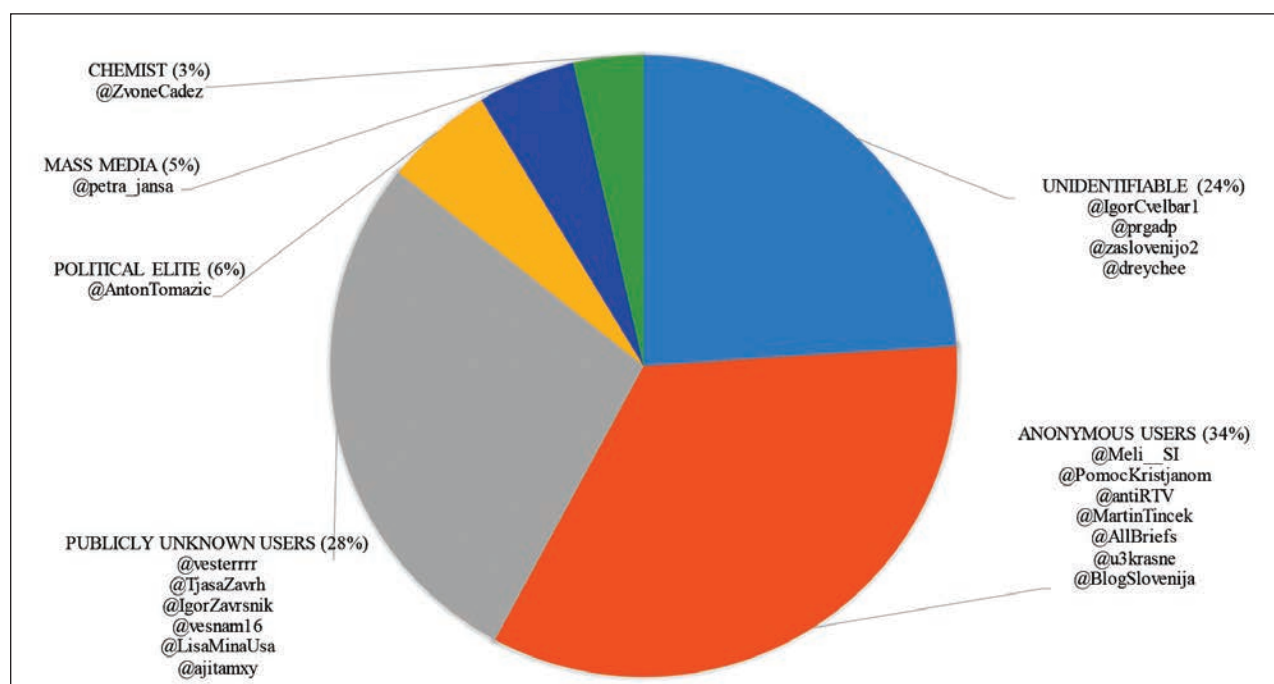
Table 1 lists the sample’s most active users based on the number of retweets they generated. It shows each user’s rank (first column), username (second column), number of retweets (third column), and a category (fourth column), determined by the criteria described in the methodology section above.

According to the classification of users depicted in Graph 1, it is revealed that 62% of the retweets generated by the most active users were produced by publicly unknown and anonymous users. When including unidentifiable users—who are presumed to also be anonymous, as they used pseudonyms—the proportion of retweets produced by publicly unknown users rises to 86%. Only three users, representing the political elite, mass media, and the field of chemistry, are publicly recognised. Together, they accounted for 14% of all retweets generated by the most active users. Based on their public recognition, it can be speculated that all three are connected to the right-wing Slovenian political network.⁶

⁶ The first profile likely represents Anton Tomažič, a former politician and MP. The second profile probably pertains to Petra Janša, a journalist for the right-wing weekly *Demokracija*. The third profile likely belongs to Zvone Čadež, a chemist, member of the right-wing Slovenian Democratic Party (SDP), and current CEO at the University Rehabilitation Institute of the Republic of Slovenia Soča.

Table 1: Most active users.

Rank	Users	Retweets	Category	Political Orientation
1	@IgorCvelbar1	238	unidentifiable	/
2	@prgadp	206	unidentifiable	/
3	@Meli__SI	191	anonymous user	/
4	@vesterrrr	190	publicly unknown user	/
5	@TjasaZavrh	189	publicly unknown user	/
6	@AntonTomazic	184	political elite	right-wing
7	@zaslovenijo2	179	unidentifiable	/
8	@IgorZavrsnik	174	publicly unknown user	/
9	@PomocKristjanom	168	anonymous user	/
10	@petra_jansa	165	mass media	right-wing
11	@antiRTV	164	anonymous user	/
12	@MartinTincek	161	anonymous user	/
13	@dreychee	160	unidentifiable	/
14	@AllBriefs	158	anonymous user	/
15	@u3krasne	138	anonymous user	/
16	@BlogSlovenija	127	anonymous user	/
17	@vesnam16	119	publicly unknown user	/
18	@LisaMinaUsa	119	publicly unknown user	/
19	@ZvoneCadez	118	chemist	right-wing
20	@ajitamxy	118	publicly unknown user	/
	Total	3,266		

**Graph 1: Proportions of most active users by category and their retweet production (Source: own analysis).**

In the context of our examination on media hybridity, it is noteworthy that only one user, accounting for 5% of all retweets made by the most active users, has ties to the mass media. This profile likely belongs to already mentioned Petra Janša, a journalist from the weekly magazine *Demokracija*.

Most Influential Users

Table 2 lists the most influential users based on the number of retweets their posts received. It shows each user's rank (first column), username (second column), number of retweets (third column), and a category (fourth column), determined by the criteria described in the methodology section above.

In contrast to the most active users, the most influential users are—with the penultimate user in Table 2 as the only exception—publicly recognised actors. Data in Graph 2 reveals that 65% of the retweeted posts from the most influential users in the sample originated from users associated with the mass media, 28% from the political elite, 4% from a user publicly known as an architect, and only 3% from an anonymous user.

In the context of our examination of media hybridity, it is important to note that among the most influential mass media-related users, we find eight mass media (Reporter, Nova24TV, 24ur.com, Domovina, Delo, STA, Demokracija, Večer), four Slovenian journalists (Peter Žerjavič, Srdjan Cvjetović, Bojan Požar, Vinko Vasle) and one editor (Jože Biščak). Print media dominate, while television media represent a smaller proportion. Furthermore, non-commercial mass media (e.g., public broadcaster RTV Slovenia, Radio Študent) and radio media do not feature among the top twenty most influential users.

Excluding the Slovenian government profile, all political elite users are right-wing and closely associated with the right-wing SDP, which was the largest opposition parliamentary party during the migrant “crisis” in Slovenia. Similarly, right-wing mass media-related users are prominent, with the top two influential mass media users being right-wing oriented (Reporter, Nova24TV). Specifically, 64% of the retweeted posts from the most influential users in the sample originated from users that can be related to the right-wing political network.

Most Retweeted Tweets

Table 3 displays a list of the top twenty retweeted tweets. Since the data obtained does not contain full tweet content (e.g., attached images), we additionally

examined the original Twitter posts using their ID number.⁷ Our discourse analysis revealed that the top twenty retweeted tweets can be divided into two categories. The first category includes posts that reinforce negative stereotypes about migrants (posts 1, 2, 7, 8, and 12–19) (59%).⁸ Among these, posts 2, 7, 8, 13, 14, and 19 are based on security-related discourse, representing 31%. The second category consists of posts that utilise an inclusive and empowering discourse to challenge negative perceptions of migrants (posts 3–6, 9–11, and 20), making up 41% of the list. In the following, we present both categories in detail.

In the first category, the discourse of the Slovenian police reinforces the perception of migrants as “others” by accentuating their “foreignness” (post 1). Furthermore, the “majority” is portrayed as a “minority” and vice versa. Specifically, members of the “dominant” society (Slovenes) are portrayed as “second-class” victims of violence, while migrants are denied minority status (post 15). Moreover, government statistics classify migrants as “deserving” (mothers and children) and “undeserving” (young males over 18 who should remain and defend their own nations) (post 18). Migrants are also blamed for economic harm in areas adjacent to the Slovenian border (post 16). Slovenia is portrayed as a transit country, not a destination country like Germany, which discourages the reception of migrants (post 17). Another aspect contributing the construction of migration as a “crisis” is the outrage over Greeks providing a map to “illegal migrants” that directs them to Slovenia (post 12).

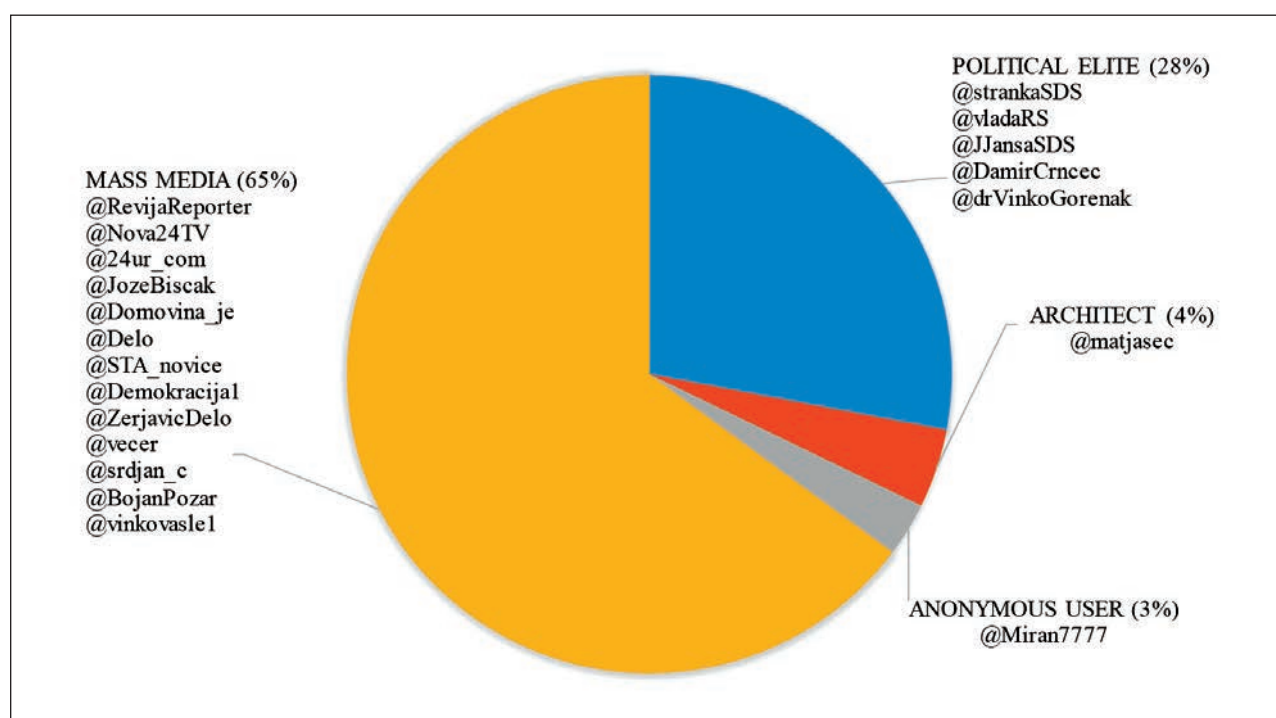
The perception of migrants as a security risk to the “dominant” society particularly notable within first category of posts. Numerous security measures are demanded in the context of portraying migrants as security threats. For example, to prevent migrants from entering Slovenia, the Slovenian government is pressured to close the country's borders, following the example of Hungary (post 2). Additionally, stricter asylum laws and a discriminatory Islamic law akin to those in Austria are also advocated (post 8). The state's repressive apparatuses, such as the police and army, are accorded a prominent role in managing migration, suggesting that migration is primarily viewed as a security concern (post 14). Mocking the concept of hate speech, “refugees” are cynically associated with “terrorists” (post 13), and the uncontrolled entrance of migrants is condemned as a threat to Slovenia's security (post 19). There are concerns about the government's transparency regarding security screenings of migrants, suggesting that potentially harmful migrants may be allowed entry into the country (post 7).

⁷ For the purpose of this study, we translated the original Slovenian tweets into English, ensuring the preservation of the original punctuation and stylistic nuances.

⁸ This share, along with others in this subsection on the most retweeted tweets, refers to the total number of retweets the top 20 posts received.

Table 2: Most influential users (Source: own analysis).

Rank	Users	Retweets	Category	Political Orientation
1	@RevijaReporter	448	mass media	right-wing
2	@strankaSDS	326	political elite	right-wing
3	@Nova24TV	311	mass media	right-wing
4	@24ur_com	309	mass media	/
5	@vladaRS	301	political elite	/
6	@JozeBiscak	291	mass media	right-wing
7	@Domovina_je	236	mass media	right-wing
8	@JJansaSDS	235	political elite	right-wing
9	@Delo	184	mass media	/
10	@matjasec	179	architect	/
11	@DamirCrncec	171	political elite	right-wing
12	@STA_novice	154	mass media	/
13	@drVinkoGorenak	146	political elite	right-wing
14	@Demokracija1	146	mass media	right-wing
15	@ZerjavDelo	139	mass media	/
16	@vecer	138	mass media	/
17	@srdjan_c	137	mass media	right-wing
18	@BojanPozar	124	mass media	right-wing
19	@Miran7777	122	anonymous user	/
20	@vinkovastle1	115	mass media	right-wing
	Total	4,212		

**Graph 2: Proportion of most influential users by category (social group) (Source: own analysis).**

The second category of posts challenges the negative stereotypes associated with migrants. Specifically, the security discourse is deconstructed by explaining that migrants are fleeing danger rather than posing a threat (posts 3 and 9). The binary stereotyping of “us” and “them” is also dismantled by elaborating that the problem lies not with “them,” the “refugees,” but with the “domestic phobias” of “us” representing the “dominant” society (post 6). In addition, the notion that migrants will Islamise Europe is countered by highlighting their pursuit of a better life, as opposed to “priests” who travelled under the guise of humanitarian work to spread Christianity (post 5). The perception of arriving “migrants” as “others” and “non-Europeans” is deconstructed by pointing out that “our,” “European,” identity is founded on historical figures such as Jesus Christ and Primož Trubar, who had similar experiences to the migrants arriving in Slovenia (post 10). A humanitarian discourse is established by providing prepaid phone cards to migrants (post 11) and by exposing the contradictions of the anti-humanitarian discourse, which argues that Slovenia cannot afford to help “refugees” because we must first care for “our own” people in need. It is revealed that when migrants are present, Slovenians in need are given priority; in their absence, such concerns may not receive equivalent attention (post 4). Additionally, post 20 includes a photograph of a sleeping migrant infant on the floor and urges the then-Prime Minister Miro Cerar to take action against such human suffering.

The labels used to describe migrants varies across the analysed posts. In the first category, migrants are often labelled as “foreigners” (e.g., in police discourse) or as “illegal migrants” in posts focused on security issues. The term “illegal migrants” emphasises their non-legal status resulting from illegal border crossings, overshadowing all other facets of their complex migration experience by portraying them primarily as criminals (Žagar Žnidaršič, 2018). In contrast, the term “refugee” is the most commonly used in discourse that aims to be non-discriminatory towards migrants. This usage likely stems from the notably advantageous status the term conveys, granting migrants numerous benefits and rights.

In our analysis of media hybridity, it is notable that only two of the top twenty most retweeted tweets (posts 12 and 15) include links to mass media content, accounting for 9%. Post 12 references a reaction from Slovenia to a map distributed to “illegal migrants” in Greece, citing the Croatian online news source *Jutranji List*. In this context, then-Interior Minister of Croatia Ranko Ostojić was reported saying that Croatia has a contingency plan should Hungary close its borders. However, post 12 utilises this news piece to question whether Slovenia is similarly prepared for such an eventuality. In post 15, the author challenges

perceptions by asking if anyone has witnessed “refugee” violence, referencing a statement by Danilo Türk in an Al Jazeera Balkans news article. This rhetorical question aims to refute the portrayal of migrants as a minority group and instead suggest that Slovenians are the true victims of “violence” due to the migrant situation. In contrast, the discourse in the news tends to be more positive towards migrants, framing migration as a humanitarian issue, yet still distinguishing between “deserving” and “undeserving” migrants.

DISCUSSION

Our analysis revealed that most of the top active users are not publicly known (RQ 1). The majority of the most influential users are members of the right-leaning media and political elite (RQ 2). Additionally, the discourse analysis of the top twenty retweeted tweets reveals that these posts predominantly engage in discourse that aims to reinforce negative stereotypes about migrants, focusing on security concerns associated with migrant arrivals (RQ 3).

In accordance with the hybrid media system model, the interplay between mass media and Twitter was operationalised at the levels of users and discourses. This interaction proved significant, particularly in the case of the most influential users and the most retweeted tweets. Notably, posts from influential users affiliated with mass media accounted for the highest proportion of retweets (65%), underscoring their pivotal role in shaping the Twitter debate. These users adeptly adapting to Twitter’s media logic, using the platform as a conduit for disseminating their content. Moreover, the discourse practices observed in the top twenty most retweeted tweets on migration, encompassing both security and humanitarian discourse, reflect those commonly seen in mass media reporting (Smrdelj, 2021). This indicates a similarity in the dominant discourses between Twitter and mass media.

Conversely, the interaction between mass media and Twitter proved to be minimal concerning the most active users and the inclusion of URL links. Mass media accounts for only 5% of all retweets generated by the most active users. Given that Twitter debates are typically driven by publicly unknown users who retweet the posts of influential users (cf. Jesenšek et al., 2021), it is not surprising that media and other publicly visible social groups, such as politicians, do not dominate among the most active users. Similarly, only two of the top twenty most retweeted tweets include URL links to mass media content. This observation leads to the speculation that “algorithms” (Onitui, 2021) may be designed to keep users engaged on the platform for extended periods. Consequently, they tend to display content that does not contain URL links to

Table 3: Most frequently retweeted tweets (Source: own analysis).

Rank	Text	Retweets
1	RT @policija_si: According to initial data, the police used gas spray against violent protesters, not against foreigners. #begunci	50
2	RT @JjansaSDS: Hungary will close its border with Croatia for migrants tomorrow. We urge the@vladaRS to take the same measure simultaneously.	46
3	RT @FranciKek: How can someone be so stupid and evil not to see that refugees are fleeing from what happened in Paris and are not part of ISIS.	41
4	RT @Pizama: A: Children are hungry. Let's help them. B: There are no hungry children here. This is propaganda. A: Let's help refugees. B: Why doesn't anyone help children?	39
5	RT @SafetAlibeg: When refugees knock on Europe's door, it is Islamization, when priests go to Africa to spread faith in Jesus, it is humanitarian work.	36
6	RT @SafetAlibeg: Our problem is not refugees. They will come and mostly leave. Our problem is domestic phobias. They will stay.	36
7	RT @JjansaSDS: They are lying to you how they security-check every migrant. And take finger prints. @vladaRS is lying to you big time. https://t.co/O5ty3 ...	35
8	RT @ZanMahnic: Measures FOR security: 1.) Immediate border closure for all illegal migrants 2.) Changes in asylum legislation 3.) Law on Islam modelled on Austria	34
9	RT @ntokomc: We need open borders and safe passage for refugees. Everything else is barbarism that we will pay dearly for. #blog http://t.co/C ...	31
10	RT @ervinmh: Christ was a refugee. So was Trubar. If they had drowned, we wouldn't have Christian foundations.	31
11	RT @TelekomSlo: We will help refugees stay connected with their relatives using prepaid cards. We want to at least slightly brighten their day. http:// ...	30
12	RT @DamirCrncec: How will we in Slovenia take a stance on the map that the Greeks are sharing to illegal migrants? http://t.co/k7VSIKA9rG http://t ...	30
13	RT @BojanPozar: One French terrorist came to Paris as a refugee. Now I don't exactly know, is reporting about this hate speech or not. I'm waiting for advice from @nmusar.	29
14	RT @JjansaSDS: Slovenia is grateful to @policija_si @Slovenskavojska volunteers and everyone else working to manage the migrant "surprise"	29
15	RT @freewiseguy: Did anyone notice violence against refugees? I only noticed it against Slovenians. Against second-class people. https://t.co/bPkemmnHUn	28
16	RT @JjansaSDS: @MiroCerar is responsible for the economic damage in border municipalities, who stupidly rejected the proposal of the RH for trains with refugees to run through Dobova.	28
17	RT @DamirCrncec: Now that GER has closed borders for illegal migrants, there is no target country anymore. This means that they will stay between TUR and Austria. What does this mean for SLO?	26
18	RT @vladaRS: In the last week, 47,510 migrants or #begunci arrived in Slovenia, 45% are women and minors, 55% Syrians, 25% Afghan. https://t...	25
19	RT @juretepinia: Croatia is playing a very dirty game. It stops trains far before the border and lets immigrants cross the border uncontrollably. This is how smugglers do it.	25
20	RT @borutmekina: @MiroCerar The night is coming. The children are getting sleepy. #begunci http://t.co/U03jaV0ZcF	24
	Total	653

external sites, aiming at maximising user retention on the platform. This strategy could explain why the most retweeted tweets predominantly lack URL links to external content.

Despite the less evident connection between mass media and Twitter concerning the most active users and URL links, the relationship observed with the most influential users and the discourse of the most retweeted tweets still underscores the significant role mass media plays in shaping the Twitter agenda on the migration debate. The following sections provide a more detailed interpretation of these results, first examining the impact at the user level and then delving into the discourse dynamics of the most retweeted tweets.

Building on the critical Internet perspective outlined in the theoretical section of our article, we argue that the dominance of “older” mass media actors predating Twitter’s emergence—such as 24ur.com, Delo, and Večer newspapers—can be explained through Herman & Chomsky’s framework (2002, xvi). They posit that the most successful media actors online were already successful before the advent of the Internet, attributing this success to substantial economic capital and large pre-existing audiences that facilitated their effective transition into the digital media sphere. Consequently, these “older” media actors rank among the most influential users on Twitter. However, the significant presence of right-leaning media such as *Nova24TV* and *Domovina*, established concurrently with the migrant “crisis”, cannot be explained by the same factors as they were not previously present in the Slovenian media sphere. We believe that their influence stems from strategic Twitter utilisation. According to Amon Prodnik (2016, 152), Slovenian political parties such as SDP trained members to use social media to promote the party’s agenda. As both mass media (particularly *Nova24TV*) support the SDP’s agenda, it is reasonable to speculate that their tweets were extensively retweeted by party members and other supporters. This explains both their influential position and the dominance of right-leaning SDP-affiliated politicians in our study.

With regard to the discourses of the most retweeted tweets, it is important to note that the occurrence of security discourse in the Slovenian migration debate on Twitter in 2015 mirrors broader trends in public’s perception of migration in Slovenia. Notably, Malešič (2017) discovered through an analysis of Slovenian public opinion data that concerns over migration as a security issue surged among the Slovenian public when the SDP, known for its strong security-focused stance on migration, gained considerable support compared to other Slovenian political parties. Our research corroborates these findings, demonstrating that SDP politicians

were pivotal in shaping the Slovenian Twitter migration debate. Additionally, the most influential Twitter users were predominantly right-wing mass media, promoting a security-focused perspective on migration. Moreover, as the perception of migration as a security issue prevailed among the Slovenian public, this viewpoint also laid the groundwork for legitimising various security policies and legislative measures implemented by the Slovenian government at the time, such as the erection of a razor-wire fence along the border (cf. Malešič, 2017).

To understand why the perception of migration as a security issue prevails both in the general Slovenian public and in our sample of retweets, it is necessary to compare the 2015–2016 migrant “crisis” with the first (1992–1993) and second (1999–2001) mass arrivals in Slovenia. The earlier periods were characterised by an ethno-nationalist framework that viewed Slovenia as a nation of citizens bound by blood and kinship (Mihelj, 2004). However, when analysing the top twenty retweeted tweets from the third period, it is challenging to identify a distinct ethno-nationalist tone; instead, a security-focused perspective on migration stands out. These differences in discourse can be attributed to the different socio-historical conditions prevailing at the time. The first and the second mass arrivals occurred before migration was widely regarded as a security issue. The global impact of events such as the 9/11 attacks has contributed to the shift towards viewing migration as a security concern (Bigo, 2005). It appears that right-wing actors in Slovenia have adopted discriminatory discursive practices prevalent worldwide, which have strengthened and spread after 2001, leading to the replacement of ethno-nationalist discourse with security discourse in the third period. However, this hypothesis is based on the prominence of security discourse and the absence of explicit ethno-nationalist discourse in our sample of the top twenty retweeted tweets. To determine whether security discourse has indeed replaced ethno-nationalist discourse in the third period, a comprehensive historical comparative analysis would be required, examining the role of security discourse during all three mass arrivals.

In conclusion, a hybrid approach to analysing Twitter has provided valuable insights by uncovering the mass media’s role in the migration debate through influential users and dominant discourses. Moreover, our study reveals how the Slovenian right promotes a security-focused migration discourse that is not authentically rooted in the Slovenian “national” understanding of migration, but was likely imported from abroad. Furthermore, the findings illuminate how the Slovenian right had skilfully appropriated the migration debate on Twitter as early as 2015. This likely indicates that

Slovenian right-wing actors recognised the importance of Twitter communication prior to Donald Trump's presidency, whose expert use of Twitter (cf. Chadwick, 2017) probably served as an inspiration for many like-minded allies around the world.

CONCLUSION

Our research into the role of mass media in shaping the Twitter agenda during the migrant "crisis" in Slovenia reveals that mass media play a significant role in setting the agenda within the Twitter migration debate. The analysis of the most influential users in this debate shows that mass media actors are prominently represented among these users. This group includes users associated with both "older" mass media, which existed before Twitter, and "newer" mass media, which emerged in the current hybrid media sphere. The majority of these mass media users can be categorised as having a right-wing political orientation. Moreover, right-wing politicians are also significant, ranking alongside mass media as the second most influential group. Thus, our data not only highlight the dominance of mass media in the Twitter migration debate but also the prevalence of a right-wing political network.

The influence of mass media on the structure of the migration debate on Twitter is also evident at the level of discourse analysis of the most retweeted tweets. In particular, the coexistence of security discourse with the humanitarian perception of mi-

gration indicates that the migration discourse on Twitter does not significantly diverge from the discourse prevalent in mass media. Furthermore, the emergence of security discourse in the Slovenian migration debate on Twitter in 2015 reflects broader trends in the public's perception of migration in Slovenia. This suggests that the migration agenda on Twitter aligns with the prevailing views on migration in the Slovenian public sphere.

Future research may investigate how mass media content is incorporated into the Twitter migration debate through hyperlinks. Considering the influence of mass media users revealed in our study, it is essential to conduct a URL link analysis (Pöyhtäri et al., 2021) on our current sample to better comprehend the role of mass media content. Additionally, a historical examination of security discourse during Slovenia's three mass arrivals could shed light on the specificities of migratory practises in different socio-historical contexts, particularly from the perspective of the ethno-nationalist discourse that was prominent during the country's first and second mass arrivals. Finally, researching Twitter's migration discourse from an intersectional perspective, particularly concerning the religious dimension (Jurekovič, 2018; 2020; 2023; 2024), is vital for future research, as the "Islam" identity (Mandelc & Gajić, 2022; Pušnik, 2017) is central to the formation of "otherness" in relation to an allegedly "European" identity (Ješe Perković, 2014).

KDO DOLOČA AGENDO V HIBRIDNI MEDIJSKI SFERI? VLOGA MNOŽIČNIH MEDIJEV V SLOVENSKI MIGRACIJSKI RAZPRAVI NA TWITTERJU (X)

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POVZETEK

Medijska sfera je v zadnjih desetletjih doživela številne tehnološke in družbene spremembe. Eden od pristopov, ki celovito zajame te spremembe, je model hibridnega medijskega sistema, ki predpostavlja hkratno proučevanje »starejših« in »novejših« medijskih institucij, praks in vsebin. Ta model je izhodišče naše raziskave, v kateri smo proučevali vlogo množičnih medijev pri konstrukciji agende na Twitterju (danes X) v obdobju migrantske »krize« v Sloveniji. Naša analiza je razkrila, da so med najvplivnejšimi uporabniki prevladovali akterji, povezani s »starejšimi« in »novejšimi« množičnimi mediji, s pretežno desno politično usmeritvijo. Poleg predstavnikov množičnih medijev so bili med najvplivnejšimi uporabniki tudi predstavniki desničarskega političnega omrežja. Na ravni analize diskurza najbolj retvitanih tvitov smo ugotovili soobstoj varnostnega in humanitarnega razumevanja migracij. Navedena ugotovitev nakazuje, da se prevladujoči migracijski diskurzi na Twitterju niso bistveno razlikovali od tistih, ki so bili običajno prisotni v množičnih medijih. Obstoj varnostnega diskurza v razpravi kaže tudi na to, da je slovenska migracijska razprava na Twitterju v letu 2015 odražala širše trende v javnem dojemanju migracij v Sloveniji. Osrednji prispevek naše raziskave je, da pokažemo, kako model hibridnega medijskega sistema, teorija prednostnega tematiziranja in teorija omrežij tvorijo koherenten pristop za proučevanje digitalnih medijev, s poudarkom na operacionalizaciji hibridnosti in vpliva v sodobni digitalni medijski sferi. Metodološki prispevek pa je v tem, da ponazorimo, kako je mogoče veliko količino podatkov (ang. big data) analizirati s kvalitativnimi metodami, konkretno s kritičnimi študijami diskurza.

Ključne besede: migrantska »kriza«, Twitter (X), množični mediji, hibridni medijski sistem, varnostni diskurz, politični akterji, desnica

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received: 2023-07-26

DOI 10.19233/ASHS.2024.33

GLOBAL CHRISTIANITY ANTE PORTAS: REVERSE MISSION AND THE CLASHING CONCEPTUALISATIONS OF RELIGION

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ABSTRACT

Christianity's centre of gravity has moved south, giving rise to the phenomenon of Global Christianity. This has in turn enabled the phenomenon of the reverse mission. Largely a missionary concept, reverse mission loosely refers to the conscious attempts by Global South churches to re-evangelise Europe. In any event, reverse missions have not been successful in converting non-immigrant Europeans. This paper analyses and reflects upon missionary and theological writings on these failures. Analysing the clashing Christianities, we pinpoint the religious body as an overlooked dimension of reverse mission failures. It is thus shown that the clash of Christianities reveals the clash of culturally specific conceptions of religion.

Key words: religion, migration, Global Christianity, Charismatic Christianity, reverse mission, body, sociology of religion

CRISTIANESIMO GLOBALE ANTE PORTAS: MISSIONE INVERSA E LO SCONTRO TRA CONCEZIONI DI RELIGIONE

SINTESI

Il centro di gravità del cristianesimo si è spostato verso sud, dando origine al fenomeno del cristianesimo globale. Questo ha permesso a sua volta lo sviluppo del fenomeno della missione inversa. Prevalentemente un concetto missionario, la missione inversa si riferisce approssimativamente ai tentativi consapevoli delle chiese del Sud globale di rievangelizzare l'Europa. Tuttavia, le missioni inverse non hanno avuto successo nel convertire gli europei non immigrati. Questo articolo analizza le riflessioni missionarie e teologiche di questi fallimenti. Analizzando lo scontro tra cristianità diverse, individuiamo nella corporeità religiosa una dimensione trascurata dei fallimenti della missione inversa. Così, mostriamo che lo scontro tra cristianità rivela uno scontro tra concezioni culturali specifiche della religione.

Parole chiave: religione, migrazione del cristianesimo globale, cristianesimo carismatico, missione inversa, corpo, sociologia della religione

INTRODUCTION¹

Scientific literature on migration primarily discusses the topics of securitisation (Kaya, 2009), integration (Norris & Inglehart, 2012), citizenship (Kofman, 2006), media discourses (Srnđelj & Vogrinc, 2020; Srnđelj, 2021) along with the topic of the intersectionality of migration, media and sexual minorities (Srnđelj et al., 2021). While most researchers have focused on migrating *Muslims* (Tausch, 2019) – only rarely do social scientific researchers specifically consider *Christian* migrants settling in Europe. We intend to productively contribute to these rare studies with the analysis presented in this article.

The gravitational centre of Christianity has shifted southwards in recent decades (Johnson & Ross, 2009, 58–65). At the beginning of the 20th century, North America and Europe were centres of Christianity in demographic terms – over 80 percent of all Christians were living there. Nevertheless, one century later, the proportion of all Christians living in the Global North has plummeted to below 40 percent – with the majority of Christians now living in sub-Saharan Africa, Asia, and Latin America (Johnson & Ross, 2009, 8). The social scientific and theological literature has dubbed this phenomenon Global Christianity (Jenkins, 2010). The latter suggests a number of societal ramifications – including the emergence of the “reverse mission” (Burgess, 2011), a contentious concept (Morier-Genoud, 2018) that we examine below. For the time being, it suffices to say that as a social scientific concept reverse mission seeks to describe the attempts by non-European churches to re-evangelise “native Europe”,² “importing” characteristics of Global Christianity.

The goal of this article is to reflect on the clashing conceptualisations of what Christianity, and hence religion, is. This will be done in three steps. First, we want to critically define the reverse mission notion because it is rarely discussed in social scientific terms, especially in Slovenia. Second, we wish to place the reverse mission movement within the larger framework of charismatic Christianity. Since the Nigerian Redeemed Christian Church of God (RCCG) is a major influence behind reverse mission efforts in Europe, we pay special attention to this church, namely one of the best known charismatic Christian denominations in the world (Burgess et al., 2010). Third, while we refer to a few self-reported reverse mission obstacles, our main emphasis is given to the challenges associated with conveying the particular religious practice that characterises Charismatic

Christianity. By conducting a sociological examination of these works, we aim to shed light on the conflicting Christianities and show how the findings could contribute to the development of theoretical conceptualisations of religion in the social sciences. Finally, we briefly discuss the study’s limitation before offering potential directions for future research.

The first two sections employ a methodological approach that entails a critical evaluation of relevant scientific and theological literature pertaining to the issue under study. The article’s central focus occupies the last two sections and addresses the problem of clashing conceptualisations of religion as derived from, first, a review and, second, a content analysis of theological and missionary materials (Nuendorf, 2002; Nelson & Woods, 2011). These writings take the shape of personal informal blog postings, media appearances and (theological) scholarly studies and presentations, which serve as fruitful objects of sociological study. To the best of our knowledge, we selected the most relevant material that was then critically examined from a sociological point of view in light of the paucity of such missionary and theological publications. Material pertaining to the Catholic Church was excluded from our research due to evident doctrinal and practical differences and we instead concentrated on protestant reverse mission endeavours. Moreover, all writings under consideration pertain to reverse mission operations in Europe, with a further focus on the United Kingdom. Language barriers meant that we focused solely on African reverse mission activities in Europe, excluding Korean (Kim, 2016) or South American ones (Oro, 2014), for example. In summary, the writings in our sample are by Protestant African theologians or missionaries offering their perspectives on the challenges of the reverse mission in Europe.

TOWARDS REVERSE MISSION AS A SOCIAL SCIENTIFIC CONCEPT

Even though research into reverse missions has grown considerably since the 1990s, it remains limited. Despite the fact that both theologians and social scientists have addressed the subject, reverse mission has been imbued with explicit theological and missionary connotations (Burgess, 2011, 432; Newbigin, 1987). From a social scientific vantage point, this holds two major implications. First, reverse mission is essentially a theological, actor-based, first-order concept, which means that it should not be blindly adopted as

1 The research for this article was made possible by the research programme “Problems of Autonomy and Identities at the Time of Globalisation” (P6-0194) and the training of Junior Researchers. Both are funded by the Slovenian Research Agency (ARIS).

2 In this paper, we understand native Europeans as non-migrant population born in Europe, independently of a person’s parent’s country of birth, their ethnic or racial background. We realise that this might not be the most conventional definition (albeit definitions of migrants vary; cf. Anderson & Blinder, 2015), but we believe it is useful for our study as we wish to emphasise the differences in success when it comes to reverse mission activities among migrant and non-migrant European populations. This will be made clearer below. In addition, studies of reverse mission typically simply sidestep this issue by speaking of “Europeans” (cf. Währisch-Oblau, 2009).

a scientific concept (Morier-Genoud, 2018). Second, rather than being taken for granted, the missionary and theological literature on reverse mission should be treated as an object of scientific discussion.

From a theological standpoint, the reverse mission is framed in both geographical and theological terms. For example, in an oft-cited definition, Matthews Ojo defines the reverse mission as the “sending of missionaries to Europe and North America by churches and Christians from the non-Western world, particularly Africa, Asia and Latin America, which were at the receiving end of Catholic and Protestant mission as mission field from the sixteenth to the later twentieth century” (Ojo, 2007, 380). Similarly, according to the theologian Israel Olofinjana, “African Christians ministering in the UK are now directly or indirectly a harvest of seeds sown by the early missionaries to Africa” (Olofinjana, 2010, 2). There is namely a direct lineage between the two types of mission, with the target audience of the contemporary reverse mission being “post-Christian Europeans or those who are not members of the church” (Noort, 2011, 12). In this article, the target audience of reverse mission efforts are “native Europeans”, with a general Christian background, whether active or passive.

Jehu Hanciles, a scholar of Global Christianity, identifies two historic factors that have contributed to the reverse mission’s emergence: first, the above-mentioned shift in Christianity’s centre of gravity southwards and, second, the increase in migrations to the Western world (Hanciles, 2008, 178–179). The latter bears a significant social component: the reverse mission is undertaken by economically and politically disadvantaged African migrants. To these, the sociologist Paul Freston adds two religion-specific factors: the worldwide expansion of Protestantism, which is mainly Pentecostal; and, second, the perception of Europe as being “religiously unique” (Freston, 2010, 154). While the first factor is elaborated upon below, it is worth remembering that the article addresses the *Protestant* reverse mission. The ecclesial differences are important in this regard: while Catholic African Christians do migrate to Europe with a missionary zeal, this can only be realised within any given national Catholic Church (Kwiyani, 2014, 123–128). Protestant churches, on the other hand, may be established by anyone, enabling easier evangelisation (Ekué, 2009, 391–392).

In any case, the reverse mission remains under-defined as a social scientific concept. As previously stated, missionaries and theologians concur on two key dimensions: the reversal in the direction of missionary-sending and the reversed direction of “colonization” (Freston, 2010, 155). Beyond this, the usage is ambiguous – in terms of both the intended audience as well as

missionary-sending and -receiving countries. Freston asks: “If reverse mission is to the former colonizer, does that include American or Australian missionaries in the UK? [...] If, however, reverse mission is to the former evangelizers, does that exclude Eastern European countries that never engaged in missionizing in the global south?” (Freston, 2010, 156). He continues by questioning the focus on ethnicity: “If ‘black-to-white’, that would rule out Asians and most Latin Americans. It seems there has to be [...] a ‘world turned upside down’, for there to be reverse mission. But what is included in this ‘inverted order’? Is it relative poverty, or colonial history, or skin colour?” (Freston, 2010, 156). In sum, as a social science concept, reverse mission is largely inaccurate due to its naive adoption from missionary terminology. This is especially problematic if the reverse mission is understood as a “discourse on reality” with which migration, evangelisation and “what is proper Christianity theology and praxis” are debated (Morier-Genoud, 2018, 185). Social scientific research has accordingly become more aligned with “the interests of certain actors in the religious field” (Morier-Genoud, 2018, 185), failing to adequately address the core of the concept. In other words: analytical precision is lacking when it comes to use of the term reverse mission.

Although a comprehensive conceptual discussion lies beyond the scope of this article, we acknowledge the validity of such concerns. It is nonetheless a fact that churches from the Global South continue to send missionaries to convert Europe. The reverse mission is not merely a discourse, even though it may more accurately describe *intentions* – not results. Given that systematic social scientific research on the reverse mission is scarce, for the sake of this article we define it as follows: The term “reverse mission” refers to protestant African missionaries’ deliberate efforts to convert Europe’s non-immigrant populace to Charismatic Christianity.³

REVERSE MISSION AND CHARISMATIC CHRISTIANITY

The topic of reverse mission is inextricably linked to the emergence of Charismatic Christianity in the Global South. Harvey Kwiyani, a missionary and theologian, identifies four strands of African immigrant Christianity engaged in reverse mission endeavours in Europe (2012, 110–134). Among the four streams, according to Kwiyani, “the largest group consists of Pentecostal and charismatic Christians” (Kwiyani, 2012, 110). This claim is corroborated by other missionary and scientific literature (Burgess, 2020; Hanciles, 2008; Asamoah-Gyadu & Ludwig, 2011; Asamoah-Gyadu, 2012).

³ In this case, Protestant churches also include AICs – African Initiated Churches or African Instituted Churches (Kwiyani, 2014, 128–132). We shall focus on the African reverse mission as it is both the most numerous and most researched reverse mission in Europe.

Charismatic Christianity is hard to define, with no agreed scientific definition of the concept existing (Anderson, 2010, 13–15). Further, scholars do not agree on the term itself – some authors insist on referring to it as Pentecostalism, Pentecostal-Charismatic Christianity, or Pentecostal/Charismatic Christianity. We find the label Charismatic Christianity to be the least problematic and use it as an umbrella term to refer to three types of Charismatic and Pentecostal communities or waves.⁴ First, there is Pentecostalism, a protestant movement, usually traced to the Azusa Street Revival in Los Angeles in 1906. Second, the ‘Pentecostalisation’ of traditional Christian churches gave rise to the Charismatic renewal of the Catholic, Orthodox, and other protestant churches, too (Gooren, 2010). Pentecostalisation implies the gradual transfer of certain doctrinal and, especially, worshiping aspects, characteristic of Pentecostalism. Finally, there are neocharismatic communities, which in terms of organisational structure are not tied to either the protestant Pentecostal or any other historical Christian church (Anderson, 2010, 22–23). Some researchers additionally state that the key characteristic of neocharismatic churches is the propagation of prosperity gospel (Garrard-Burnett, 2012). All three types or waves of Christian Charismatic share a certain theological emphasis on the workings of the Holy Spirit, manifested through ‘gifts of the Spirit’ (or *charismata* in Greek). The most frequent gift is speaking in tongues, while others include faith healing, vision, and prophecy.⁵

The exact number of Charismatic Christians is difficult to determine. Scientific estimates range from nearly one-quarter of all Christians (Anderson, 2014, 307), or about 1 billion of people, to roughly 680 million adherents or 27 percent of all Christians according to the latest estimates (Pew Research Center, 2011). In any event, it is considered to be the fastest-growing religious movement in history (Berger, 2014, 24). Charismatic Christianity is predominantly a religion of the Global South and of social deprived peoples. Thus, it is not surprising that the majority of scientific work has concentrated on themes of material deprivations (Chesnut, 1997; Willems, 1967) and theories of a contemporary elective affinity of Charismatic Christianity with capitalist modernisation (Barker, 2007; Hollenweger, 1984). Still, owing to advances in the cognitive science of embodied religion (Soliman et al., 2015, 854) and the material turn in religious studies (Hazard, 2013), scholars have lately started to pay greater attention to the *experiential* nature of Charismatic Christianity.⁶ Propelled by the rejection of the protestant bias (Meyer

& Houtman, 2012), a theoretical tendency to see religious beliefs as primary and religious rituals as mere expressions of those beliefs, such studies demonstrate that being a Charismatic Christian entails cultivating a specific body logic (Brahinsky, 2012) or adhering to a kind of bodily regime (de Witte, 2011, 497). According to the anthropologist Marleen de Witte, the charismatic bodily regime “values expressive, emotional modes of worship”; it is a regime that “authenticates the body as a primary medium of interaction with the spirit world” (de Witte, 2011, 497). Further, de Witte, who studied African Pentecostalism, goes on to describe how such corporeal, sensual regimes are “remarkably close to models of religious transformation in African traditional practice” (de Witte, 2011, 497). Josh Brahinsky, an American anthropologist, came to similar conclusions while studying American Christian Charismatics, stressing the cultivation of a distinct sensorium, a specific body logic (Brahinsky, 2012, 217).

This particular *bodyness* of Charismatic Christianity is what sociologist Manuel Vásquez sees as the key explanation for its portability in the transnational mission field (Vásquez, 2009, 275–278). Vásquez (2009, 276) conceptualised the doctrinal construction of the Charismatic bodyness as pneumatic materialism. The concept encompasses those forms of Christianity that “make the Holy Spirit central to the experience of sacred” (Vásquez, 2009, 276),⁷ demonstrating that African Charismatic Christianity is “thoroughly materialist in a sense that they reject the European, Cartesian dichotomy between soul and body and the denigration of the latter” (Vásquez, 2009, 276). As a result, the traditional sociological Durkheimian definition of religion does not apply to Charismatic Christianity – there is no clear boundary between the sacred and profane, between the supernatural and the natural. As Vásquez (2009, 276) puts it: “Spirit and flesh are constitutively intertwined, as are transcendence and immanence”. This point holds significant implications and will become relevant for the proceeding discussion. Yet, for now, it suffices to acknowledge that the Charismatic Christianity, brought to Europe by African immigrants, is an especially *experiential* form of Christianity that calls for a believer to accept a particular body logic (Brahinsky, 2012) – rather than to adhere to carefully thought-out theological propositions.

Before continuing, we briefly present the reverse mission activities of African Charismatic Christian churches in the Global North by focusing on the Nigerian Redeemed Christian Church of God (RCCG), the biggest Nigerian Christian Charismatic church (Adeboye, 2007).

4 The terminology of waves should not make us think that these communities do not coexist spatially and temporarily.

5 For a detailed introduction to Charismatic Christianity, cf. Anderson (2014).

6 This was originally proposed, although only briefly, by one of the pioneering studies of Pentecostalism in Latin America. David Martin wrote in *Tongues of Fire* (1990) how a particularly bodily experience of the sacred might be more important to the Pentecostals rather than the correct “grammar of faith” (Martin, 1990, 52).

7 The Greek word *pneuma* literally means “breath”, while when used in the context of Christianity it usually refers to the (Holy) Spirit.

THE REDEEMED CHRISTIAN CHURCH OF GOD

The RCCG is a useful example of a reverse mission, especially due to its popularity, which gave rise to several theological (Kwiyani, 2014, 115–117) and social scientific analyses (Adeboye, 2007; Burgess et al., 2010; Burgess, 2011) that prove beneficial in our case. The Redeemed Christian Church of God traces⁸ its beginnings to Josiah Akindayomi, a Yoruba farmer born in 1909. At first, he was converted by the Anglican Church Missionary Society, but subsequently became a prophet of the Cherubim and Seraphim church, one of the first Aladura churches in Nigeria (Adeboye, 2007, 31–36). In 1952, he founded a new church – the RCCG – after he had received a ‘divine revelation’. Establishing a covenant with God, Akindayomi was promised that the church would “spread to the ends of earth before the Second Coming of Christ” (Burgess et al., 2010, 101). The worldwide expansion of the RCCG is thus incorporated into the very foundation of the church.

The following history of the church can be divided into two phases (Adeboye, 2007, 36–48; Burgess et al., 2010, 101–103). The first phase (1952–1980) was marked by a traditional Pentecostal anti-materialistic lifestyle, strict dress codes and worshiping services, which were mainly conducted in Yoruba (Burgess et al., 2010, 101). Up until his death in 1980, Akindayomi managed to establish 39 branches with membership of up to 1,000. The churches were mostly located in southwestern Nigeria – none were present in any other country (Burgess et al., 2010). The accession of Akindayomi’s successor, Enoch Adejare Adeboye, marks a major turning point in the RCCG’s history. The ensuing global expansion was rapid. Relaxing some of the moral rules, he nevertheless stuck to the holiness doctrine, while emphasising prosperity theology and the power of miracles (Ukah, 2008). By adopting prosperity theology, he brought the church in line with the worldwide Charismatic trend that highlighted health and wealth (Coleman, 2000). Moreover, theirs is a “holistic concept of salvation” (Burgess, 2020, 255), which included emphasis not only on prosperity, but on healing and holiness as well. As Burgess notes, the appeal of these theologies is clear in a precarious economic environment like sub-Saharan Africa where “access to medical facilities and to state funds is severely restricted” (ibid.). A new model of parish system aimed at attracting “young, urban professionals” was vital for the national and, eventually, transnational expansion (Burgess et al., 2010, 102). Today, the RCCG is the biggest Pentecostal church in Nigeria – one of its megachurches, an auditorium at the Redemption camp near Lagos, can accommodate up to 3 million worshippers. The RCCG is also among the biggest Charismatic churches in the world – including Europe (Burgess et al., 2010).

The church is heavily involved in reverse mission. Although there are RCCG churches in North America (Jemirade, 2017), the main thrust of its reverse mission activities is in Europe, notably in the United Kingdom, the Netherlands and Germany (Burgess et al., 2010, 103). The RCCG’s mission policy (2018) states that the church’s vision is “to spread the Word to the Ends of the Earth” (RCCG, 2018, 1), an ambition that has existed ever since it was founded in 1952. The mission statement includes the intention “to make heaven; to take as many people as possible with us; to have a member of RCCG in every family in all nations”, adding that, in order to accomplish the first goal, “holiness will be our lifestyle” (RCCG, 2018, 1). While the latter is certainly pertinent for our discussion that follows, here we wish to focus on the missionary zeal of the RCCG. The mission statement also says that the RCCG “will plant churches within five minutes walking distance in every city and towns of *developing* countries and within every five minutes driving distance in every city and town of *developed* countries” (RCCG, 2018, 2; emphasis added). In this respect, the RCCG prides itself on having 35,000 parishes around the world and a presence in 197 countries. The document goes on to explain the role of the missionary, the missionary strategy, the organisation’s structure, and the emphasis of Christian social responsibility. The RCCG’s policy on the latter includes, among others, the following activities: leadership training; family, marriage, and juvenile counselling; food banks and the provision of clothes, shoes and hats; cultural integration activities and prison evangelism (RCCG, 2018, 11). Although this is considered in the next chapter, it must be noted that evangelism is important in terms of measuring the effectiveness of the reverse mission (Burgess et al., 2010; Olofinjana, 2019, 7–8).

It would be an understatement to describe the RCCG’s mission in Europe as well-organised. According to the official website of the RCCG’s mission in Europe (the RCCG’s “Europe Mainland Mission” or EMM), the organisation was established in 2002 with “only a few parishes in five countries” (RCCC EMM, 2023). However, today the European Mainland Mission (EMM) covers 46 countries – including over 230 parishes – excluding the United Kingdom. The website states that for administrative purpose the EMM is further divided into three regions (RCCG EMM, 2023). Region 1, overseen by pastor Dele Olowu, is further divided into five provinces, each overseen by a separate pastor. The website provides a detailed structure of provinces and parishes in Region 1 (RCCG EMM, 2023). The countries included in Region 1 include France and Benelux countries

8 Here we briefly sketch out the RCCG. For a more detailed analysis of its history and its present condition, cf. Adeboye (2007); Burgess et al. (2010); Ukah (2008).

together with Central European countries and ex-Yugoslav republics, including Slovenia (RCCG 2020). According to the document, there were 89 parishes in Region 1 in 2020, with Austria (13) having the highest number of parishes. Interestingly, the document claims that there is at least one parish in Slovenia (RCCG, 2020). Region 2 of the EMM is overseen by pastor Leke Sanusi, a barrister and solicitor, living in Kent in the United Kingdom (RCCG EMM 2023). Region 2 includes 17 countries,⁹ including most of the countries from Portugal across to Georgia, skipping over Eastern European republics. Finally, Region 3 of EMM includes Scandinavian and Eastern European countries as well as the Baltic republics. Region 3¹⁰ is led by pastor David Sola Oludoyi, a “qualified medical doctor” living in the UK (RCCG EMM, 2023).

The impressive administrative structure aside,¹¹ the question is whether the RCCG – as well as other Charismatic churches – has been successful in its bid to convert Europe using the ways of African Charismatic Christianity.

IS EUROPE BEING CONVERTED?

“Out of the spotlight, an extraordinary re-evangelisation of Europe is taking place!” claimed an article posted on the official website of the Lausanne Movement (Memory, 2021). The latter is a platform that provides communicative tools and missionary resources for those actively involved in mission work across the world. While such enthusiasm is to be expected of a missionary organisation, one should not take its assertion for granted. Are reverse mission efforts truly effective in re-evangelising native Europeans?

The answer depends on how success is construed. If success is defined in a narrow sense, that is, in terms of converting native, non-immigrant Europeans, then the answer is a resounding No (Kwiyani, 2017; Ola, 2019; Währisch-Oblau, 2009).¹² Both social scientists

and missionaries agree on this point. For example, according to the Dutch scholar van der Laan, “the native Dutch [...] do not respond to their [reverse missionaries’] evangelistic efforts” (van der Laan, 2006, 55) and Währisch-Oblau says that “even large very international churches have relatively few German members” (Währisch-Oblau, 2008). Such churches are then referred to as migrant churches (Währisch-Oblau, 2009, 33–36), namely, “churches and congregations which have been founded by people with a recent migration background, are led by them and have a majority of members from such a background” (Währisch-Oblau, 2009, 36). As such, these churches – and reverse mission efforts in general – have been dubbed “asylum Christianity” (Ukah, 2009).

Yet, if we define reverse mission more broadly to encompass the general societal impact, then the reverse mission endeavours are becoming a definite “social force in Europe” (Burgess et al., 2010, 116). Based on research done on the RCCG in the UK, Germany and the Netherlands, Burgess and his colleagues concluded that the social impact may be observed on three levels (Burgess et al., 2010, 100–116): the social impact of religious organisations and individuals’ civic activities such as community health organisations, nurseries and food banks; the social impact of integration processes, which the RCCG encourages, influencing socio-economic mobility, guiding social interaction and motivating civic activity; and, finally, the de-privatisation of religion by appearing in the public eye through the use of media, religious events and recognition by the government.¹³ As an outcome, the RCCG constitutes “a challenge to the secularization thesis and the notion that religion is losing social significance for public and/or private life” (Burgess et al., 2010, 116).¹⁴

Putting these undoubtedly important impacts to one side, we are more interested in the narrow sense of reverse mission. In this light, it is appropriate to ask why reverse mission attempts have been unsuccessful.¹⁵ Missionary and social scientific literature

9 It is worth noting that the information provided by the official website is somewhat inaccurate. For example, the administrative Region 2 supposedly includes Serbia, Kosovo and Albania, yet these very countries are listed within Region 1 as well.

10 Here, too, there seems to be a mistake with Slovenia being named within this region as well as Region 1.

11 The RCCG’s mission in Europe includes the production and promotion of magazines and newspapers as well as an array of digital media platforms. In this respect, research of reverse mission should also consider the dynamics of digital media (Srnđelj & Pajnik, 2022) and cyber space (Lenarčič & Srnđelj, 2020).

12 One glaring exception is the Ukrainian church Embassy of the Blessed Kingdom of God for All Nations, which is led by its Nigerian founder Sunday Adelaja. The church is mainly attended by native Ukrainians. A discussion of its specifics is beyond the scope of this article. For a detailed discussion, cf. Asamoah-Gyadu (2006; 2010); Adogame (2008); Freston (2010, 167–170).

13 For example, the then prime minister of the UK, David Cameron, attended the RCCG’s Festival of Life in London in 2015 (The Guardian, 2015). Burgess and colleagues add that the then mayor of London, Boris Johnson, also visited Jesus House, an RCCG church in London, as did Prince (at the time) Charles (Burgess et al., 2010, 115).

14 This is not surprising given the afore-mentioned activities conducted within the RCCG’s mission efforts.

15 Understanding the obstacles to the reverse mission, theologians and missionaries form cross-denominational organisations seeking to aid such a mission. One such example is the Centre for Missionaries from the Majority World, which “aims to help British indigenous Christians and Churches and Majority World pastors and missionaries work together in mission” (Centre for Missionaries from the Majority World, 2023). Both Israel Olowule Olofinjana and Harvey Kwiyani, who we often cite, are members of this centre.

lists several reasons why Charismatic Christian churches from the Global South have not been successful in converting “the dark continent of Europe” (Olofinjana, 2010). From missionaries’ point of view, we may divide these into two categories: socio-demographic and theological, pertaining to religious practice. There are two major socio-demographic barriers to the reverse mission: the economic and political disadvantage of reverse missionaries and racial prejudice (Kwiyani, 2014, 175–185; Ola, 2019). Reverse missionaries come from politically and economically disadvantaged backgrounds, which means they lack immediate material resources to engage in missionary work. They are also frequently affected by immigration laws, with both pastors and members often facing deportation (Kwiyani, 2014, 183–184). This is of course interconnected with racial prejudice, as frequently faced by reverse missionaries. For example, Matthew Ashimolowo, the Nigerian leader of the Kingsway International Christian Centre, the UK’s biggest Pentecostal church, declared that “we are seen as a black thing and not a God thing” (cf. Jenkins, 2009, 89). Kwiyani describes his experience in such a way: “For most people in the West, even well-wishing Christian leaders, to be black is still to be suspicious. To be an African black is even worse” (Kwiyani, 2014, 175). He pessimistically adds “you can never belong [...] you have to be of the right colour, subscribe to the right theology, wear the right clothes, speak with the right accent” (Kwiyani, 2014, 175). Along these lines, the pioneer of Pentecostal studies, Walter Hollenweger, remarked: “Christians in Britain prayed for many years for revival, and when it came, they did not recognize it because it was black” (Hollenweger, 1992, ix).

In this paper, we focus on theological obstacles, which may loosely be described as “obstacles of contextualisation and they mainly point to the differences in religious practice” (Kwiyani, 2014, 175–182; Ola, 2019, 59–65; Olofinjana, 2010, 57). These refer to the “contextual ignorance” as reverse missionaries are “struggling to understand their context in order to formulate an intentional mission strategy and an ecclesiology that fits their situation” (Ola, 2019, 59). Contextual ignorance manifests itself in disagreements on what a ‘church’ or a ‘pastor’ should be (Ola, 2019; Währisch-Oblau, 2009) and discrepancies in “worldviews of the Western world and Africa” (Ola, 2019, 63). The latter include differing views on the role of women in church, and homosexuality (Verstraelen, 2007, 111). In addition, missionaries referring to witches, demons, end times and curses are considered as being “unpalatable to Europeans’ sensibilities” (de Oliveira, 2021, 3). In this regard, Dutch theologian Gerrit Noort underscored that one

of the challenges to the reverse mission is a “true dialogue with migrants’ theologies” (Noort, 2011, 13). According to him, anchored in “theological post-Enlightenment reductionism”, Dutch protestant churches have difficulty conversing with “the biographical and narrative theologies of many migrant Christians” (Noort, 2011, 14), who stress Pentecostal theologies of healing, for example. Dutch protestants view such theologies as “pre-Enlightenment”, as something “we believed in the fifties” (Noort, 2011, 14). Further, one of the major theological hurdles is prosperity theology, which is thought to be inappropriate in the relatively affluent societies of Europe (Olofinjana, 2010, 54–55).

Yet there is also a clash of *religious styles*, in particular, of the religious bodies. This is an aspect that social science literature only rarely picks up on, while missionary and theological reflections mention it more in passing. Nonetheless, they state that missionaries should “reduce noise levels” (Währisch-Oblau, 2009, 306) or minimise “lively expressions introduced into worship and meetings of European Christians” (Verstraelen, 2007, 110). Indeed, missionaries told Kwiyani that “it is too difficult to reach out to Europeans” because it “forces us to do things differently, and that is too uncomfortable” (Kwiyani, 2017, 45; emphasis added), such as having shorter and quieter worship services (Paas, 2015, 15), with less fervent and long-sustained prayer, which are dismissed as “extreme, unnecessary, and ‘African’” (Kwiyani, 2019, 87).¹⁶ In a similar spirit, Burgess quotes a missionary who claimed that to be an effective missionary in Britain, “you must de-robe yourself of your own culture” (Burgess, 2011, 443). According to Währisch-Oblau, the emphasis on charismatic worship (including the above-mentioned Charismatic body) does not lead to a revival, but to “embarrassment and anger” (Währisch-Oblau, 2009, 303), which explains why migrant pastors “tone down their message and manage without rituals that they know would be alienating” (Währisch-Oblau, 2009, 303). This is due to the fact that African Christianity, when brought to Europe, will, in Kwiyani’s view, “look and feel different from Western Christianity” (Kwiyani, 2014, 80; emphasis added). In the eyes of Westerners, this style of Christianity may appear “as an inferior type of Christianity compared to the Western Christianity” (Kwiyani, 2014, 107). We argue that it is this notion of *looking* and *feeling* different that is crucial in our further analysis since it refers to a different conceptualisation of the role of religious materiality. While European Christians see religious materiality – the use of bodies and music for instance – as expressions of something prior, not paying as much attention to it, the Christianity of the reverse mission appears to ascribe a high value to these aspects.

16 Note that these characteristics are key in cultivating the Charismatic bodily regime as explained above.

FROM CLASHING CHRISTIANITIES TO CLASHING
CONCEPTUALISATIONS OF RELIGION

Reflecting on the difficulties reverse missionaries face while attempting to evangelise Europe, Harvey Kwiyani speaks of a “clash of Christianities” (Kwiyani, 2014, 145). The latter is a concept used to describe the initial encounter of different *styles* of Christianity. In Christian missionary and theological literature, this type of collision is characterised as “the Ephesian moment”, a term coined by Andrew Walls (2002, 78). The Ephesian moment highlights the early church experience of Antioch, marked by a “social coming together of two or more different cultures to experience Christ” (Kwiyani, 2014, 85). Still, the theological notion of clashing¹⁷ Christianities should not simply be used by social actors, reflecting on their own experiences of reverse mission. We argue that the notion of clashing Christianities holds substantial implications on the levels of sociological theory and empirical research. In the paragraphs below, we claim that a culturally situated understanding of religion, derived from the milieu of Charismatic Christianity, yields a more analytically accurate concept of religion compared to traditional sociological concepts of religion.

It is generally accepted that (social) science cannot produce a pure, objective concept of a given (social) reality (Berger & Luckmann, 1988). Scientific concepts, especially those used within the social sciences, are social constructions – products of certain scientific paradigms (Kuhn, 1998) and thought collectives (Fleck, 2022). They may nonetheless be more or less effective in explaining (social) reality. The concept of religion is no exception. The modern concept of religion, marked by the protestant bias that privileges belief over religious materiality such as ritual (Muir, 1997, 147–228; Roper, 1994, 171–199), was forged in the theological and intellectual legacy of the Protestant Reformation (Keane, 2007, 84–97; Orsi, 2016, 12–47). While a comprehensive discussion is beyond the scope of this paper, it should be noted that the key feature of this process is the *somatophobic* inclinations which the concept was endowed with. The privileging of belief over matter was the result of the discursive symbolisation of religion. Coined by the sociologists Phillip Mellor and Chris Shilling (1997, 98), discursive symbolisation marks the radical Protestant transformation of the Christian God. No longer would it be immanent, available to one’s immediate senses; rather, the relationship between an individual believer and God was to be established

purely on the conscious reflexivity of that believer. In other words, in such a theological constellation, God was to become a transcendental entity, one in which a Christian *believes* in – only secondly do they *feel* it (Mellor & Shilling, 1997).¹⁸ This theological, social and intellectual milieu that gave rise to first scientific notions of religion, which posited the primacy of beliefs and subordinated religious materiality – objects, rituals, body postures – to the role of their manifestation (Keane, 2007, 84–97; Orsi, 2016, 25–37).

Such notions of religion persist today in terms of both a social consensus (Jureković, 2023, 40–46) and on the level of social scientific theory. The latter is best demonstrated by rational choice theories of religion, one of the most popular research programmes in sociology of religion. In terms of larger societal implications, the modern disenchantment gave rise to a certain type of embodiment (Mellor & Shilling, 1997, 4), which the philosopher Charles Taylor famously labelled the “buffered self” (Taylor, 2007, 27). Taylor went on to describe the overall effect of the Reformation as an increasing “excarnation, the transfer of religious life out of bodily forms of ritual, worship, practice so that it becomes more and more to reside ‘in the head’” (Taylor, 2007, 613). In a similar manner, Mellor and Shilling speak of a “protestant modern body” (Mellor & Shilling, 1997, 8). Such assessments point to the similar modern development of an embodiment that may be found in contemporary European societies.¹⁹ In essence, this type of embodiment is denoted by a high degree of rational control over one’s body and sensuality, a control forged through the historical civilising process, as described by the sociologist Norbert Elias (2000). Indeed, such embodiment goes hand in hand with the Cartesian subject distinguished by a fundamental split between mind and body (Vásquez, 2011, 36–41).

Returning to the topic of the reverse mission, it is precisely this type of Christianity – and societal form of embodiment – that contemporary African missionaries encounter in their efforts to re-evangelise Europe. As noted above, the Christianity they bring looks and feels different from the Western Christianity. This is why self-reflecting missionaries observe that one of the problems of African-led churches in Europe is the “importation of African Christianity without contextualisation [...] In essence: lack of indigenising Christianity amongst the British populace” (Olofinjana, 2010, 57). Such observations are not limited to the clashing religious beliefs or political views between Northern and Southern Christianity. Instead, they speak of the clashing place of religious

17 We do not wish to imply that this coming together of different kinds of Christianities is in any way violent. Still, we find it useful in this instance to follow first-order phrasing, as used by missionaries themselves (Kwiyani, 2014). In addition, as some missionaries report moments of embarrassment and anger, it seems worthwhile to think of this coming together as not too pleasant for either side.

18 This was famously described by Max Weber under the rubric of disenchantment (Weber, 2004, 30).

19 Although Mellor and Shilling speak of a “baroque modern body” while describing contemporary embodiment. The baroque modern body combines features of the “medieval body” and the “protestant modern body”. That is, the baroque modern body is marked by both high levels of modern rationality as well as a greater tendency for sensuous, bodily interactions (Mellor & Shilling, 1997, 161–189).

materiality – music, dancing, shouting – in Christianity itself, albeit that is not always explicit. For example, Kwiyani writes that the “African theology developed in a very spirit-oriented culture, where the *spirit and the material intertwine* on a regular basis” (Kwiyani, 2014, 180, emphasis added). For Kwiyani, the problem lies in the clash of Western theology, “influenced by science and reason” (Kwiyani, 2014), and African theology, marked by the “immediacy of the presence and power of the Spirit” (Kwiyani, 2014, 182). Namely, missionaries argue that there is a clash between European, non-charismatic religious expectations and African charismatic theology (Kwiyani, 2014). While we concur with the theological analysis, social scientists should look beyond theology as the barrier in itself. Rather, we are witnessing a clash between a non-charismatic and charismatic way of *doing* religion – it is not a doctrinal clash so much as a *practical* clash. It is in this light that we claim that social scientists should move beyond certain beliefs that may be hard to grasp for the secularised Europeans. That is, in this article we wish to move beyond obvious theological differences. It is not the secularised mind that is in the way – it is the secularisation of the body (Turner, 2008, 38).

Kwiyani explicitly states that the spirituality of the reverse mission is “holistic [...] a matter of mind and the heart” since it “involves the whole of the person’s being” (Kwiyani, 2014, 160). In this regard, African Christianity is thoroughly non-dualistic, understanding the negative impact of a “material-spiritual, holy-profane and religious-secular” perspective (Besha, 2021, 1). Thus, Kwiyani writes that “in celebration or in worship or any other religious activity, the participant’s *entire body* [...] engages in the process, *singing, dancing and more*” (Kwiyani, 2014, 160; emphasis added).²⁰ Namely, in Taylor’s terms, the African Charismatic Christianity is marked by the “porous self” (Taylor, 2007, 38). Describing European Christianity in a similar manner to the buffered self, Kwiyani states that “for the past 300 years, a strong cultural bias in Europe towards science, reason and logic created a *dualism that pits the material world that we see against the spiritual world*” (Kwiyani, 2019, 82; emphasis added). Further, reflecting on failures of the reverse mission, Kwiyani expressly discusses Taylor’s distinction between the buffered, European self and the porous self of the reverse-mission Christianity (Kwiyani, 2019, 83–85). This point also echoes Vásquez’s above-mentioned notion of pneumatic materialism.

It is not surprising that African Charismatic missionaries are able to identify the significance of religious materiality, notably the body, for their Christianity and as an obstacle in the re-evangelisation of native Europe. We also contend that it is just as unsurprising

that social scientists of religion rarely pay fair due to the religious materiality and its role in reverse mission attempts. Working within the above-described modern paradigm of religion, they regard the matter of beliefs (or worldviews) as primary reasons²¹ why African Christians are unable to convert native Europeans. In other words, beyond a clash of Christianities, there is a clashing conceptualisation of what religion is. In particular, it is a clashing conceptualisation of the role of religious materiality – especially the body – in the constitution of religion as a social phenomenon. Once researchers move beyond the modern, Protestant reduction of religion to belief, we can better appreciate religion as an embodied phenomenon – and study it accordingly.

One such researcher is the anthropologist Tanya Luhrmann who has done extensive work on Evangelical and Charismatic Christians (Luhrmann, 2020). Her work is based on a different assumption to those of traditional concepts of religion. Instead of seeing belief as primary and ritual (worship) as secondary, she asks “whether people believe *because* they worship” (Luhrmann, 2020, x; emphasis added). In her *How Gods Become Real* (2020), she focuses on acts of “real-making”, a concept through which she sees rituals as tools to “help people to shift from knowing in the abstract that the invisible other is real to *feeling* that gods and spirits are present in the moment” (Luhrmann, 2020, x). She adds that “the task of the person of faith is to believe not just that gods and spirits are there in some abstract way, like dark energy, but that these gods and spirits matter in the here and now” (Luhrmann, 2020, xi). We argue that the concept of real-making helps further understand the pitfalls of the reverse mission. Namely, the real-making includes “microprocesses of attention”, using the mind and body which “kindles the divine presence for a person of faith” (Luhrmann, 2020, xi). Importantly, Luhrmann notes that, first, these processes are *crucial* for any religion and, second, that these processes are socially shaped and locally specific. With this in mind, her basic claim is “that god or spirit – the invisible other – must be made real for people, and that this real-making changes those who do it” (Luhrmann, 2020, xii).

We contend that this is a useful way of sociologically thinking about the clash of Christianities in Europe. In essence, this clash constitutes a clash of different kinds of real-making, of different kinds of kindling events that are necessary for a given group of Christians. Generally speaking, one Christianity calls for the use of loud, fervent and long-lasting worshipping sessions, combined with a network of religious materiality, while the other prefers toned-down, calm reflections of faith. That is, we are witnessing a coming together of opposing religious body regimes – opposing constructions of the Christian

20 Using more plain language, Kwiyani says that the reverse mission will demand a conversion, however “not to a religion but to a *new way of life* under the lordship of Christ” (Kwiyani, 2019, 80; emphasis added).

21 Besides the undoubtedly important social issues of racism and xenophobia.

body. By this, we wish to emphasise that even though European, non-charismatic Christianity is marked by a distinct lack of expressive, intense body styles, this does not mean that the religious body of such Christianity does not play a role. One of the great discoveries of contemporary research on the cognitive study of embodied religion shows how – no matter the type of the religion – the body style plays a significant role in the forming of particular beliefs (Soliman et al., 2015). Namely: how we *do* religion is intrinsically linked to what we believe in. For example, the work of the psychologist Patty Van Cappellen and her colleagues reveals how particular body postures are characteristic for certain types of Western Christianities (Van Cappellen & Edwards, 2021a; 2021b; Van Cappellen et al., 2021). As we have seen above, Charismatic Christianity of any kind – but particularly so African – is denoted by distinct body logics or bodily regimes that require a reordering of one's sensuousness. This includes an interaction of many a religious materiality – worshiping music, singing, body movement, worshipping lighting. As we have seen from the missionary and theological reflections, these elements of African Christianity are often brought up as obstacles to evangelisation campaigns in Europe.

Paying attention to the struggles of the reverse mission and of the clashing Christianities, social scientists of religion have much to learn about their own theoretical and analytical tools. We believe that studying the self-perception of (African) Charismatic Christians and their view of Christianity and reverse mission struggles can help sharpen the core concepts of our scientific endeavours. As we noted – there is no *pure* social scientific concept. Still, this does not mean that such concepts are all equally lacking in analytical thrust. We have shown that scholarly dependence on the modern concept of religion blinds researchers from the vital role that religious materiality might play in attempting to explain reverse mission failures.

CONCLUSION

Reverse mission is a concept used by both theologians, missionaries as well as by the social scientific community. It principally describes the aspirations of missionaries and theologians who wish to re-evangelise Europe by means of Global Christianity, in particular, Charismatic Christianity. It is, as Burgess points out, a category of *empowerment* for non-Western Christians (Burgess et al., 2010, 153). Following from this, and in terms of social scientific approaches, reverse mission is chiefly a first-order discourse used to “discuss issues of

migration the evangelisation work of foreigner Christians, and what is proper Christian theology and praxis” (Morier-Genoud, 2018, 185). That is, reverse mission is a discourse that, on the ground, primarily describes those migrant churches that have become migrant sanctuaries (Adedibu, 2013). Nevertheless, reverse mission does describe the genuine attempts of African Charismatic churches to re-evangelise Europe – however successful they might be.

The key question considered in this article is why African Charismatic Christians have been unsuccessful in converting native Europeans. Although obstacles that missionaries themselves report include social characteristics and theological particularities, we sought to shed light on the religious materiality that may be hindering the re-evangelisation of Europe. While thinly veiled racism as well as doctrinal differences no doubt play an important role, the core argument is that empirical research must focus more on religious *doing*. In particular, we believe that the religious body, as constructed by African Charismatic Christians, plays a vital role as a barrier to an effective reverse mission. In effect, the clash of Christianities is a clash of competing body regimes. As we have shown, the clashing religious styles – including ‘inappropriate’ loud music, dancing, shouting – is something that is self-reported by missionaries themselves, yet missing from the social scientific reflections on reverse mission.

We believe that taking the religious body into account while approaching the topic of reverse mission is not an end goal in itself. Instead, paying close attention to the missionary reflections enables social science researchers to rethink their core concept – religion. Even though religion has traditionally been thought of as mostly a matter of belief, which was then manifested through religious rituals conducted by religious communities (or privately), contemporary research in cognitive and social science is pushing us towards a new conceptualisation of religion. While the traditional concept of religion rested upon a particular European, Protestant basis, contemporary conceptualisations might be more in line with the Charismatic understanding of religion. Hence, the clash of Christianities convincingly shows the clash of competing social-scientific definitions of religion, showcasing the cultural specifics of defining the core concept of religious studies. Nevertheless, we wish to acknowledge the limitations of our research. We propose a theoretical reorientation, based on the analysis of theological and missionary writings. Although valid, such an approach requires further testing in terms of thorough fieldwork.

GLOBALNO KRŠČANSTVO ANTE PORTAS: POVRATNI MISIJON IN TRK
KONCEPTUALIZACIJ RELIGIJE

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POVZETEK

Gravitacijsko središče krščanstva se je prestavilo na globalni jug, kar je privedlo do pojava tako imenovanega globalnega krščanstva. Slednje nosi številne posledice, med katerimi najdemo tudi pojav tako imenovanega povratnega misijona, kateremu se posvečamo v besedilu. Povratni misijon predstavlja teološki ter misijonarski koncept, ki opisuje prizadevanja neevropskih, krščanskih cerkva za novo evangelizacijo Evrope. Večina teh cerkva je protestantskih, ter sodi v karizmatično krščanstvo, za katerega je značilna določena religijska telesnost. Navkljub misijonarskim prizadevanjem, tako teološka kakor tudi družboslovna literature ugotavljata, da je povratno misijonarstvo neuspešno pri spreobračanju nepriseljnih Evropejcev. V prispevku se osredotočamo na vzroke, ki jih izpostavljajo raziskovalci ter misijonarji. Oboji med razloge za neuspešnost povratnega misijona uvrščajo rasizem, šibek družbeno-ekonomski položaj misijonarjev ter nasprotja v doktrinarnih prepričanjih. Toda misijonarji k razlogom pogosteje prištevajo tudi poudarjene značilnosti religijske telesnosti, ki naj bi jo Evropejci težje sprejeli. To opažanje predstavlja ključni predmet analize tega prispevka. Pokažemo, da tako imenovani trk krščanstev ni zgolj trk različnih doktrinarnih prepričanj, temveč je predvsem trk različnih opredelitev religijskega telesa. Trdimo, da ima to opažanje pomembne posledice za sociologijo religije, saj je moderni koncept religije nastal v kulturno-religijskem okolju, ki je religijsko materialnost postavljal v podrejen položaj v odnosu z religijsko idejnostjo. Globalno, karizmatično krščanstvo, ki ga misijonarji povratnih misijonov prinašajo v Evropo, je v trku ravno s tovrstnim razumevanjem krščanstva – in religije. Pokažemo, da bi koncept religije, izpeljan iz karizmatičnega razumevanja krščanstva, lahko natančneje pojasnil težave povratnega misijona.

Ključne besede: religija, migracije, globalno krščanstvo, karizmatično krščanstvo, povratni misijon, telo, sociologija religije

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received: 2023-11-23

DOI 10.19233/ASHS.2024.34

DVAJSET LET DELOVANJA SVETOV IN PREDSTAVNIKOV SLOVENSKE NARODNE MANJŠINE NA HRVAŠKEM

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IZVLEČEK

Prispevek prikazuje delovanje predstavnikov in svetov slovenske narodne manjšine na Hrvaškem, ki bi lahko imeli pomembno vlogo v povezovanju pripadnikov slovenske skupnosti z lokalno oblastjo. Prispevek temelji na podatkih, pridobljenih z analizo uradnih dokumentov Vlade Republike Hrvaške in objav v manjšinskih medijih. Izvedena raziskava in analiza pridobljenih podatkov o aktivnostih pripadnikov slovenske skupnosti v delovanju svetov in predstavnikov slovenske manjšine na Hrvaškem kaže, da aktivni člani delujejo predvsem na področju ohranjanja slovenske kulture in podpiranja učenja slovenskega jezika na Hrvaškem ter da obstaja še nekaj manevrskega prostora, da bi se njihovo delovanje lahko oblikovalo tudi v cilju, zaradi katerega so ta politična telesa nastala.

Ključne besede: predstavniki in sveti slovenske manjšine na Hrvaškem, pripadniki slovenske manjšine na Hrvaškem, slovenska društva, politično delovanje pripadnikov slovenske manjšine na Hrvaškem

VENTI ANNI DI ATTIVITÀ DEI RAPPRESENTANTI E DEI CONSIGLI DELLA MINORANZA NAZIONALE SLOVENA IN CROAZIA

SINTESI

L'articolo esamina le attività dei rappresentanti e dei consigli della minoranza nazionale slovena in Croazia, evidenziando il loro potenziale ruolo nel rafforzare i legami tra i membri della comunità slovena e le autorità locali. La ricerca si basa su dati ottenuti dall'analisi di documenti ufficiali del Governo croato e delle pubblicazioni nei media della minoranza. L'analisi dei dati sull'impegno dei membri della comunità slovena nelle attività dei consigli e dei rappresentanti della minoranza slovena in Croazia rivela che i membri attivi si dedicano prevalentemente alla preservazione della cultura slovena e alla promozione dell'apprendimento della lingua slovena in Croazia. Tuttavia, c'è ancora spazio per un ulteriore allineamento di queste attività con gli obiettivi originari per i quali questi organismi politici sono stati istituiti.

Parole chiave: rappresentanti e consigli della minoranza slovena in Croazia, membri della minoranza slovena in Croazia, associazioni slovene, partecipazione politica dei membri della minoranza slovena in Croazia

UVOD¹

Politična participacija pripadnikov manjšin sodi med temeljne manjšinske pravice in zajema njihovo sodelovanje v procesih političnega odločanja, ki jih vodijo in upravljajo organi in institucije države, v kateri narodne manjšine živijo in katere državljani so njihovi pripadniki. Njihovo vključevanje v politično življenje je kompleksna tematika in ima velik pomen za vključevanje pripadnikov manjšin v družbo, za multikulturnost ter za procese vključujočega odprtega javnega dialoga in demokracijo (Žagar, 2018), poleg tega pa tudi v prizadevanjih za lasten obstoj in razvoj ter za uresničevanje svojih interesov. Udeležba pripadnikov določene manjšine v politiki, tako na državni kot na lokalni ali regionalni ravni, močno vpliva tudi na druge pravice, ki jih določena manjšina ima. Politično delovanje pripadnikov manjšine posledično vpliva tudi na razvoj in krepitev jezikovnih, izobraževalnih in tudi kulturnih pravic, ki jih pripadniki manjšine brez aktivnega političnega udeleževanja včasih težko uresničijo (Vidau, 2017, 24).

Obseg, do katerega pripadniki manjšinskih skupin sodelujejo v političnem procesu, tudi ponazarja, kako dobro deluje demokracija v določeni državi in kako pluralistične so posamezne družbe. Manjšine lahko dobijo glas le, če se odločijo sodelovati. Enake pravice in enakopravno zastopanost si lahko zagotovijo le s sodelovanjem v politiki (Sandovici & Listhaug, 2010, 112).

Pravica narodnih manjšin do politične udeležbe pomeni omejitve absolutne vladavine večine in zagotovitev vključenosti in enakopravnosti med državljani različnih narodnosti. Politična participacija pripadnikov manjšin pomeni zagotavljanje enakopravnega vključevanja in integracijo v družbo. Pripadniki manjšine so državljani države, v kateri živijo, obenem pa so tudi člani manjšinske skupnosti in imajo zato specifične potrebe in interese, ki jih večinske politične stranke pogosto ne implementirajo v svoje programe in jih pravzaprav tudi ne poznajo. Vključevanje pripadnikov manjšin v lokalne oblasti bistveno krepi pravice manjšin (Bieber, 2008, 6).

Etnična pripadnost posameznikov pa je lahko tako motivacijski kot zaviralni dejavnik za sodelovanje v političnem življenju. Kot opozarjajo raziskovalci, so etnične skupine v nekaterih primerih lahko manj vključene v politično življenje, ker nimajo volilne pravice (niso pridobile državljanstva), prav tako pa so lahko izpostavljene diskriminaciji, zaradi katere ne sodelujejo v politiki. Pozitivna stran politične participacije pa je lahko tudi dejstvo, da politično sodelovanje manjšin spodbudi občutek pripadnosti skupnosti in občutek, da je politični aktivizem kanal za izboljšanje njihovega statusa v družbi (Sandovici & Listhaug, 2010, 112).

Specifične okoliščine, pa tudi sam položaj manjšin v družbi, otežujejo njihovo enakopravno vključevanje v politično, ekonomsko in družbeno življenje države, kjer bivajo. Zato iščejo različne možnosti za politično participacijo in uresničevanje svojih interesov. Na politično sodelovanje manjšin je možno gledati z dveh zornih kotov – z vidika pravic manjšin in z vidika demokratične stabilnosti.

Manjšinskih pravic in preprečevanja diskriminacije manjšin ni mogoče učinkovito zagotoviti, če manjšina sama ni aktivno udeležena v procese političnega odločanja, ki urejajo tudi varstvo manjšinskih pravic. Tako so brez sodelovanja pripadnikov manjšine v političnem življenju države, katere državljani so, mehanizmi varstva pravic manjšin bistveno oslabljeni (Bieber, 2008, 6).

Z vidika demokratične stabilnosti lahko ugotovimo, da obstaja nevarnost, da bodo brez posebnih zaščitnih ukrepov manjšine izključene iz političnega sistema. Možnosti političnih predstavnikov manjšinskih skupnosti za uspešno vključevanje v politični sistem so omejene. Za stabilen demokratični sistem v etnično raznolikih družbah konvencionalne institucije demokracije, brez manjšin, ne zadoščajo. Neudeležba v državnih institucijah in marginalizacija manjšin lahko vodita v odtujenost manjšin od države bivanja ter neuspešno integracijo njihovih pripadnikov (Bieber, 2008, 7).

Politična participacija je pojav, ki zajema različne oblike angažiranosti, ki se spreminjajo v časovni dimenziji (Lamprianou, 2013, 28), najpogostejša pa je sodelovanje političnih predstavnikov manjšin na volitvah ter njihova izvolitev v državne in lokalne politične institucije (Palermo & Woelk, 2003, 228–241). Formalna politična enakopravnost, ki vključuje politično participacijo manjšin in njihovo neposredno zastopstvo v državnem parlamentu, še ne zagotavlja dejanskega vključevanja, enakopravnosti in participacije manjšin in njihovih pripadnikov (Jesih, 2010).

Kot navajata Brezigar in Vidau (2020, 132), se politična participacija »uresničuje na treh ravneh: v odnosu do institucij države, v kateri narodne manjšine živijo, v odnosu do države matičnega naroda in znotraj lastne manjšinske skupnosti.« Poudarjata, da imajo narodne manjšine različne organizacije in posameznike, ki jim narodne manjšine zaupajo in jih pooblastijo, da izražajo, predstavljajo in zagovarjajo kulturne, jezikovne, gospodarske in politične interese narodne skupnosti v procesih političnega odločanja (Brezigar & Vidau, 2020, 132).

Politično participacijo manjšin lahko razumemo zelo široko in jo razdelimo na: svetovalne procese, sodelovanje in odločanje. Pri tem je treba vedeti, da ni pomembna samo raven udeležbe, ampak tudi obseg odločitev, ki jih pripadniki, vključeni v politično delovanje, lahko sprejemajo. Odločitve lahko

¹ Prispevek je nastal v okviru projekta Politična participacija narodnih manjšin in njihovih pripadnikov: primerjalna študija politične participacije slovenskih skupnosti v sosednjih državah Republike Slovenije (J5-3117); in v okviru programske skupine: Manjšinske in etnične študije ter slovensko narodno vprašanje (P5-0081).

vplivajo samo na manjšino (npr. pravica do učenja manjšinskega/maternega jezika) ali pa imajo širše posledice, ki dosegajo pripadnike manjšine, obenem pa vplivajo na in spreminjajo družbo, v kateri ti pripadniki živijo (Bieber, 2008, 9).

Vključevanje v politično participacijo oz. aktivno sodelovanje pripadnikov manjšine odpira tudi nekatere druge dileme. Namreč, nikakršnih zagotovil ni, da so pripadniki manjšine, ki predstavljajo to manjšino, vedno tudi njeni najboljši predstavniki. Celo znotraj same manjšine se odpirajo različni pogledi na ta vprašanja. Poleg tega tudi sama politična participacija ne zadošča za izboljšanje položaja pripadnikov manjšinskih skupnosti. Predstavljanje interesov samo lastne skupnosti manjšinske politične predstavnike pogosto navaja na nekakšno »leno politiko«, kar pomeni, da predstavniki sicer lahko zagotovijo kolektivne pravice manjšinskim skupnostim, ne zahtevajo pa nobenih sprememb, ne znotraj skupine ne v odnosu do »drugih« skupin (Mesić, 2013, 119), zato se na področju manjšinskih vprašanj pogosto ohranja status quo.

Prispevek se osredotoča na politično participacijo pripadnikov slovenske manjšine na Hrvaškem, in sicer tisto obliko politične participacije, ki ponuja predvsem možnost svetovalnih procesov. Pripadniki manjšin na Hrvaškem so takšen način delovanja (institucije svetov in predstavnikov manjšin) pridobili po letu 2002.

Kar zadeva delovanje in obstoj teh političnih institucij, Hrvaška ni nobena izjema, saj podobne institucije obstajajo tudi v sosednjih državah. Na Madžarskem samouprava manjšin obstaja od leta 1993, pripadniki slovenske manjšine na Madžarskem pa so svojo Državno slovensko samoupravo ustanovili leta 1995 (Munda Hirnők, 1999).

Manjšinske zakonodaje Bosne in Hercegovine, Črne gore, Makedonije in Srbije prav tako predvidevajo določene oblike sodelovanja manjšin prek svetovalnih institucij. Širjenje novih institucij manjšinskega predstavnštva (ki je samo v madžarskem, slovenskem in deloma srbskem primeru formalno-pravna manjšinska samouprava, v vseh drugih primerih pa institucija s svetovalnimi pristojnostmi) je izraz politične volje oblasti držav regije, da svojo manjšinsko zakonodajo uskladijo z mednarodnimi standardi za varstvo narodnih pravic manjšin, tudi kadar ti standardi niso pravno zavezujoči.

Okvirna konvencija za varstvo narodnih manjšin, ki je edina multilateralna, pravno zavezujoča mednarodna pogodba o varstvu manjšin, v okviru multilateralnega upravljanja etnične raznolikosti priznava pomen urejanja manjšinskih vprašanj na dvostranski ravni (Roter, 2019, 15), čeprav v njej ni pravno zavezujočih določb o posvetovalnih

manjšinskih institucijah (Petričušić, 2012, 2–3). Kot poudarja Petričušić (2012, 6–7), je kljub temu v zadnjih dveh desetletjih tudi to področje politične participacije manjšin doživelo standardizacijo v mednarodnem pravu. V tem smislu omenja priporočila iz Lunda, ki so pomembna predvsem, ko gre za učinkovito sodelovanje narodnih manjšin v javnem življenju. Čeprav so pravno nezavezujoča, priporočila spodbujajo države članice Organizacije za varnost in sodelovanje v Evropi k ustanavljanju svetovalnih institucij (Petričušić, 2012, 6–7). Ker je uresničevanje varstva pravic narodnih manjšin eden od temeljnih predpristopnih pogojev (t. i. kopenhavnska merila) za članstvo v Evropski uniji, sta bila neučinkovitost svetov narodnih manjšin ter nepripravljenost lokalnih oblasti, da zagotovijo njihovo financiranje, tudi predmet zanimanja Evropske komisije v več zaporednih poročilih o napredku Hrvaške pri izpolnjevanju obveznosti iz Stabilizacijsko-pridružitvenega sporazuma (Petričušić, 2012, 6).

Prav ta oblika politične participacije je zato med pripadniki vseh manjšin na Hrvaškem, tudi slovenske, tudi najbolj zastopana.

Cilj prispevka je prikazati razvoj političnih teles predstavnikov in svetov slovenske manjšine na Hrvaškem in njihovo delovanje.

V povezavi s ciljem se odpirajo naslednja vprašanja: ali so sveti in predstavniki slovenske manjšine prepoznani kot pomembno politično telo med pripadniki slovenske manjšine na Hrvaškem (PSMH)? Ali sveti in predstavniki slovenske manjšine lahko vplivajo, in v kolikšni meri, na izboljšanje položaja PSMH? Kakšne so aktivnosti, ki jih sveti in predstavniki slovenske manjšine izvajajo?

Prispevek temelji na podatkih, pridobljenih z analizo in primerjavo s podatki iz uradnih dokumentov Vlade Republike Hrvaške. V tem primeru je bila uporabljena metoda namiznega raziskovanja. Med pomembnimi viri podatkov so (1) podatki Državne volilne komisije (DVK) Republike Hrvaške in (2) podatki, dostopni v letnih poročilih o izvedbi Zakona o pravicah narodnih manjšin ter o porabi sredstev, zagotovljenih v državnem proračunu Republike Hrvaške.

Določeni podatki so zbrani tudi iz medijskega poročanja v času poteka volitev. Poleg tega se je skušalo zbrati podatke o političnem udejstvovanju PSMH, vendar je število člankov na to temo izredno majhno in ne more podati objektivnega prikaza situacije. Zbrani podatki lahko samo ilustrirajo in dodatno podkrepijo zaključke analize podatkov. Pregledani so bili tudi manjšinski časopisi (Novi odmev, Sopotja, Kažipot) v času od leta 2003 do leta 2023, ko je bilo analizirano tudi delovanje predstavnikov in svetov slovenske manjšine na Hrvaškem.

O politični participaciji Slovencev na Hrvaškem so pisali tudi slovenski raziskovalci (Kržišnik-Bukić, 1998; 2006; Josipović & Kržišnik-Bukić, 2010; Josipović & Škiljan, 2014, 29–47; Medvešek & Riman, 2018, 188–191; Riman & Zver, 2020; Valentinčič, 2020; 2023; 2024; Zupančič, 2022). Prispevki hrvaških raziskovalcev o položaju in delovanju predstavnikov in svetov manjšin na Hrvaškem PSMH omenjajo samo faktografsko, ko se navajajo številke iz popisa prebivalstva in se razloži politični model parlamentarnih volitev (Tatalović, 1997; 2001; 2022; Tatalović et al., 2010; 2015; Petričušić, 2021; Petričušić & Dolenc, 2021).

V prispevku so najprej predstavljena politična (svetovalna) telesa manjšin na Hrvaškem nasploh, nato pa je poudarek na svetih in predstavnikih slovenske manjšine na Hrvaškem.

SVETI IN PREDSTAVNIKI NARODNIH MANJŠIN NA HRVAŠKEM

Možnosti politične udeležbe, ki jih hrvaška zakonodaja omogoča pripadnikom manjšin,² torej tudi PSMH, so različne. Hrvaška zagotavlja naslednje modele vključevanja pripadnikov manjšin v politično življenje skupnosti, v katerih živijo: (1) delovanje v hrvaškem parlamentu; (2) sodelovanje v predstavniških telesih lokalnih in regionalnih oblasti; (3) delovanje v županijskih skupščinah, mestnih in občinskih svetih ter (4) izvolitev v izvršna telesa lokalne in regionalne samouprave (na mesta občinskih načelnikov, podžupanov na ravni mesta in županij) (Petričušić, 2021, 8).

Ustavni zakon o pravicah manjšin na Hrvaškem je poleg omenjenega vzpostavil tudi svete in predstavnike narodnih manjšin na Hrvaškem kot telesa politične participacije manjšin s ciljem ohranjanja, krepitve ter nasploh napredovanja in zaščite pripadnikov manjšin na Hrvaškem (Petričušić, 2021, 8).³ Sveti in predstavniki narodnih manjšin imajo svetovalno funkcijo in predstavljajo kanal za vzpostavitev dialoga med regionalno oziroma lokalno samoupravo in narodno manjšino. Raziskovalci političnega vključevanja pripadnikov manjšin na Hrvaškem pa vlogo predstavnikov in svetov manjšin primerjajo z vlogo statistov v sedmi umetnosti – sveti in predstavniki pripomorejo le k oblikovanju slike o manjšinski vključenosti v politiko v formalno-pravnem smislu, dejansko pa nimajo nobene moči (Mašić, 2022, 76).

Sveti in predstavniki manjšin bi sicer lahko imeli pomembno vlogo, v resnici pa imajo malo pravega političnega vpliva. Čeprav gre za institucijo manjšinskega predstavnštva, ki ima občasno visoko normativno zaščito, je pri analizi njihove vloge z vidika neteritorialne avtonomije treba upoštevati tudi obseg avtonomije pri odločanju o manjšinskih vprašanjih, področja politike, ki jih pokrivajo, globino, do katere so institucionalizirani, ter materialne in upravne zmogljivosti, ki jih imajo na voljo pri upravljanju teh zadev, vključno s finančno avtonomijo (Beretka & Dobos, 2023). Rezultati raziskovanja nekaterih hrvaških raziskovalcev opozarjajo predvsem na konzultativno vlogo, vprašanje legitimnosti in na številne izzive pri njihovem delovanju (Vukojić Tomić, 2023, 142–143).

To politično telo pripadnikom manjšin namreč zagotavlja neposreden vpliv na reševanje tistih vprašanj, ki so v pristojnosti lokalne oblasti, ter jim omogoča, da predlagajo rešitve za vprašanja, ki so izjemno pomembna za narodne manjšine, in soustvarjajo lokalno politiko. Teoretično lahko vplivajo na vse sfere življenja na ravni lokalne in regionalne oblasti, vendar v praksi temu ni tako in so njihove pobude pogosto preprosto prezrte (Petričušić, 2012, 95). Izziv predstavlja tudi dejstvo, da širši krog pripadnikov manjšinske skupnosti pogosto ne vidi koristi za samo skupnost ali pa za posamezne pobude ni zainteresiran. Na to kaže predvsem slaba udeležba na volitvah (Mašić, 2022, 77), pojavljajo pa se tudi druge težave, ki vplivajo na delovanje, prepoznavnost, pa tudi željo po sodelovanju in prevzemu določenih odgovornosti, povezanih z delovanjem v svetu ali kot predstavnik manjšine.

Udeležba na volitvah je, kot rečeno, slaba, vendar to ni značilno samo za pripadnike slovenske manjšine na Hrvaškem. V letu 2007 so se v večjem številu volitev udeležili Madžari, Nemci in Romi, manj pa Srbi, Slovenci in Makedonci (Tatalović et al., 2011, 73). To je konstanta, ki je prisotna od samih začetkov. Dejstvo je, da se pripadniki slovenske manjšine volitev udeležujejo v manjšem številu v primerjavi s pripadniki ostalih manjšin. Do sedaj evidentirani razlogi za to so:

- slaba medijska pokritost in informiranost o volitvah, ki se jih obravnava kot popolnoma nepomembne (Zebić, 2023a);

2 V Ustavu Republike Hrvaške je zapisanih 22 manjšin (Ustav Republike Hrvatske, 2019) in po popisu prebivalstva iz leta 2021 je situacija naslednja (po abecedi): Albanci 13.817 (0,36 %), Avstrijci 365 (0,01 %), Bošnjaki 24.131 (0,62 %), Bolgari 262 (0,01 %), Črnogorci 3.127 (0,08 %), Čehi 7.862 (0,20 %), Madžari 10.315 (0,27 %), Makedonci 3.555 (0,09 %), Nemci 3.034 (0,08 %), Poljaki 657 (0,02 %), Romi 17.980 (0,46 %), Romuni 337 (0,01 %), Rusi 1.481 (0,04 %), Rusini 1.343 (0,03 %), Slovaki 3.688 (0,10 %), Slovenci 7.729 (0,20 %), Srbi 123.892 (3,20 %), Italijani 13.763 (0,36 %), Turki 404 (0,01 %), Ukrajinci 1.905 (0,05 %), Vlasi 22 (0,00 %) in Židi 410 (0,01 %) (ULJPPNM, 2023).

3 Pripadniki manjšin, navzoči v zadostnem, predpisanem številu v županijah (najmanj 500), mestih in občinah (najmanj 200 ali 1,5 %) volijo svete, v enotah, kjer so številčno šibkejši (najmanj 100), pa imajo pravico do predstavnika (Zakon o izboru vijeća i predstavnika nacionalnih manjina, 2019).

- slaba informiranost o pomenu svetov in predstavnikov manjšin; omejena vloga svetov in predstavnikov manjšin, ki nimajo prav veliko pristojnosti (Zebić, 2023b);
- zelo majhno število volišč, obenem pa se s prihodom na volišče tudi javno opredelijo za pripadnike manjšine, kar odpira tudi problem diskriminacije (Samardžija, 2023);
- šibka finančna podpora delu predstavnikov in članov sveta manjšin (Hina, 2023) ter
- neprepoznavna vloga svetov in predstavnikov manjšin nasploh;
- možnost stigmatizacije pripadnikov manjšin, ker svoje predstavnike izbirajo v posebnem volilnem ciklusu (Samardžija, 2023).

Udeležba na volitvah v letu 2023 je prikazana v Tabeli 1.

Kot je razvidno iz podatkov v Tabeli 1, so od skupno 19 manjšin najslabšo volilno udeležbo zabeležili prav pripadniki slovenske manjšine.

Majhno število kandidatov in nizka volilna udeležba sta pokazatelja, da sveti in predstavniki tudi med samimi pripadniki manjšine niso prepoznani kot relevantni mehanizem, s katerim bi lahko vplivali na izboljšanje svojega položaja (Petričušić, 2012, 103).

Zadnje volitve za svete in predstavnike manjšin na Hrvaškem so potekale v letu 2023. Razpisanih je bilo 592 mest, in sicer 451 za člane svetov narodnih manjšin (61 v županijah in Mestu Zagreb, 151 v mestih in 239 v občinah) ter 141 za predstavnike narodnih manjšin (96 v županijah in Mestu Zagreb, 44 v mesta in 1 v občini) (DVK, 2023a).

Volitve so bile razpisane na podlagi popisa prebivalstva iz leta 2021. Zaradi zmanjšanja števila PSMH (v letu 2021 jih je bilo 7.729, v letu 2011 pa 10.517 (DZS, 2011; 2021)) je slovenska manjšina v določenih krajih izgubila možnost za izvolitev predstavnikov oz. svetov.

Omeniti velja, da je slovenska skupnost v letu 2023 imela možnost izvolitve 35 predstavnikov ali svetov slovenske manjšine, dejansko pa so jih izvolili samo 18 in to predvsem na območjih, kjer obstajajo slovenska kulturna društva.

V primerjavi z letom 2019, ko so potekale prejšnje volitve za predstavnike in svete slovenske manjšine na Hrvaškem, so PSMH izgubili možnost volitev za izbor svetov v Splitsko-dalmatinski županiji (v letu 2023 je bila možnost izvolitve predstavnika), Mestu Split (v letu 2023 je bila možnost izvolitve predstavnika) in Zagrebški županiji (v letu 2023 je bila možnost izvolitve predstavnika) ter predstavnikov v Siško-moslavski županiji, Bjelovarsko-bilogorski županiji, Mestu Karlovec, Mestu Varaždin, Mestu Osijek in Mestu Poreč (DVK, 2019; 2023b).

Tabela 1: Podatki o volilni udeležbi (vir: DVK, 2023b).

	Pripadniki manjšine	Volilna udeležba v %
1.	Rusi	20,41
2.	Romi	19,56
3.	Madžari	18,32
4.	Bošnjaki	17,73
5.	Slovaki	16,83
6.	Čehi	16,81
7.	Rusini	16,50
8.	Judje	13,11
9.	Ukrajinci	13,11
10.	Albanci	9,85
11.	Nemci	9,61
12.	Poljaki	8,77
13.	Makedonci	8,50
14.	Srbi	8,38
15.	Italijani	8,32
16.	Bolgari	6,90
17.	Turki	6,15
18.	Črnogorci	5,02
19.	Slovenci	4,56

SVETI IN PREDSTAVNIKI SLOVENSKE MANJŠINE NA HRVAŠKEM

Število PSMH se kontinuirano zmanjšuje. V letu 2021 je bilo zabeleženih le še 7729 Slovencev, od katerih je samo 4,19 % (torej le 324) mlajših od 19 let (Riman & Štiglic, 2023b, 312).

PSMH so predvsem organizirani v kulturna društva. Razlog za takšno institucionalizacijo je, kot navaja Zupančič (2022, 344), dejstvo, da se zaradi skupnega bivanja v Jugoslaviji nekatere potrebe po politični organiziranosti in uveljavljanju različnih »manjšinskih« struktur niti niso pojavljale. Po njegovem mnenju je oblikovanje Zveze slovenskih društev na Hrvaškem kot krovne organizacijske oblike z izključno koordinacijskim namenom celo preseglo to, kar narekujejo predpisane oblike manjšinskega delovanja na Hrvaškem.

Trenutno na Hrvaškem deluje 16 slovenskih društev (Riman, 2023, 31) in Kmečko-izobraževalna skupnost Gorski kotar. Pregled aktivnosti slovenskih društev na Hrvaškem kaže, da gre predvsem za aktivnosti, povezane s tradicionalno slovensko kulturo. Člani društev so aktivni v sekcijah, kot so folklor,

dramske sekcije, pevski zbori. Slovenska društva in delovanje njihovih članov so tako jedro slovenstva na Hrvaškem (Riman & Štiglić, 2023b, 313).

Drug način manjšinskega delovanja na Hrvaškem so manjšinske samouprave (sveti in predstavniki slovenske manjšine na Hrvaškem) (Zupančič, 2022, 344). Pomembno je omeniti, da obstaja povezava med sveti in predstavniki, ki delujejo na geografskem prostoru, kjer so aktivna tudi slovenska društva. Sveti in predstavniki slovenske manjšine na Hrvaškem pogosto podpirajo delovanje slovenskih kulturnih društev, v sodelovanju z društvi pripravljajo tudi svoja glasila ter organizirajo in podpirajo pouk slovenskega jezika⁴ in kulture ob podpori Slovenije (Riman, 2022a, 64; Riman & Štiglić, 2023b, 313).

Prve volitve svetov in predstavnikov narodnih manjšin na Hrvaškem so potekale v letu 2003 in so bile ponovljene leta 2004. Zanje je bila značilna nizka volilna udeležba vseh manjšin. V prvem mandatu so se v glavnem reševale organizacijske težave, izobraževali so se predstavniki manjšin, delalo se je tudi na vzpostavitvi komunikacije z organi lokalnih in regionalnih oblasti (Tatalović et al., 2010, 4). Pripadniki večine manjšin na Hrvaškem, tudi slovenske, so bili na prve volitve nepripravljeni in po mnenju predstavnikov slovenske manjšine »... se je pokazalo, da niso bile kakovostno pripravljene« (DELO, 2007). Po prvih volitvah je vodstvo Zveze slovenskih društev na Hrvaškem (Zveza) izrazilo svoje mnenje:

Uveljavitev Ustavnega zakona od 23. člena do vključno 34. člena je bila izjemno otežena zaradi nerazumno kratkega roka, ki ga je postavila Vlada Republike Hrvaške. Slovenska narodna manjšina v Republiki Hrvaški je uspela izvesti predpisana dejanja kandidiranja in volitev za svete v mestu Zagreb, Reka, Pula in nepopolno v Splitu ter za predstavnike v mestu Šibenik, tj. samo v tistih mestih, kjer delujejo slovenska kulturna društva. V vseh drugih občinah, mestih in županijah volitve niso bile izvedene, ker slovenska narodna manjšina ni imela možnosti, da bi bila ustrezno informirana in organizirano izvajala predpisana dejanja kandidiranja. (ACFC/SR/II, 2004, 54)

Kot je razvidno iz komentarja predstavnikov Zveze, je bil prav neobstoj slovenskih kulturnih društev od samega začetka izziv predvsem za kandidiranje posameznikov na listah v krajih, kjer društev ni.

Čeprav pred vsakimi volitvami potekajo določene kampanje za motivacijo volivcev (Strašek, 2003a, 13; Mirković, 2015a; 2019; 2023; JPT, 2015; 2019; TBB, 2023), PSMH

Tabela 2: Število izvoljenih svetov in predstavnikov na manjšinskih volitvah, 2003–2023 (vir: DVK, 2003; 2004; 2007; 2011; 2015; 2019; 2023a).

Leto volitev	Izvoljenih	Možnih izvolitev
2003, 2004	14	42
2007	20	32
2011	22	32
2015	23	31
2019	22	40
2023	18	34

ne izkoristijo ponujenih priložnosti. Prikaz izvoljenih in možnih svetov in predstavnikov slovenske manjšine v obdobju med letoma 2003 in 2023 je v Tabeli 2.

Iz tabele je razvidno, da je bilo največ možnosti izrabljenih v letu 2015, ko so PSMH izrabili 74,19 % razpisanih mest. V tem letu so imeli tudi največje število predstavnikov. V letu 2019 so izkoristili 55 % možnosti, v letu 2023 pa samo 52,94 % možnosti.

Rezultat za leto 2023 kaže, da so bili sveti nepopolni, saj je bilo na določenih listah manj kandidatov. Tudi to opozarja na nezainteresiranost PSMH za politično udeležbo. To ni nič novega, saj je o tem že leta 2007 govoril tedanji predsednik Zveze Darko Šonc: »Kot so pokazale analize, je bila slaba udeležba posledica nezainteresiranosti pripadnikov manjšin za tovrstne volitve ter dejstva, da se marsikateri pripadniki manjšin niso želeli izpostavljati kot pripadniki manjšine« (DELO, 2007). Liste kandidatov po narodnih manjšinah so vse od prvih volitev javno dostopne na spletni strani DVK, zato obstaja določena skrb glede javnega izpostavljanja v smislu pripadnosti določeni manjšini.

Analiza podatkov o neudeležbi na volitvah (Tabela 3) pa kaže na pomanjkanje kandidatov na geografskih območjih, kjer ne obstajajo slovenska kulturna društva, ki bi lahko tudi kandidirala posameznike na volilne liste.

Možnost, ki jo ponuja hrvaška zakonodaja, da tudi društva kandidirajo posameznike, pri čemer listo sestavi eno ali več društev (Zakon o izboru vijeća i predstavnik nacionalnih manjina, 2019), je vsekakor pozitivna, saj potem obstaja dovolj veliko število posameznikov, ki so v hrvaškem volilnem imeniku⁵ opredeljeni kot Slovenci in so pripravljeni kandidirati, zato je možna tudi izbira ustrežnejših kandidatov. Hkrati to odpira tudi določene izzive, saj so v društvih aktivni predvsem posamezniki, ki imajo

4 O učenju slovenskega jezika na Hrvaškem cf. Medvešek & Novak Lukanović (2016); Medvešek (2017); Riman & Novak Lukanović (2021; 2023); Riman (2022b; 2022c).

5 Volilni imenik (Registar birača hrv.) je zbirka podatkov o vseh volivcih, ki so hrvaški državljani (tudi pripadniki manjšin) s stalnim prebivališčem na območju Hrvaške, hrvaški državljani, ki ne živijo na Hrvaškem, ter državljanov drugih držav članic EU, ki uresničujejo svojo volilno pravico na Hrvaškem. Volilni imenik se vodi po uradni dolžnosti za vsako mesto oz. občino. Pripadnik manjšine se v volilni imenik lahko vpiše pod pogojem, da je državljan Republike Hrvaške ter da ima prebivališče na Hrvaškem. Po zakonu pripadnik manjšine svojo nacionalnost lahko spremeni pred pristojnim upravnim organom (Zakon o registru birača, 2019).

Tabela 3: Potek volitev, spreminjanje možnosti volitev, kraji brez kandidatov (vir: DVK, 2003; DVK 2004; DVK, 2007; DVK, 2011; DVK, 2015; DVK, 2019; DVK, 2023).

Kraji razpisa volitev ⁶	Vrsta (P - predstavnik; S - svet)	Leto volitev					
		2003/2004	2007	2011	2015	2019	2023
Zagrebska županija	S	X	X	X	X	X	X
Mesto Samobor	P	+	+	+	+	+	+
Krapinsko-zagorska županija	P	X	X	X	X	X	X
Občina Zagorska Sela	S	X	-	-	-	X	X
Občina Hum na Sutli	S	X	X	X	X	X	X
Siško-moslavinska županija	P	X	X	X	X	X	-
Karlovška županija	P	X	+	+	+	+	+
Mesto Karlovec	P	+	+	+	+	+	-
Občina Bosiljevo	S	X	-	-	-	X	X
Občina Žakanje	S	-	-	-	-	X	X
Občina Kamanje	S	-	-	-	-	-	X
Varaždinska županija	S/P	X	+	+	+	+	+
Mesto Varaždin	P	X	+	+	+	+	-
Občina Cestica	S/P	X	+	+	+	+	+
Koprivniško-križevska županija	P	X	X	X	-	-	-
Bjelovarsko-bilogorska županija	P	X	X	X	X	X	-
Primorsko-goranska županija	S	+	+	+	+	+	+
Mesto Reka	S	+	+	+	+	+	+
Mesto Čabar	S	X	-	-	-	+	+
Mesto Opatija	S	X	X	+	+	+	X
Občina Klana	S	X	-	-	-	-	-
Občina Lovran	S	+	-	-	-	-	-
Občina Matulji	S	X	X	X	+	+	+
Zadska županija	P	+	+	+	+	+	+
Mesto Zadar	P	+	+	+	+	+	+
Splitsko-dalmatinska	S/P	+	+	+	+	+	+
Mesto Split	S/P	+	+	+	+	+	+
Osiješko-baranjska županija	P	X	+	+	+	+	+
Mesto Osijek	P	X	+	+	+	+	-
Šibeniško-kninska županija	P	+	X	+	+	X	+
Istrska županija	S	+	+	+	+	+	+
Mesto Pulj	S	+	+	+	+	+	+
Mesto Poreč	P	X	+	+	+	+	-
Mesto Umag	S	+	+	+	+	+	+
Mesto Buje	S	X	X	X	X	X	X
Mesto Novigrad	S	X	-	-	-	X	X
Občina Brtonigla	S	X	-	-	-	X	X
Občina Grožnja	S	X	-	-	-	X	X
Občina Oprtalj	S	-	-	-	-	-	X
Dubrovniško-neretvanska županija	P	-	+	+	X	X	X
Medžimurska županija	S	X	X	X	X	X	X
Občina Gornji Mihaljevec	S	X	-	-	-	X	X
Občina Sveti Martin na Muri	S	X	-	-	-	X	-
Občina Štrigova	S/P	X	-	-	+	X	X
Mesto Čakovec	P	X	X	X	-	-	-
Mesto Zagreb	S	+	+	+	+	+	+
		14	20	22	23	22	18

interes za ohranjanje slovenskega jezika in kulture, društva pa zaradi njihove angažiranosti po navadi kandidirajo prav njih. Žal pa so slednji manj seznanjeni s političnimi dejavnostmi in vsemi pravicami, ki jih Republika Hrvaška

ponuja manjšinam, tudi slovenski. Celoten pregled poteka volitev, spreminjanja možnosti volitev, krajev brez kandidatov in krajev, kjer obstajajo sveti in predstavniki že več kot 20 let, je v Tabeli 3.

6 Legenda: S - svet; P - predstavnik; + - izbran svet/predstavnik; X - brez kandidatur; - - niso razpisane volitve

Kot je razvidno iz Tabele 3, za določene kraje že vse od same uvedbe možnosti izvolitev svetov in predstavnikov manjšin na Hrvaškem ni bilo kandidatov za volitve. Na ravni županije so to: Zagrebška, Siško-moslavinska, Bjelovarsko-bilogorska, Krapinsko-zagorska in Medžimurska županija. Predvsem preseneča, da ni bilo interesa v tistih dveh županijah, ki mejita na Republiko Slovenijo. Analiza iz Tabele 3 kaže, da v teh dveh županijah ni bilo kandidatov in svetov oz. predstavnikov ne na ravni občine ne na ravni mesta (izjema je Štrigova v mandatu 2015–2019). Tako ni bil izvoljen svet ali predstavnik na ravni občine: Zagorska sela in Hum na Sutli (v Krapinsko-zagorski županiji); Žakanje, Kamanje in Bosiljevo (v Karlovški županiji); Brtonigla, Grožnjan in Oprtalj (v Istrski županiji); Gornji Mihaljevec, Sveti Martin na Muri (v Medžimurski županiji). Sveti ali predstavniki niso bili izvoljeni niti v Čakovcu (Medžimurska županija), Bujah in Novigradu (Istrska županija).

Predvsem so to kraji, kjer je slabša (samo) organizacija, oz. kraji, kjer ne obstajajo slovenska društva. Pomembno pa je poudariti, da nekateri od njih mejijo na Republiko Slovenijo in je bilo za pričakovati, da bodo vsaj ti imeli kandidate, vendar v teh krajih ni slovenskih društev ali drugih slovenskih organizacij, ki bi lahko bili pobudniki ali bi poiskali ustrezne in zainteresirane kandidate za sodelovanje kot člani svetov in predstavniki slovenske manjšine. Prav tako ni zabeležen niti obstoj drugih pravic, ki bi jih PSMH v teh krajih uveljavljali, kot je npr. učenje slovenskega (maternega) jezika v šolah (npr. v občinah Kamanje, Žakanje, Bosiljevo, Hum na Sutli), kjer bi se posredno lahko evidentirali posamezniki, predvsem starši, ki bi mogoče bili zainteresirani za sodelovanje v slovenski samoupravi na Hrvaškem. Zavedati se tudi moramo, da so v tej skupini predvsem ruralni kraji, kjer je interes PSMH drugačen kot interesi PSMH v urbanih krajih.

Druga skupina so tisti kraji, kjer se situacija spreminja in so kandidati včasih na voljo, včasih pa ne. Krajev v tej skupini je manj in v njih ni slovenskega društva oz. društvo obstaja v nekem drugem kraju v županiji, ampak ni aktivno na ravni celotne županije.

Med vsemi v drugi skupini naštetimi kraji pa ima poseben položaj Občina Štrigova. V letu 2003 so bile razpisane volitve, ampak ni bilo kandidata. Ponovno so bile volitve razpisane v letu 2015, ko se je prijavila ena kandidatka, ki je bila izbrana z enim glasom. Potrdila je, da je samo ona volila, ker

da drugi pripadniki niso vedeli, da potekajo volitve, ter da tudi ona ni vedela za volitve, dokler je niso poklicali iz slovenskega doma Nagelj dva dni pred samimi volitvami in jo prosili za sodelovanje (Bet, 2015). Pomembno se zdi še poudariti, da je tedanji (in sedanj) načelnik občine takrat omenil, da ni jasno in »... ne pozna vzroka, zakaj se je večje število prebivalstva opredelilo za Slovence. [...] Morda se počutijo bolj svobodni in so se opredelili kot manjšina« (Bet, 2015). Zanimivo je, da na naslednjih volitvah leta 2019 in leta 2023 spet ni bilo nobenega kandidata. V obrazložitve, da že v letu 2019 ni bilo kandidata, je načelnik občine Stanislav Rebernik komentiral: »Vsem tistim, ki se opredeljujejo kot Slovenci in Slovenke, niso ogrožene nobene svoboščine, niso ogroženi in živijo dobro« (Mesarič, 2019).⁷ To je bil obenem tudi edini primer izvolitve predstavnika ali sveta na področju Medžimurske županije.

V Občini Štrigova ni bilo slovenskega društva, temveč je predstavnico kandidiralo društvo iz Varaždina (Bet, 2015), podobno je bilo tudi v Občini Matulji, Mestu Opatija, Občini Cestica, na zadnjih volitvah pa tudi v Šibeniško-kninski županiji, kjer je predstavnico predlagalo Slovensko kulturno društvo Triglav iz Splita. V nekaterih krajih, kot je npr. Dubrovniško-neretvanska županija, čeprav obstaja društvo, ki bi lahko kandidiralo posameznike, v letu 2023 ni bilo kandidata.

Tretja skupina krajev je tista, kjer so predstavniki in sveti bili izvoljeni in se kontinuirano volijo na vsakih volitvah. To so predvsem sveti in predstavniki v krajih, kjer obstajajo slovenska društva in je njihovo delovanje živahno, saj, kot je bilo že omenjeno, prav društva organizirajo liste in kandidirajo posameznike.

Poleg nezainteresiranosti posameznikov, da bi kandidirali in prevzeli vlogo predstavnikov oz. članov sveta, je slaba tudi udeležba na volitvah. Analiza števila volivcev, vpisanih v volilni imenik, prikazuje majhno udeležbo. Udeležbo je treba gledati v širšem kontekstu in primerjati z udeležbo drugih manjšin, ki so bile upravičene do izbire predstavnikov in svetov. Podatki o udeležbi na volitvah v obdobju med letoma 2003/2004 in 2023 so v Tabeli 4.

Z izjemo prvih volitev (2003/2004) so imeli PSMH v povprečju vedno nižjo udeležbo kot pripadniki drugih manjšin. V takem vzdušju so potekale volitve tudi v letu 2023, ko so bili PSMH pravi rekorderji nizke volilne udeležbe.

⁷ Za boljše razumevanje situacije v Občini Štrigova je treba omeniti, da se je prav v Štrigovi začelo z učenjem slovenskega jezika po modelu C, in to že v šolskem letu 2007/2008. Že naslednje leto to ni bilo več mogoče, saj naj ne bi bilo izkazanega interesa med učenci. Kljub temu pa posamezni učenci iz tega šolskega okraja obiskujejo osnovno šolo v Sloveniji (Mesarič, 2010, 9; 2012, 10–11; Krauthaker, 2010). Še vedno ni jasno, zakaj niso omogočili učenja slovenskega jezika, ki je zagotovljeno tako po hrvaški ustavi kot tudi z različnimi drugimi hrvaškimi zakoni. Iz novinarskega prispevka izhaja, da je načelnik Občine Štrigova omenjal reciprociteto in možnosti učenja hrvaškega jezika v slovenskih šolah, kar obstaja (Mesarič, 2010, 9).

Tabela 4: Primerjava volilne udeležbe vseh manjšin in PSMH v obdobju med letoma 2003/2004 in 2023 (vir: DVK, 2003; 2004; 2007; 2011; 2015; 2019; 2023a).

Volitve	Raven	Odziv volivcev v %											
		2003/2004		2007		2011		2015		2019		2023	
		Vsi	PSMH	Vsi	PSMH	Vsi	PSMH	Vsi	PSMH	Vsi	PSMH	Vsi	PSMH
Svet	Županija	10,21	12,22	9,88	5,26	10,44	4,77	13,48	5,22	12,61	4,06	10,36	3,81
	Mesto	10,84	7,5	8,04	3,92	9,45	4,83	12,27	6,59	10,90	4,64	9,21	5,43
	Občina	22,13	-	17,02	-	15,93	-	22,97	5,15	23,13	11,23	18,54	11,20
Predstavniki	Županija	15,83	15,56	12,55	2,65	13,30	2,60	13,63	7,17	10,88	6,69	8,94	4,65
	Mesto	24,45	-	11,03	5,11	17,47	6,98	14,30	10,00	13,86	9,43	10,20	5,56
	Občina	17,42	-	18,08	3,90	23,51	9,09	16,37	3,57	10,68	-	4,74	-

Ovisno od števila kandidatov in možnosti, ki so jih PSMH imeli ob izdaji odloka o razpisu volitev, se razlikuje število PSMH, ki so aktivni kot predstavniki ali člani svetov. Eno je, kar poročajo uradni podatki DVK, če pa se analizirajo poimensko vse liste izbranih kandidatov, se skupno število zmanjša, saj se nekateri kandidati pojavljajo na dveh listah. Podatki so v Tabeli 5.

Uradno število po podatkih DVK je treba zmanjšati za število oseb, ki so kandidirale na dveh listah. To je pomembno zato, da se pridobijo realne številke posameznikov, ki so aktivni v teh političnih telesih. Uradne številke, kjer se pojavlja ena oseba na dveh listah, so zavajajoče, saj se zdi, da je aktivno število

PSMH večje, kot dejansko je. V glavnem so to posamezniki, ki so uvrščeni na listo županije in potem še na listo mesta ali občine. Razlog je v tem, da slovenske organizacije ne morejo motivirati dovolj članov, da bi se zapolnile vse liste. Največ istih kandidatov je bilo na listah v letu 2019, in sicer 20,22 %. V letu 2007 je bilo na listah 17,86 % istih članov, v letu 2011 19,67 %, v letu 2015 16,03 %, v letu 2023 pa 16,46 %.

Zelo zaskrbljujoča je starostna struktura predstavnikov in izbranih članov slovenske manjšine. Podatki DVK kažejo, da je samo 1,89 % (3 osebe) predstavnikov in članov sveta mlajših od 30 let. Vse ostalo so člani, starejši od 30 let (DVK, 2023b).

Tabela 5: Število izvoljenih po podatkih DVK in korigirane številke (vir: DVK, 2003; 2004; 2007; 2011; 2015; 2019; 2023a).

Leto volitev	Število izvoljenih po podatkih DVK	M	Ž	Korigirana številka izvoljenih predstavnikov in članov sveta	M	Ž
2003	43	15	28	43	15	28
2007	168	67	112	138	57	81
2011	178	68	119	143	52	91
2015	181	58	123	152	48	104
2019	188	53	135	150	41	109
2023	158	44	114	132	34	98

Obveznost samoupravnih enot do financiranja svetov je precej ozko oblikovana. Ustavni zakon določa, da se sredstva za delo svetov in predstavnikov zagotavljajo iz sredstev samoupravnih enot, ne predpisuje pa možnih sankcij za tiste enote, ki tega ne storijo. Obstajata dve obliki financiranja sveta predstavnikov narodnih manjšin; prva je nagrada za delo in povračilo stroškov izvoljenih članov sveta in predstavnikov, druga pa financiranje programa, po katerem letno opravljajo svojo dejavnost (Mašić, 2022, 82). Glede na simbolično vrednost dodeljenih sredstev določenim svetom in predstavnikom je jasno, da je obseg dejavnosti, ki jih lahko sveti in predstavništva financirajo, zelo omejen (Petričušić, 2012). Sveti in predstavniki se financirajo iz lokalne skupnosti. Za ilustracijo, leta 2019 je največ denarja za predstavnike in svete dodelilo Mesto Zagreb, najmanj pa Medžimurska županija (Mašić, 2022, 87).

V letu 2015 so sveti in predstavniki slovenske manjšine pridobili 147.009,23 evrov (Mašić, 2022, 86), v letu 2019 pa 190.422,56 evrov. Za primerjavo lahko navedemo, da so predstavniki in sveti srbske manjšine dobili 901.247,44 evrov v letu 2015 in 1.036.370,48 evrov v letu 2019 (Mašić, 2022, 89). V zakonih ni natančno napisano, za kaj vse se lahko finančna sredstva, ki se pridobijo po oblikovanem vsebinskem in finančnem načrtu za proračunsko leto, porabijo. Praksa je pokazala, da lokalna oblast financira vse aktivnosti, povezane v smeri ohranjanja in negovanja manjšinske identitete. Poudariti pa velja, da se finančna podpora zelo razlikuje, saj je odvisna od možnosti lokalne skupnosti.

Prikaz situacije za svete in predstavnike slovenske manjšine med letoma 2018 in 2021 na Hrvaškem je v Tabeli 6. Tu so zbrani primeri za tri najvišje in tri najnižje finančne podpore v letu 2021.

Po podatkih je razvidno, da županije, mesta in občine vsako leto namenijo približno enako vsoto denarja ter da ni velike razlike med leti. Rubrika Znesek porabljenih sredstev v Tabeli 6 kaže, koliko sredstev je skupnost dobila in koliko jih je porabila za delovanje članov ali za izvedene programe. Svet in predstavniki sredstva porabljajo različno. Nekateri porabijo vse, kar je na voljo, drugi pa nič od ponujenega, zaradi česar se odpira tudi vprašanje njihovega delovanja.

Po poročilih lokalne in regionalne samouprave so razlogi za nižjo porabo od načrtovanega nezadostna zainteresiranost svetov in predstavnikov narodnih manjšin ter neizpolnjevanje nekaterih predpogojev, ki so potrebni za uresničevanje pravice do načrtovanih finančnih sredstev. Raziskave so pokazale, da nekateri sveti in predstavniki narodnih manjšin v samoupravnih enotah v letu 2019, enako kot v preteklem obdobju, niso izkazali večjega zanimanja za delovanje in delo, niso pripravili letnih

načrtov dela ter niso vlagali zahtevkov za sredstva iz proračuna lokalne in regionalne samouprave. Zaradi tega niso bila porabljena vsa načrtovana sredstva (MIZ, 2021a, 50).

Delovanje sveta pomeni predvsem redne seje, vsebinsko in finančno poročanje o delu ter redno oddajanje zaključnih računov pristojnim lokalnim in regionalnim samoupravam (Karajić et al., 2017, 90–95). Iz analize slovenskega manjšinskega časopisa je možno izluščiti najbolj pogoste aktivnosti, kar potem dodatno ilustrira delovanje in funkcijo predstavnikov in svetov slovenske manjšine na Hrvaškem.

Iz manjšinskih glasil je razvidno, da so stalnica predvsem seje sveta, za katere večje število članov lahko dobi denarni dodatek (*naknada za delovanje u vijeću*, hrv.). O sejah nekaterih svetov, odvisno od tega, ali so člani sveta o tem poročali in obvestilo poslali urednikom slovenskih glasil na Hrvaškem, so poročala tudi slovenska manjšinska glasila (Strašek, 2003b; 2003c; 2003d; Kordiš, 2004; Klinar Medaković, 2017, 8).

Na sejah so se člani dogovarjali o dejavnostih, ki jih bodo izvajali. Šlo je predvsem za kulturne dejavnosti, povezane z obeleževanjem pomembnih datumov v slovenskih zgodovini ali predstavitvijo življenja in delovanja pomembnih oseb iz slovenske zgodovine (npr. Stanko Vraz, Primož Trubar, Josip Kaplan) (Trkman Kravar, 2017, 16). Člani so predlagali in tudi spodbujali projekte, ki so prispevali k ohranitvi, dokumentiranju in promociji slovenske dediščine na Hrvaškem: z organizacijo predavanj slovenskih in hrvaških znanstvenikov in strokovnjakov in z organizacijo znanstveno-strokovnih dogodkov (Mirković, 2005, 5; 2006b, 9–10; 2008, 14), tudi v povezavi s slovensko kulturo in jezikom (Mirković, 2006a, 12). Izjemno raznolika in bogata pa je založniška dejavnost, predvsem izdaja monografij, povezanih z zgodovino slovenske skupnosti na Hrvaškem (Hemar, 2014; 2018; Hečimović et al., 2011; Lukežić, 2011; Mirković, 2012 5–6; Riman, 2019). Redno se organizirajo tudi strokovne ekskurzije v Slovenijo ali druge kraje na Hrvaškem, ki so povezani z zgodovino Slovencev na Hrvaškem (Jurinić, 2018, 12; Trkman Kravar, 2017, 12; Nikčević, 2022, 10).

Glede založniške dejavnosti velja omeniti, da so sveti imeli in še vedno imajo pomembno vlogo, saj s svojimi finančnimi podporami omogočajo izdajo manjšinskih slovenskih glasil, ki so izjemno pomembna v rekonstrukciji življenja in delovanja PSMH v zadnjih tridesetih letih.

Relativno malo aktivnosti pa je povezanih s političnim delovanjem v smislu uresničevanja pravic, ki jih pripadniki slovenske skupnosti na Hrvaškem po Ustavnem zakonu za narodne manjšine (2002)

Tabela 6: Prikaz finančne podpore za predstavnike in svete slovenske manjšine, 2018–2021, v EUR (vir: MIZ, 2019; 2021a; 2021b; 2022).

Županija /mesto / občina	Znesek načrtovanih sredstev za leto 2018	Znesek porabljenih sredstev za leto 2018	Znesek načrtovanih sredstev za leto 2019	Znesek porabljenih sredstev za leto 2019	Znesek načrtovanih sredstev za leto 2020	Znesek porabljenih sredstev za leto 2020	Znesek načrtovanih sredstev za leto 2021	Znesek porabljenih sredstev za leto 2021
Mesto Zagreb	114.341,90	113.076,69	106.033,79	106.033,79	91.658,72	90.770,73	91.551,72	91.551,72
Splitsko-dalmatinska županija	13.262,59	13.229,10	15.749,33	15.747,96	13.262,59	13.249,67	13.262,59	13.247,73
Mesto Split	12.466,84	10.906,54	12.466,84	9.784,95	12.586,20	12.586,20	12.586,20	12.897,39
Primorsko-goranska županija	10.610,07	10.608,58	10.242,97	9.718,40	11.680,95	10.171,11	12.095,49	10.752,07
Mesto Poreč	1.061,00	1.061,00	1.061,00	1.061,00	1.061,00	0,00	742,70	0,00
Mesto Umag	265,25	265,25	1.259,94	1.259,94	663,12	0,00	663,12	663,12
Mesto Umag	265,25	265,25	1.259,94	1.259,94	663,12	0,00	663,12	663,12
Varaždinska županija	11.803,71	11.810,34	649,86	649,86	649,86	649,86	490,71	490,71

imajo.⁸ Iz analize besedil o aktivnostih svetov in predstavnikov slovenske manjšine na Hrvaškem pa je razvidno tudi, da članov ne obveščajo o pravicah, ki jih imajo (npr. osebna izkaznica v manjšinskem jeziku itn.).

Tu velja poudariti aktivnosti članov sveta Primorsko-goranske županije, kjer so vodilne osebe (tedanji predsedniki svetov) pred volitvami obiskali nekatere kraje, kjer ni bilo kandidatov, so pa bile razpisane volitve. Prav na ta način je leta 2015 nastal svet Občine Matulji (Mirković, 2015b, 16–17), leta 2019 pa svet Mesta Čabar (Simonič, 2019, 18). Sveta Primorsko-goranske županije in Mesta Reka pa sta bila pobudnika za uvedbo slovenskega jezika v osnovno šolo na Reki (Mirković, 2010a, 4) ter za pomoč za nakup učbenikov in didaktičnega gradiva za učenje slovenskega jezika po modelu C v Osnovni šoli Pećine. V zadnjem desetletju je prav zagotavljanje finančne podpore učenju slovenskega jezika, predvsem v večinskih hrvaških šolah, ena osnovnih dejavnosti svetov in predstavnikov na območjih, kjer pouk slovenskega jezika poteka.

Pomemben mejnik je tudi uvedba slovenščine v Osnovno šolo na Reki v šolskem letu 2010/2011, saj se od tega šolskega leta dalje predstavniki in sveti prizadevajo za možnost učenja maternega jezika (slovenskega) v hrvaških šolah po modelu C. Prav

zato tudi število učencev, ki se učijo slovenskega jezika, narašča (Riman & Novak Lukanović, 2021, 184–187). Nekateri predstavniki (Mesto Samobor, Mesto Varaždin) in sveti (Mesta Zagreb) so bili prav na podlagi tega pozitivnega primera pobudniki za uvedbo učenja slovenskega (maternega) jezika v osnovnih ali srednjih šolah. Treba pa je poudariti, da obstajajo tudi primeri, ko se je intenzivno delalo na uvedbi učenja maternega jezika v določene šole, a ravnatelji niso upoštevali prošenj svetov in te pravice nikoli niso bile uresničene. Čeprav so se sveti na to odzvali in o kršitvi obvestili tako ustanovitelje šol kot tudi samo ministrstvo, so se pobude komaj kdaj uresničile in se je le redko odražiralo v prid manjšinski skupnosti (Riman & Štiglic, 2023a).

Pomembno je poudariti, da sta bila prej omenjena sveta Primorsko-goranske županije in Mesta Reka tudi pobudnika uvedbe slovenščine v predšolske ustanove že v letu 2010 in 2011 (Mirković, 2010b, 7–8). Na podlagi te pobude se je decembra 2011 začelo s krajšim programom učenja slovenščine v enem od reških vrtcev. V naslednjem pedagoškem letu je izvajanje programa zamrlo, saj starši s to možnostjo niso bili ustrezno javno seznanjeni. Slovenska skupnost je leta 2016 ponovno sprožila aktivnosti za organizacijo učenja slovenskega jezika v vrtcih na Reki (Mirković, 2016, 4). Učenje slovenskega jezika,

⁸ Več o teh pravicah cf. Riman & Štiglic (2023b).

poimenovano »Igralne urice«, se je tako ponovno začelo marca 2017, a je program spet kmalu zamrl. Enaka pobuda je bila podana še v letu 2019 in 2020 (Šestan Kučić, 2020), a do končne realizacije ni prišlo. Na Hrvaškem tako ne obstaja možnost učenja slovenskega jezika v kateri od predšolskih državnih ustanov. To kaže tudi na nemoč predstavnikov in svetov, da bi uresničili pravice, ki jih ponuja Republika Hrvaška.

To ni osamljen primer, je pa dejstvo, da je med sveti in predstavniki slovenske manjšine na Hrvaškem in med kulturnimi društvi izjemno močna povezava, tudi zaradi vsega prej napisanega. Ker so člani slovenskih društev tudi pogosto člani svetov (in predstavniki), se pojavljajo v dvojnih vlogah. Ker so kultura, jezik in folklor med PSMH v primerjavi s političnim delovanjem bolj prisotni in že tradicionalni, je takšna smer delovanja opazna tudi za tu predstavljena politična telesa. Sklepamo lahko tudi, da slednja nimajo dovolj moči, znanja in podpore s strani Republike Hrvaške, da bi kršitve pravic PSMH preprečila in nekatere pravice na koncu tudi uresničila.

ZAKLJUČEK

Z vidika pripadnikov slovenske manjšine na Hrvaškem so predstavniki in sveti slovenske skupnosti na Hrvaškem del slovenskega (samo)organiziranja, na kar opozarjajo predvsem slovenski raziskovalci. Analiza dosedanjih podatkov kaže, da PSMH na manjšinskih volitvah ne izkoristijo priložnosti in ne zagotovijo kandidatov povsod, kjer jim to omogoča zakon. Leta 2023 je imela slovenska manjšina možnost izvolitve 35 predstavnikov ali svetov, dejansko pa so jih izvolili samo 18 in to predvsem na območjih, kjer obstajajo slovenska kulturna društva.

Ravno tako je izjemno nizka volilna udeležba PSMH. Na volitvah leta 2023 so na nekatera volišča prišla samo po dva pripadnika, ponekod pa volišč niso obiskali niti posamezniki, ki so na teh volitvah kandidirali (DVK, 2023b). Tudi to kaže na odnos PSMH do tu opisanih političnih teles in njihov neresen politični angažma. Dejstvo, da za izvolitev predstavnika manjšine ali člana sveta zadošča samo en glas, postavlja pod vprašaj tudi legitimnost izvoljenih predstavnikov. Tak odnos odpira vprašanje, kdo predstavlja slovensko manjšino na Hrvaškem ter ali so izvoljeni člani dejansko tudi najustreznejši kandidati za te funkcije. Prav zato je možno sklepati, da PSMH na svete in predstavnike slovenske manjšine ne gledajo kot na pomembna politična telesa, prek katerih bi lahko vplivali na izboljšanje njenega položaja, zato so tudi njihova pričakovanja v zvezi s tem nizka. Pravzaprav je položaj teh političnih teles za vse pripadnike manjšine na ravni celotne Hrvaške slab.

Eden od možnih razlogov za slabo vključevanje v to obliko organizacije je tudi zelo različna finančna podpora, ki so je deležni predstavniki in sveti, kar zagotovo vpliva na njihovo delovanje oziroma nedelovanje na tem področju. PSMH so tako pravzaprav nezainteresirani, da bi se vključevali in bili bolj aktivni. Na samo aktivnost verjetno vpliva tudi nevidnost teh političnih teles. Njihova prepoznavnost v večinskih medijih je nizka, manjšinski mediji pa o njih pišejo le, če uredniki uspejo pridobiti ustrezne informacije. Ker so manjšinski slovenski mediji predvsem regionalni, morajo PSMH spremljati prav vse, če želijo pridobiti objektivno sliko in zainteresirane posameznike seznaniti z vsem, kar je na voljo. Pogosto pa tudi sami PSMH sploh ne razlikujejo med delovanjem slovenskih društev in delovanjem svetov in predstavnikov slovenske manjšine na Hrvaškem.

Predstavniki in sveti slovenske manjšine na Hrvaškem s svojimi sicer redkimi aktivnostmi, v glavnem usmerjenimi v uveljavljanje manjšinskih pravic, delujejo predvsem v smeri ohranjanja slovenske kulture, nekoliko manj pa v smeri ohranjanja slovenskega jezika.

V prispevku je samo na kratko predstavljeno vsebinsko delovanje svetov in predstavnikov slovenske manjšine na Hrvaškem. Ta politična telesa v resnici zahtevajo poglobljeno analizo njihovih aktivnosti, ki bo pokazala, ali je razlog za slab interes PSMH za politično delovanje samo njihova geografska lokacija ali pa obstajajo tudi drugi razlogi, zakaj doslej ni bilo organiziranega delovanja, čeprav jim je bilo na volitvah to ponujeno.

Zaradi nezainteresiranosti PSMH, slabe medijske prepoznavnosti in drugih izzivov, s katerimi se srečujejo tako člani svetov kot tudi predstavniki, in to vseh manjšin na Hrvaškem, bi bilo izjemno pomembno opraviti »skeniranje« terena, da bi se ugotovilo, če obstajajo še kateri zunanji dejavniki, še neevidentirani razlogi za pomanjkanje kandidatov na manjšinskih volitvah. V tej smeri je pomembno razmišljati tudi zaradi dejstva, da v Krapinsko-zagorski županiji v letu 2023 manjšine niso predlagale niti enega kandidata za predstavnika ali člana sveta, pa so imele priložnost za to (DVK, 2023a).

Sklepamo lahko, da so slovenska kulturna društva, čeprav gre predvsem za institucije, ki negujejo slovenski jezik, slovensko kulturo in tradicionalne elemente slovenske kulture na Hrvaškem, vseeno izjemno pomembni dejavniki tudi pri vplivu in oblikovanju svetov in predstavnikov slovenske manjšine na Hrvaškem, pa tudi za njihovo delovanje. To vlogo jim je dal Ustavni zakon o pravima nacionalnih manjin, saj omogoča njihovo kandidiranje na volitvah. Društva so vsekakor še vedno pomembno jedro slovenstva, saj v krajih, kjer slovenskih društev ni, tudi ni kandidatov za volitve.

Ugotavljamo pa, da v krajih, kjer slovenska društva ne obstajajo ali je njihovo delovanje omejeno in niso dovolj močna, da s svojimi aktivnostmi pokrijejo celotno županijo (kadar v županiji deluje samo eno društvo), do ustanavljanja političnega telesa predstavnika ali sveta slovenske manjšine sploh ni prišlo. Ta pomembna povezava med slovenskimi društvi ter predstavniki in sveti slovenske manjšine na Hrvaškem je opazna že od prvih volitev leta 2003 oz. 2004, ko je tudi predsednik Zveze poudaril, da v nekaterih krajih ni bilo mogoče organiziranje zaradi neobstoja podatkov o posameznikih, ki so slovenskih korenin in ki bi lahko bili ustrezni kandidati. Od takrat do danes se situacija ni prav veliko spremenila. Tam, kjer obstaja kontinuirano delovanje svetov in predstavnikov, se bo to politično telo verjetno ohr-

nilo, vse dokler bodo obstajali pogoji, da se razpišejo volitve, torej dokler bo zadostno število PSMH.

Sveti in predstavniki slovenske skupnosti na Hrvaškem bi lahko imeli večjo vlogo, kot jo trenutno imajo. Pregled situacije v zadnjih dvajsetih letih je pokazal, da so PSMH precej nezainteresirani za udeležbo in delovanje kot člani svetov in predstavniki slovenske manjšine na Hrvaškem.

Možno je sklepati, da bi verjetno okrepitev (samo) organiziranja – ustanavljanje kulturnih društev, če bi bili PSMH za to zainteresirani – lahko vplivalo tudi na aktivnejše politično delovanje PSMH. Vsekakor je treba opraviti analizo vsesplošne situacije v teh krajih in oceniti, ali je za skromno politično in kulturno delovanje kriva nezainteresiranost članov skupnosti ali drugi dejavniki.

TWENTY YEARS OF ACTIVITY OF THE COUNCILS AND REPRESENTATIVES OF THE SLOVENE NATIONAL MINORITY IN CROATIA

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SUMMARY

The article analyses the activity of the councils and representatives of the Slovene minority in Croatia. Data analysis, sourced from official documents of the Croatian Government and media reports (including minority media), indicates that members of the Slovene minority in Croatia have not fully acknowledged the significance of these political bodies, which could potentially play a more prominent role in improving their position. Slovene minority members do not take advantage of all available opportunities and do not nominate candidates in all communities eligible under the law. Their lack of understanding or disinterest also reflects in low voter turnout, suggesting that they do not view Slovene minority councils and representatives as relevant political players through which they could improve their position. Other reasons are similar to those affecting other minorities, including varying (often very limited) financial support reliant on local authorities, lack of media attention for these political bodies, and lack of acknowledgment and recognition from local authorities. The study also revealed a strong correlation between Slovene societies and Slovene minority councils and representatives. Societies significantly influence the formation of these bodies. Thus, in communities where no Slovene societies exist, or their activities are limited and too weak to cover the entire county (e.g., when only one society operates in a county), no political body, whether a representative or a council, has been established.

Keywords: representatives and councils of the Slovene minority in Croatia, members of the Slovene minority in Croatia, Slovene societies, political participation of members of the Slovene minority in Croatia

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received: 2023-10-28

DOI 10.19233/ASHS.2024.35

THEMATIC EXPLORATION OF SLOVENIA'S PATH TO INDEPENDENCE IN SLOVENIAN SCOPUS-INDEXED HISTORY JOURNALS: A BIBLIOMETRIC AND SOCIOMETRIC ANALYSIS

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ABSTRACT

This article explores how Slovenian history journals have portrayed Slovenia's path to independence. The analysis of 3,759 articles and other journal contributions from 12 Scopus-indexed journals, using select digital humanities tools and methods, reveals that themes concerning Slovenia's path to independence, though less frequent overall, exhibit a dynamic pattern of regular occurrence, influenced by commemorations and special issues of journals. This suggests growing scholarly interest over time. The analysis identified four key thematic groups: Socio-cultural, Political, Religious, and Yugoslavia themes. Furthermore, metadata analysis indicates a balanced distribution of male and female first authors and equitable thematic accessibility across publication languages. These findings contribute to a nuanced understanding of how Slovenian Scopus-indexed history journals engage with this critical topic.

Keywords: bibliometric and sociometric analysis, digital humanities tools and methods, democratization processes, independent Slovenia, content analysis, thematic analysis of Slovenian history journals

ESPLORAZIONE TEMATICA DEL PERCORSO DELLA SLOVENIA VERSO L'INDIPENDENZA NELLE RIVISTE STORICHE SLOVENE INDEXATE SU SCOPUS: UN'ANALISI BIBLIOMETRICA E SOCIOMETRICA

SINTESI

Il presente lavoro analizza il modo in cui le riviste storiche slovene indicizzate nel database Scopus hanno rappresentato il percorso sloveno verso l'indipendenza. L'analisi di 3.759 articoli e altri contributi di 12 riviste indicizzate da Scopus, utilizzando strumenti e metodi scelti delle scienze umane digitali, rivela che i temi riguardanti il percorso della Slovenia verso l'indipendenza, sebbene meno frequenti in generale, mostrano un modello dinamico di ricorrenza regolare, influenzato dalle commemorazioni e dai numeri speciali delle riviste. L'analisi ha identificato quattro gruppi tematici chiave: argomenti socio-culturali, politici, religiosi e jugoslavi. Inoltre, l'analisi dei metadati mostra una distribuzione equilibrata dei primi autori, uomini e donne, e una copertura tematica uniforme nelle diverse lingue delle pubblicazioni. Questi risultati contribuiscono a una comprensione sfumata del modo in cui le riviste di storia slovene indicizzate in Scopus affrontano questo argomento critico.

Parole chiave: analisi bibliometrica e sociometrica, strumenti e metodi delle scienze umane digitali, processi di democratizzazione, Slovenia indipendente, analisi del contenuto, analisi tematica delle riviste storiche slovene

INTRODUCTION¹

Over three decades ago, Slovenia entered the defining stage of its transformative journey towards independence. This process, marked by the declaration of independence on June 25, 1991, and the subsequent Ten-Day War, culminated in the establishment of the independent Republic of Slovenia. It unfolded through multiple stages, intricately linked to democratic principles. Initially, critiques of the existing one-party political system emerged, reflecting a desire for a pluralistic political landscape. These sentiments evolved into tangible independence aspirations, expressed through active political engagement. Key milestones include the formulation of the Slovenian national program, impactful amendments to the constitution, the establishment of political parties, and the consequential democratic elections that marked a crucial chapter in Slovenia's pursuit of self-determination.

Since then, scholars have meticulously examined and documented Slovenia's pursuit of independence, with a rich array of scholarly works, conferences, and events contributing to a deeper understanding of this complex historical period.²

In this period, the role of Slovenian history journals in facilitating the exchange of scholarly insights about Slovenia's path to independence has been significant. The past two decades have witnessed considerable development in Slovenian academia, with 12 such history journals indexed in this time frame in the reputable international Scopus abstract and citation database. By becoming part of this database, journals showcase their scholarly excellence and contribute to a worldwide scholarly dialogue.³ In this context, the Scopus database is an essential gateway for Slovenian historiography to engage with the global academic community.

Utilizing select digital humanities tools and methods, our research addresses two primary research questions, with the initial inquiry focused on determining the number of Slovenian history journals indexed in the Scopus database in 2023. This initial investigation involves identifying the

number of such journals and quantifying the size of the cumulative corpus. Subsequently, through the analysis of the thematic field in journal article metadata, we employed a combined bibliometric and socio-humanistic approach to explore how themes related to Slovenia's path to independence coexist with other significant emergent themes within these journals.

Our research is based on two foundational assumptions:

1. Themes exist in articles as separate, specific, and distinctive entities, functioning in correspondence with other themes and supporting the core ideas of the articles within which they emerge.
2. Themes can be extracted from key elements of the publications, primarily titles, keywords, and abstracts.

By identifying key themes, thematic clusters, trends, and platforms regarding Slovenia's path to independence in Slovenian Scopus-indexed history journals, this interdisciplinary approach will contribute to a more nuanced and interconnected understanding of this pivotal moment in Slovenian history, enhancing the accuracy and depth of thematic analysis and offering valuable, previously unavailable bibliometric and sociometric insights.

METHODOLOGY AND SAMPLE

Our study is based on a bibliometric and sociometric analysis of a refined corpus of scholarly works published in domestic (Slovenian) periodical publications (journals) indexed in the Scopus database. Scopus is one of the most extensive and internationally recognized multidisciplinary abstract and citation databases, encompassing bibliographic data of articles, conference papers, monographs, patents, and other forms of scholarly production. Launched by Elsevier in 2004, leveraging advancements in digital technology, it is a crucial digital research tool for searching, analyzing, and tracking research worldwide. Its significance lies in its broad coverage across various

¹ This article was written in the framework of the research programme P6-0138 (A): *The past of north-eastern Slovenia among Slovenian historical lands and in interaction with the European neighbourhood*, project J6-4603: *Facing Foreigners Between the Medieval and Early Modern Period in the North Adriatic Towns*, and the programme core: *Heritage science and climate change: new research through an interdisciplinary approach and the use of artificial intelligence (AI)*, funded by the Slovenian Research and Innovation Agency (ARIS).

² For a more comprehensive understanding of the historical and scholarly perspectives on Slovenia's path to independence, the following monographs provide valuable insights cf. Bennett (1998); Drnovšek (1996); Fischer et al. (2005); Gabrič (2012); Hribar (2010); Jambreč (2014; 2018); Janša (2013); Lusa (2012); Meier (1996); Osojnik (2022a); Perovšek (2002); Pesek (2007; 2008; 2012); Pirjevec (1995; 2003); Ramet (2002; 2011); Repe (2001; 2002a; 2002b; 2003; 2004); Repe & Kerec (2017); Rupel (1992); and Valič Zver (2013). This list is by no means exhaustive. In recent years, several scholarly papers have been published that explore novel nuanced perspectives, several of which are presented in our analysis.

³ While the debate persists on whether Scopus represents the "gold standard," it is of the foremost global databases, granting access to discussions from Slovenian journals internationally.

Table 1: List of Slovenian Scopus-indexed History journals with source record ID, number of items, and % in the sample (Source: Own elaboration).

Title of the journal	Sourcerecord ID	Number of items (articles, notes, and reviews) in the sample	Total percent
<i>Acta Historiae Artis Slovenica</i>	19700180507	169	4.5 %
<i>Acta Histriae</i>	21100286403	566	15.1 %
<i>Annales, Series Historia et Sociologia</i>	5600155299	575	15.3 %
<i>Asian Studies</i>	21100780471	305	8.1 %
<i>Etnolog</i>	21100199530	495	13.2 %
<i>International Journal of Euro-Mediterranean Studies</i>	21100265696	71	1.9 %
<i>Kronika</i>	20768	298	7.9 %
<i>Prispevki za novejšo zgodovino</i>	19900192007	398	10.9 %
<i>Studia Historica Slovenica</i>	21100348975	536	14.3 %
<i>Zbornik za umetnostno zgodovino</i>	21100212328	106	2.8 %
<i>Zgodovina za vse</i>	21100789032	87	2.3 %
<i>Zgodovinski časopis</i>	23612	153	4.1 %
TOTAL		3,759	100 %

disciplines, providing researchers and industries access to the latest information and research.⁴ Scopus offers a comprehensive view of scholarly production, enables the measurement of research impact through citation indicators, and promotes collaboration and communication among researchers. As such, it contributes to advancing science and innovation, playing a vital role in the global scientific community ecosystem (Elsevier, 2023a). The choice of this database is justified not only by the facts highlighted in the introduction but also by the acknowledgment from the Slovenian Research and Innovation Agency (ARIS, formerly ARRS), which not only recognizes Scopus indexes in the quantitative assessment (scoring) of scholarly excellence but also assigns more (typically higher quality) points for publications in social sciences (code d) and humanities (code h) journals included in the database compared to publications in field-comparable journals that are not indexed in Scopus or the Web of Science⁵ (ARRS, 2023).

All Slovenian journals with the Scopus All Science Journal Classification Code (ASJC) 1202 - History – were considered. This code categorizes the journals within the larger field of Social Sciences and Humanities (Elsevier, 2023b). While some of these journals may also be included in other disciplinary categories, our analysis focuses explicitly on their classification under the History code.⁶ A two-step verification process was employed to determine their inclusion. Initially, we analyzed the Slovenian journal index report *Seznam slovenskih revij, ki so vključene v mednarodno bazo podatkov Scopus (h) 2023*, compiled annually by the Institute of Information Science (IZUM) in Maribor – the central information service for Slovenian science, culture, and education (IZUM, 2023). Twelve such journals were identified: *Acta Histriae*, *Acta Historiae Artis Slovenica*, *Annales, Series Historia et Sociologia*, *Asian Studies*, *Etnolog*, *International Journal of Euro-Mediterranean Studies*, *Kronika*, *Prispevki za novejšo zgodovino*, *Studia Historica Slovenica*, *Zbornik za umetnostno zgodovino*, *Zgodovina za vse* and *Zgodovinski časopis*.

⁴ Scopus also includes bibliographic data of relevant articles of indexed journals that predate the launch of the database.

⁵ The phrase “Web of Science” is often used synonymously with the Web of Science Core Collection database in academia. Web of Science is a research platform that provides access to the Core Collection, which itself combines several subbases or indexes. The Social Sciences Citation Index (SSCI) and the Arts & Humanities Citation Index (AHCI) are particularly important subbases for the social sciences and humanities.

⁶ It is noteworthy that while this approach ensures our analysis is centred on historical research within History journals, it is possible that some historical research might be published in journals without the 1202 code. Exploring such publications following the same methodology could be an interesting avenue for future research.

However, since IZUM extracts bibliometric data directly from the database provider, in this case, from Elsevier, we conducted a second verification step to confirm the inclusion of Slovenian journals there. Each journal selected for indexation in the Scopus database undergoes a rigorous process and is assigned a journal code or Sourcerecord ID. The analysis showed that all Slovenian journals identified in the first step possess such a signature (cf. Table 1).

The corpus of journal contributions consists of 3,978 items. These are categorized into six types: articles, review items, reviews (which in Slovenian encompass both review articles and reviews of books and other scholarly works), notes, conference papers, and short surveys. We further refined this corpus by removing book reviews, conference contributions, and short surveys. Given that Slovenia's path to independence spanned roughly the 1980s and early 1990s, we limited our study to the time frame from 1990 to 2022. Publications from 2023 were excluded from the study since numerous volumes of the selected journals have yet to be published or are awaiting indexing in the Scopus database at the time of the conducting of this study. The final version of the refined corpus consists of 3,759 items, distributed across journals as depicted in Table 1.

Employing categorization models (*dictionaries*), we applied content analysis, a classical qualitative research method, to reduce and analyze material. The roots of the modern approach can be traced back to the mid-twentieth century (Berelson, 1952), and numerous contemporary and specialized versions have been developed since then (Flick, 2014; Drisko & Maschi, 2016). We followed Krippendorff's conception (2013, in: Drisko & Maschi, 2016, 2), defining content analysis as a "research technique for creating replicable and valid inferences tied to texts (or other forms of relevant material) and the contexts of their use." This conception enables analysis beyond the manifest level of the text, offering other advantages. This approach is suitable because it allows the analysis of a broad range of textual material, a high level of independence from source (Bauer, 2000), and the formulation or adaptation of a categorization model enabling thematic analysis of a large amount of collected material (Flick, 2014).

Our approach is based on that of Naterer and Efendić (2022), who demonstrated the potential and strengths of content analysis in their meticulous analysis of 1,707

articles from four representative Slovenian history journals, spanning the period from 2009 to 2021. Employing content analysis, they outlined 18 distinct thematic clusters in Slovenian history, organized into four main categories: National topics, Military topics, Local topics, and Church-biographical topics. Their findings underscored anthropology's integral role in exploring Slovenian history. Given the alignment of their research question, sample selection, and analytical methodology with our own, we recognized their approach as well-suited for informing our research objective.

To achieve the research objective, the content analysis process was based on the following protocol:

1. Formulation of specific research questions.
2. Selection of relevant textual material and sources from the Scopus database (1996–2022; no relevant indexed sources found for 1990–1995).
3. Formation of the initial categorization model – the initial model was designed for data capture and defined key parameters for analysis: journal title, year of publication, issue number, article title, name and surname of author/authors, gender of the first author,⁷ author's affiliation, author's area of specialization, country of author's affiliation, publication classification (original research article, review article, professional article), author keywords (English), and abstract (English).
4. Segmentation of collected data according to the initial categorization model.⁸

Analysis of collected data was performed using a purposely built analytical categorization model or dictionary and included three levels: title of the article, author keywords, and abstract⁹. The model was developed through the following steps:

- a. Review of the frequency distribution of phrases comprising 2 to 5 words with a minimum frequency of 3 occurrences in the text (these phrases were used to build initial structure of the categorization model – the initial model had 379 keywords).
- b. Review of the frequency distribution of all relevant words (these words were used in a two-step refinement process – the final categorization model had 1,127 keywords).
- c. Review of the frequency distribution of main themes (initial review of topics using *topic modelling*).

⁷ We focused our analysis of gender aspects solely on the first author, assuming that the first author has the majority of the control over the article's topic, content, and structure.

⁸ Dissection is an essential step in analyzing extensive material, as it allows for a clearer, more focused, and faster analysis of content. The dissection involved segmenting the structural parts of entire texts into separate sections of a specially designed table (a section in the text containing the author's keywords was relocated to a separate Keywords section, the Abstract section was moved from the entire text to a separate Abstract section, and so forth).

⁹ Here it is important to note that while the included sample was complete on the title and author keywords levels, there were 382 (10.1%) items missing on the level of abstracts. These items were not available in any format and from any database and are considered missing values within our analysis.

Table 2: Structure of the categorization model with examples of keywords (Source: Own elaboration).

Thematic category ¹²	Examples of keywords
Independent Slovenia ¹³	attainment_of_independence, independent_slovenia, neodvisnosti, samostojnosti, slovenia_s_independence slovenian_independence
Economic themes	davčni, davek, economic, econometric, ekonomia, economic, economica, economical, economically, economico, economics, economic_activities...
Yugoslavia themes	Federal_Republic_of_Yugoslavia, Jugonostalgicnimi, Jugoslave, Jugoslavenske, Yugoslavia
Social themes	družbeni, družbenih, družbeno, družbenokritičnega, družbenopolitične, družbenosti, družbi, družbo, družboslovne, social, society, local_identity, local_level, local_people
Cultural themes	cultural, cultural_activities, cultural_and_historical, cultural_and_linguistic, cultural_and_political, cultural_and_social, cultural_context, cultural_heritage, cultural_history, cultural_identity, cultural_institutions, cultural_landscape, cultural_life, cultural_memory, kulturno, kultura, kultur
Political themes	politics, politikita, foreign_affairs, foreign_minister foreign_policy, human_rights, ideological_and_political, ideological_political, intelligence_service, intelligence_services, internal_affairs, internal_political, international_community, international_law, komunista, komunisti
Biographical themes	Anton_Korošec, Anton_Martin_Slomšek, Jože_Plecnik, Avguštin_Stegenšek, Boris_Pahor, Edo_Mihevc, Edvard_Kardelj
Educational themes	high_school, higher_education, history_textbooks, izobrazba, izobraziti, izobraževalnega, pouk, izobraževalnem, education, school
Ethnic themes	emigrations, emigrazione, ethnic, ethnically_mixed, ethnic_groups, ethnic_identity, ethnic_territory, ethnographic_museum, etnica
European themes	Europe, europea, european, europeanisation, europeanism, europeanization, europeans, european_context, European_countries, European_integration, European_union
War and Military themes	armada, armed, armed_forces, armee, armies, armija, arming, armoured, army, military, war, JNA, Jugoslovanska narodna armija, JL, Jugoslovanska ljudska armada
Church and Religious themes	catholic_church, catholic_church_in_Slovenia, catholic_political, catholic_side, christian_social, church, churches, church_architecture
Law and Justice	court, criminal_justice, criminal_law, criminal_offences, criminal_proceedings, judicial_proceedings, judicial_system, justice, sodišče
Intelligence and Security	intelligence_service, kgb, sabotage, sabotages, intelligence_services, SS, UDBA, state_security

Field-specific words, phrases, and themes were used to build the analytical categorization model¹⁰ enabling the location of main themes and their components, as well as mapping the disciplinary field through an analysis of

their connections (link analysis).¹¹ The final version of the analytical categorization model included 1,127 specific keywords used for thematic mapping categorized into 14 themes or thematic categories (see Table 2).

10 A categorization model (also known as a categorization dictionary or dictionary) is a model that includes words, phrases, and expressions extracted from textual material and are understood in relation to the material's content as keywords. These keywords are categorized according to the theoretical framework, research goals, or other relevant criteria (co-occurrence factors). Such a categorization model enables (1) the reduction of collected material, (2) the quantification of qualitative content, and (3) statistical analysis.

11 In bibliometric studies, researchers are not necessarily required to adopt a predefined categorization model. This flexibility allows for more tailored approaches to analyzing publication trends, as seen in the study on Slovenian diplomatic studies by Udovič, Brglez & Arbeiter titled "Kdo (kaj) piše o/v slovenskih diplomatskih študijah?: primerjalna analiza izbranih slovenskih znanstvenih revij" (2021). Rather than embedding publications into preset categories, the authors examined articles across select Slovenian journals, analyzing the scope and frequency of topics related to Slovenian diplomatic studies. Their use of the COBISS+ database to extract publications with keywords like "diplomac*" and "diplomat*" reflects a pragmatic, data-driven approach to corpus selection.

12 Also referred to in this study as themes.

13 The thematic category Independent Slovenia within this analysis encompasses the entire historical path leading to the establishment of the Republic of Slovenia. This includes, but is not limited to, pre-independence movements and aspirations, relevant political developments during the dissolution of Yugoslavia, and the declaration of independence and its aftermath.

The sample consisted of 2,473 (65.8%) original articles, 1,230 (32.7%) review articles, and 56 (1.5%) notes (commentary or discussion on a specific topic), distributed over time as depicted in Chart 1.

Analyzing the sample structure over time reveals a notable increase in the number of articles published in Scopus-indexed journals, particularly from 2005 onwards. This increase can be primarily attributed to the consistent growth in the number of Slovenian history journals indexed in Scopus following the establishment of the database in 2004. Additionally, the overall surge in year-on-year scholarly production across various disciplines may have also been contributing to this trend since (Powell & Dusdal, 2017). These observations suggest a positive correlation between the expansion of Slovenian-indexed journals and overall scholarly output. It reflects a dynamic and evolving academic disciplinary landscape, highlighting the increasing prominence of Slovenian historical research in the global scholarly community relative to the size of Slovenia.

ANALYSIS OF THE THEMATIC FIELD

The first step in our analysis of the thematic field involved cluster analysis of themes extracted from the sample using a purposefully developed categorization model. We opted for a clustering method based on keyword co-occurrence profiles

(second-order clustering) when deciding the clustering type. In contrast to the method using direct keyword co-occurrence (first-order clustering), this approach considers co-occurrence not only because the keywords directly co-occur but also because they both occur in similar contexts. We chose this method because of the specific focus of our research question – the thematic category Independent Slovenia. This approach allowed us to consider semantically related words that often appear in alternating forms, such as synonymous keywords like “neodvisnost”, “samostojnost”, or “odcepitev”, all indicating the process of gaining independence. The cluster analysis is presented in Chart 2.

Chart 2 presents the frequency of themes (bars on the left) and their clustering within the analyzed sample (dendrogram on the right). Political, War and Military, Ethnic, Social, and Cultural themes are the most frequent. These dominant themes form the core of four key clusters or thematic groups:

1. *Socio-cultural cluster* (blue): This cluster is characterized by thematic pairs like (1) Social and European, (2) Cultural and Educational, and (3) Economic and Legislative, with an association of Ethnic themes.
2. *Political cluster* (green): This cluster centers on themes of Politics, and War and Military, with an association to Independent Slovenia.

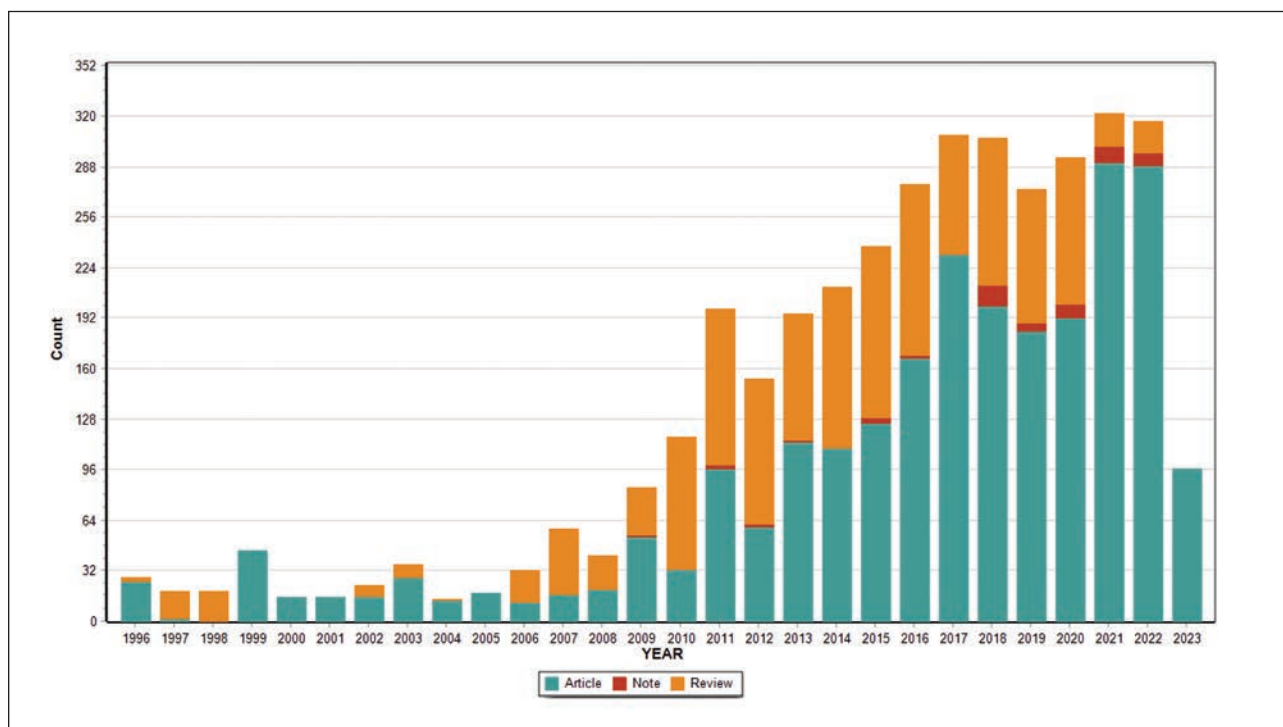


Chart 1: Sample structure over time (Source: Own elaboration).

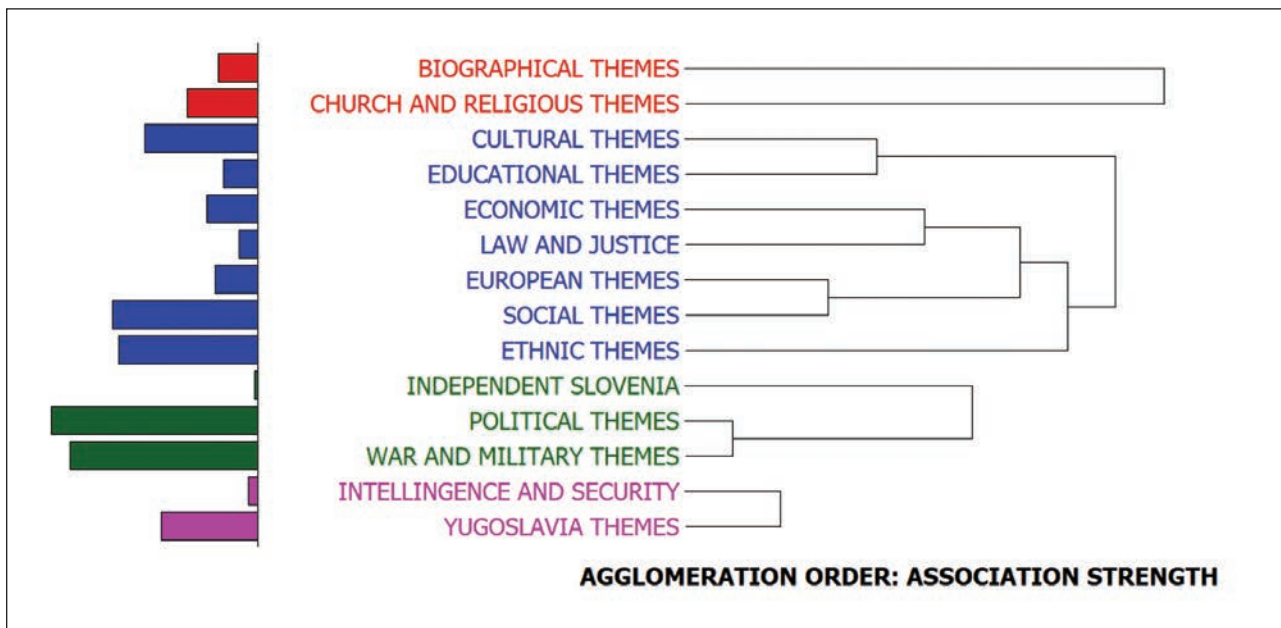


Chart 2: Cluster analysis of the sample (Source: Own elaboration).

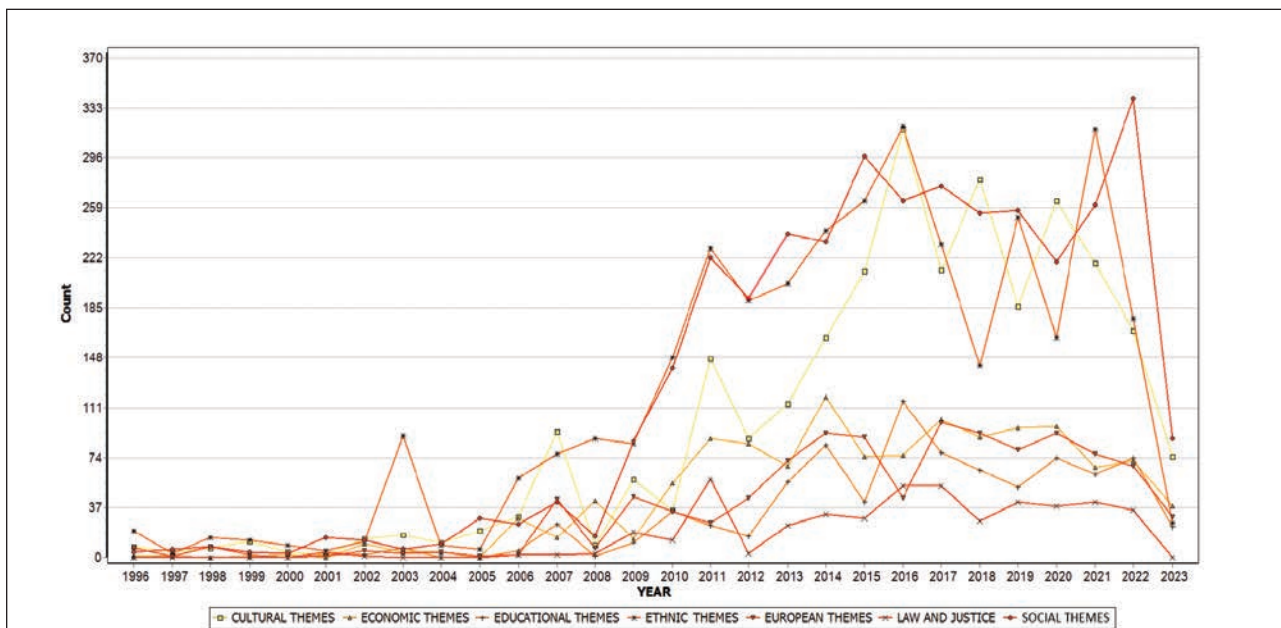


Chart 3: Socio-cultural cluster in time perspective (Source: Own elaboration).

3. *Religious cluster* (red): This cluster focuses on Church and Religious, and Biographical themes.
4. *Yugoslav cluster* (purple): encompassing Yugoslavia themes and Intelligence and Security themes.

To assess the stability of these thematic clusters beyond their frequencies, we analyzed their presence within the sample over time. Guided by the

assumption that themes present over an extended period could be considered core themes, we evaluated the thematic stability of the sample.

Chart 3 illustrates Cultural, Economic, Educational, Ethnic, European, Law and Justice, and Social themes from 1996 to 2023. A modest but discernible upward trend for all themes becomes evident starting in 2005, with the first significant boost occurring from

2008 to 2011. This trend is particularly pronounced in Social, Ethnic, and Cultural themes, although it extends to other thematic categories to a lesser extent. The increase can be attributed primarily to growth in the number of Slovenian journals indexed in Scopus during that period. The trend reached its first peak in 2015 and 2016, when social, cultural, and ethnic themes significantly surged, creating a distinct division from other themes within this group. A second peak occurred in 2021 and 2022 when Social and Ethnic themes increased again in several journals. For example, *Prispevki za novejšo zgodovino* (2021, issue 3) issued a special thematic edition dedicated to social, cultural, and ethnic aspects of diseases. The following year saw another special thematic issue of the same journal, focusing on the social, cultural, and ethnic aspects of media and journalism in Socialist Yugoslavia. In 2022, a cluster of articles in *Annales, Series Historia et Sociologia* (2022, issue 4) concentrated on the social-cultural dynamics and social politics of the Habsburg Empire, the Austro-Hungarian Empire, and the upper Adriatic region, contributing to the spike in these themes. These results show that Social, Cultural, and Ethnic themes are crucial pillars of stability for this thematic cluster due to their high frequency and continuous and increasing presence. The driving forces behind this trend are journals with a permanent focus on these topics, such as *Etnolog* (2023), and thematic issues of various journals.

Chart 4 illustrates Political themes, War and Military themes, and Independent Slovenia themes from 1996 to 2023. Political and War and Military themes slightly increased in 2002 and 2003, but the trend gained significant momentum in 2006. The initial peak is linked to War and Military themes in 2009, followed by two peaks of Political themes in 2011 and 2014. Two subsequent peaks emerge, one related to War and Military themes in 2015 and another regarding Political themes in 2017. An analysis of the trends in War and Military themes suggests that this increase can be largely explained by two thematic issues of *Studia Historica Slovenica* (issues 2 and 3 in 2017) focusing on World War I. The occurrence of articles including War and Military themes in regular issues of *Acta Histriae* and *Prispevki za novejšo zgodovino* also contributes to this pattern. A similar situation explains the peak of Political themes in 2017 when *Annales, Series Historia et Sociologia* dedicated three out of four issues to political questions (issues 2, 3, and 4). In other journals, Political themes emerge within regular issues. After that, the general trend manifests a slight decrease in both significant themes within this group. The chart also shows Independent Slovenia themes as peripheral yet continuously present. There are slight increases in 2007, 2012, 2016, and 2022, but beyond these, there are no apparent peaks in the trend, pointing to the conclusion of the relative continuity and stability of

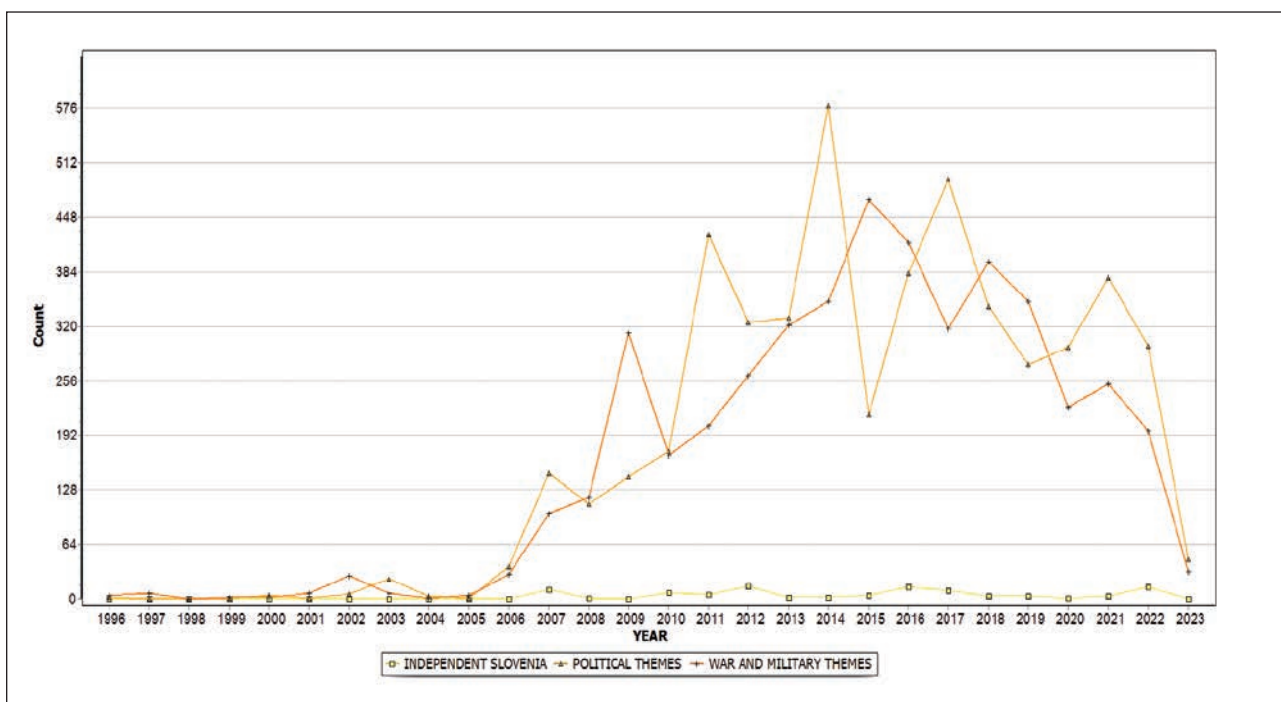


Chart 4: Political cluster in time perspective (Source: Own elaboration).

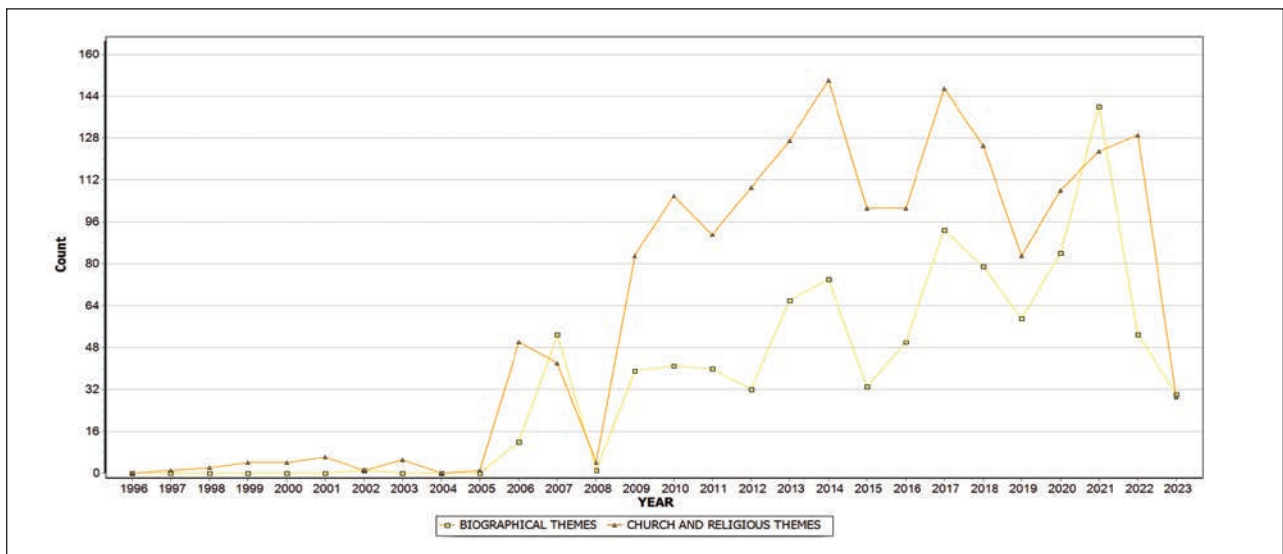


Chart 5: Religious cluster in time perspective (Source: Own elaboration).

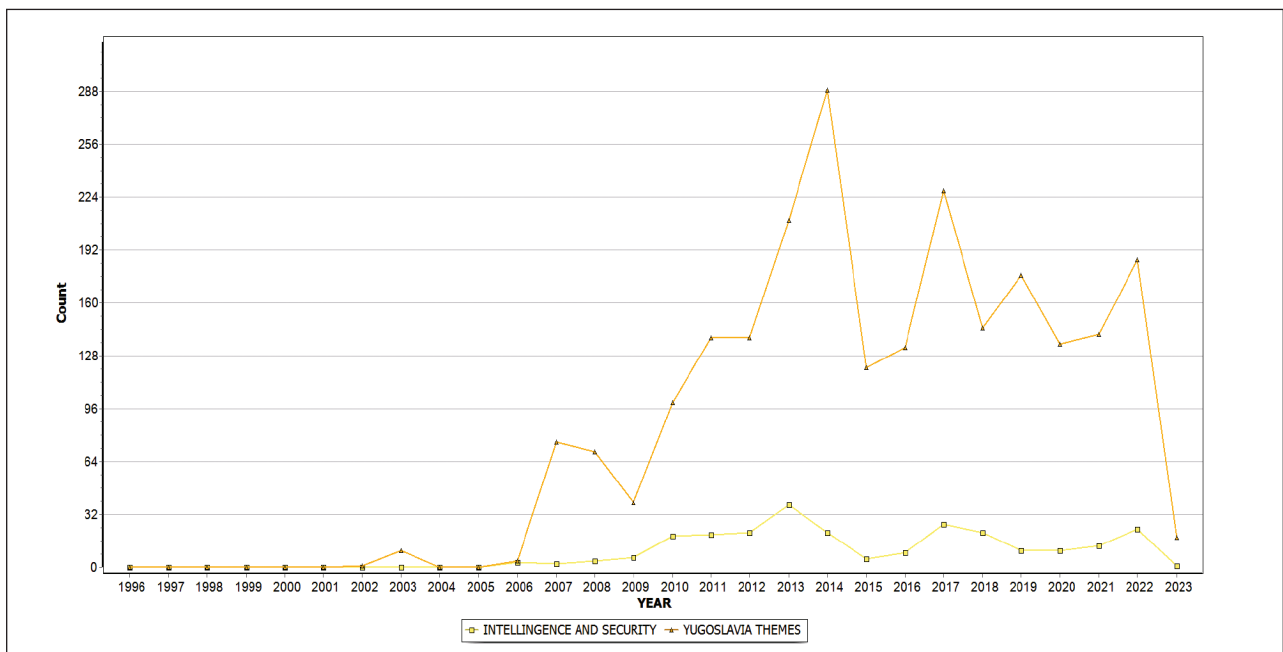


Chart 6: Yugoslavia cluster in time perspective (Source: Own elaboration).

the theme. Several important factors should be considered when explaining these trends, above all, the 20th anniversary of Slovenia's independence and the subsequent increase of academic interest and thematic issues intended to commemorate this occasion.

Chart 5 presents Biographical, and Church and Religious themes from 1996 until 2023. There is a clear increasing trend for these themes in 2005, lasting until 2007 when a significant drop occurred.

The trend resumed with a substantial increase in 2009 and 2010. A 2009 symposium organized by the Franc Kovačič Historical Society and the Faculty of Arts, University of Maribor, can explain this. The symposium was dedicated to the Slovenian bishop Anton Martin Slomšek, resulting in subsequent relevant publications in 2009 and 2010. Similar circumstances also contributed to the peak of these themes in 2014, when the same organizers held a symposium on cities, with several articles focusing

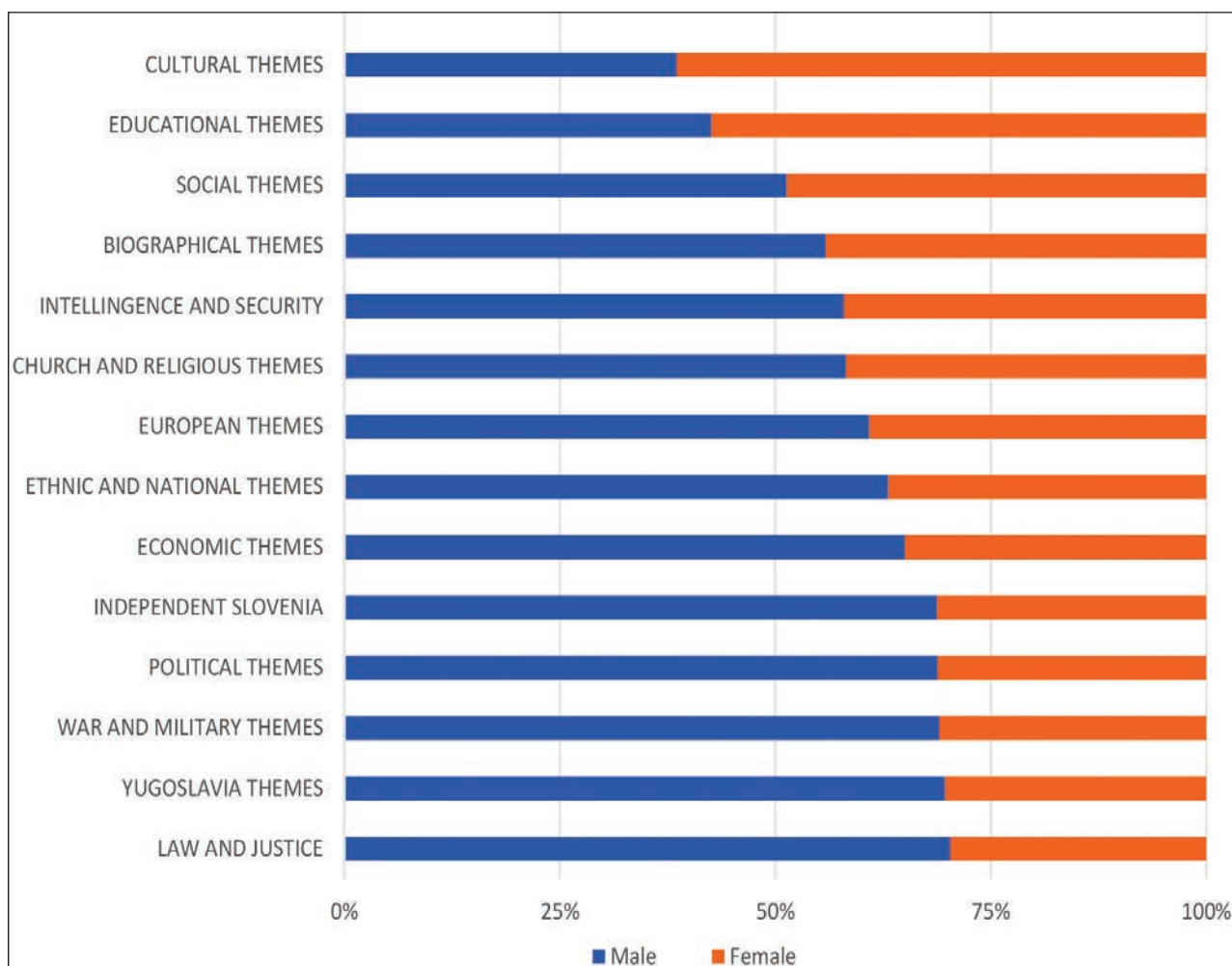


Chart 8: Composition of themes regarding first author's gender (Source: Own elaboration).

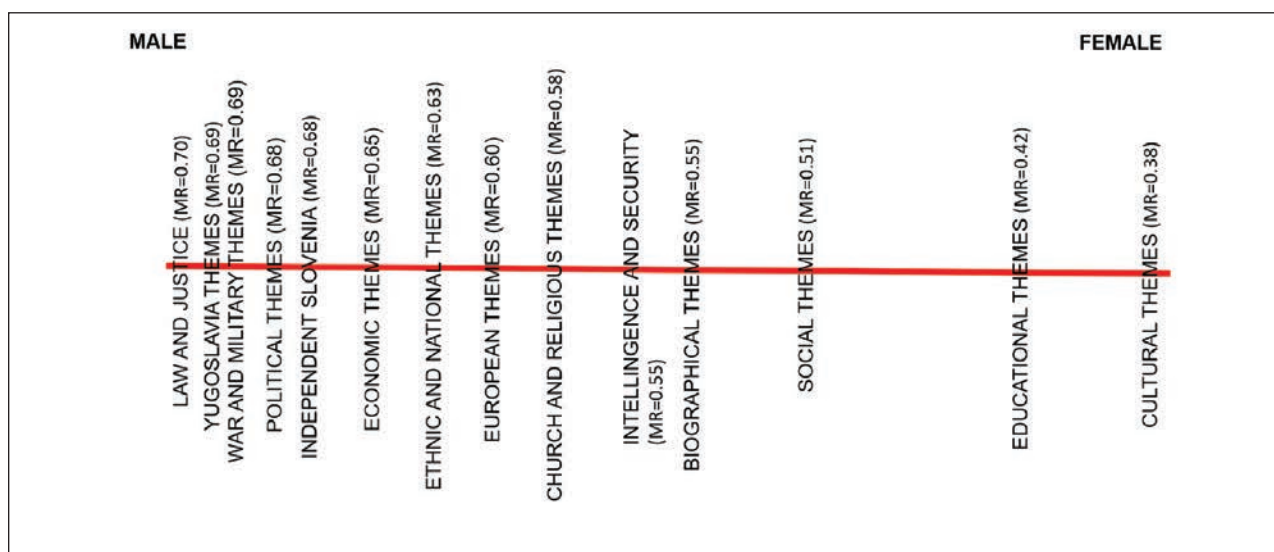


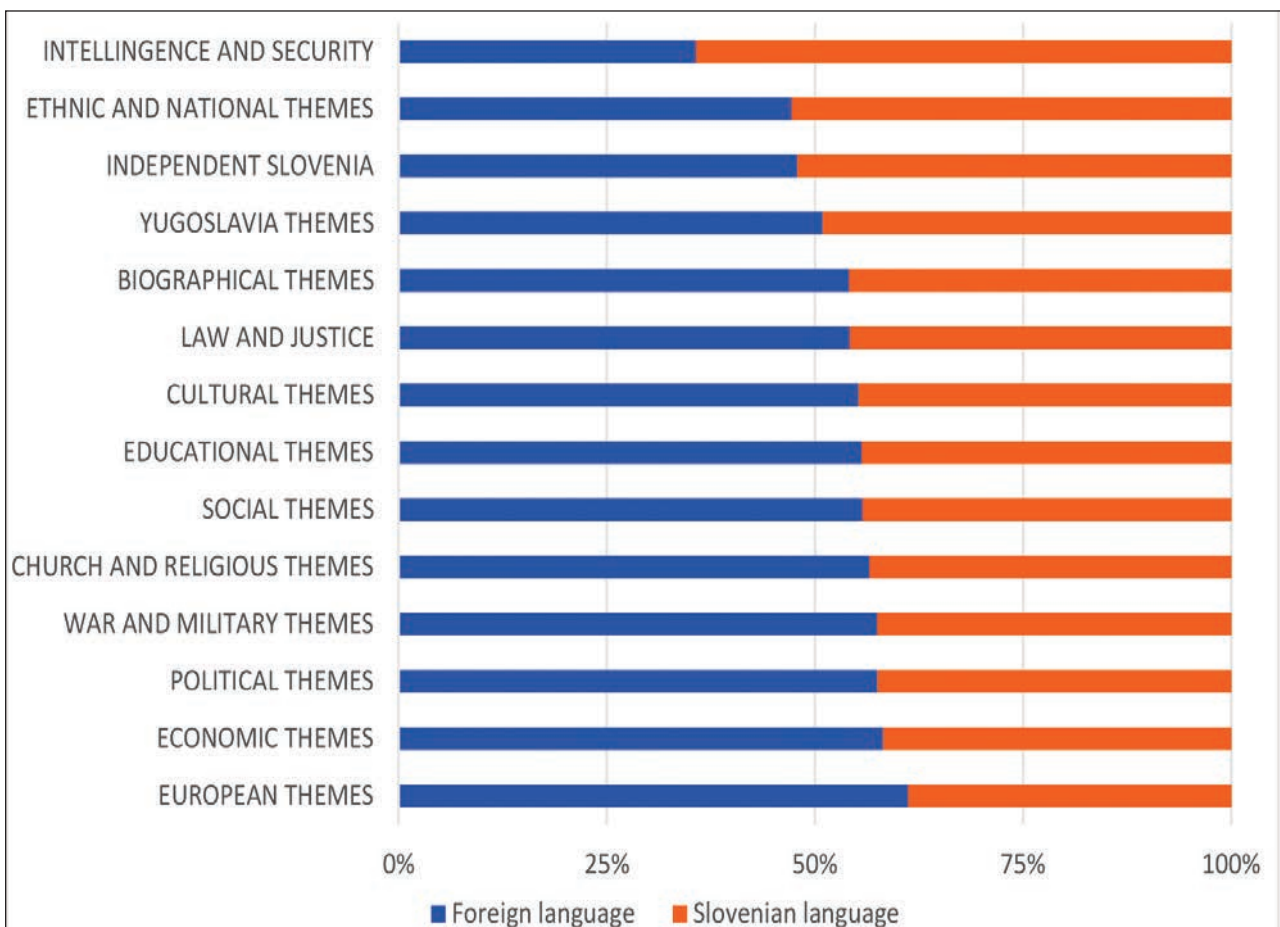
Chart 9: Multiple correspondence analysis of themes in the gender (male-female) space (Source: Own elaboration).

Table 3: Language of the sample (Source: Own elaboration).

Value	Frequency	Total percent
Slovenian	1,702	45.30%
English	1,691	45.00%
Italian	157	4.20%
Slovak	61	1.60%
German	50	1.30%
Bosnian	42	1.10%
Croatian	21	0.60%
Czech	18	0.50%
French	6	0.20%
Spanish	3	0.10%
Japanese	3	0.10%
Polish	2	0.10%
Korean	1	0.00%
Chinese	1	0.00%
Turkish	1	0.00%

Chart 8 illustrates the composition of themes regarding the gender of the first author. The results reveal different shares of male and female first authors across all themes, with Cultural themes being predominantly authored by female scholars on one end of the spectrum and Law and Justice being dominated by male authors on the other.

To investigate the potential existence of typically “male” and “female” themes, we conducted a multiple correspondence analysis based on the “masculinity” level of themes. Chart 9 depicts the positioning of themes in a two-dimensional space representing the first author’s gender. The results indicate that themes more closely associated with male authors include Law and Justice, Yugoslavia, War and Military, Politics, and Independent Slovenia. Economic, Ethnic, and European themes also show a predominant association with male authors. On the opposite end of the spectrum are Cultural themes, closely followed by Educational themes, which female authors more often examine. Social themes appear to be the most balanced in terms of gender association.

**Chart 10: Composition of themes with regards to items language (Source: Own elaboration).**

Another crucial aspect of our investigation of the thematic field is the reach of the themes. Articles within our sample were written in 15 different languages, with Slovenian (45.30%) and English (45%) being predominant (see Table 3).

The language composition of our sample is wide-ranging; however, it raises a question about the accessibility of the content to Slovenian-speaking and international audiences. To explore this issue, we (1) categorized all languages used into two groups, Slovenian and foreign, and (2) analyzed the composition of thematic categories regarding these two dimensions.

Chart 10 illustrates the language composition of themes, and it is evident that all themes have a particular share of both Slovenian and foreign languages, indicating the degree to which these themes are accessible to different audiences. On one end of the spectrum, Intelligence and Security themes are predominant in Slovenian, thus making them more accessible to the domestic audience. On the other side of the spectrum, European themes usually emerge in a foreign language, predominantly English; as such, they are more accessible to an international audience. To outline this kind of accessibility, we conducted a multiple correspondence analysis based on the calculated level of internationalization (see Chart 11).

Chart 11 shows the placement of themes in a two-dimensional space, where one end of the spectrum indicates the international (left), and the other represents the national space (right). Results show that European themes have the highest language accessibility, followed by Economic, Political, War and Military, and Church and Religious themes. Themes of Intelligence and Security are mainly accessible to Slovenian-speaking audience, followed by Ethnic themes and Independent Slovenia themes. Concerning language, themes that are relatively

equally accessible to both Slovenian-speaking and international audiences are those tied to Yugoslavia, followed by Biographical themes, Law and Justice, and Social, Cultural, and Educational themes.

INDEPENDENT SLOVENIA THEMES

The following section will focus on Independent Slovenia themes. Having already outlined the frequency of the themes and their position in the Political cluster, we decided to analyze the presence of these themes over time to assess their longitudinal stability (see Chart 12).

Chart 12 depicts a dynamic trend of the themes from 2006 until 2023. The trend remained dormant up until the first peak in 2007. The prominence of this peak can be largely attributed to the contributions made within the 2007 special issue of the journal *Studia Historica Slovenica*, which was dedicated to Slovenia's path to independence. Following a profound fall in 2008 and 2009, there was a slight increase in these themes in 2010 and a stronger one in 2012. Several factors contribute to this trend. Firstly, this period coincides with the 20th anniversary of Slovenia's independence, resulting in increased interest among authors across the spectrum in these themes. We also witnessed a rise in relevant publications. Additionally, there was an increase in special issues dedicated to these themes. For example, in 2012, there was a double-volume thematic issue of *Studia Historica Slovenica* (issues 1–2), with contributions covering Slovenia's path to independence. After a sharp decline in 2013 and 2014, these themes peaked again in 2016. Several factors influenced this event; among them, a special issue of *Prispevki za novejšo zgodovino* (issue 3) titled "Quarter of a Century," contributed the most. In the words of the special issue's editors, Gašparič & Šorn (2016, 7):

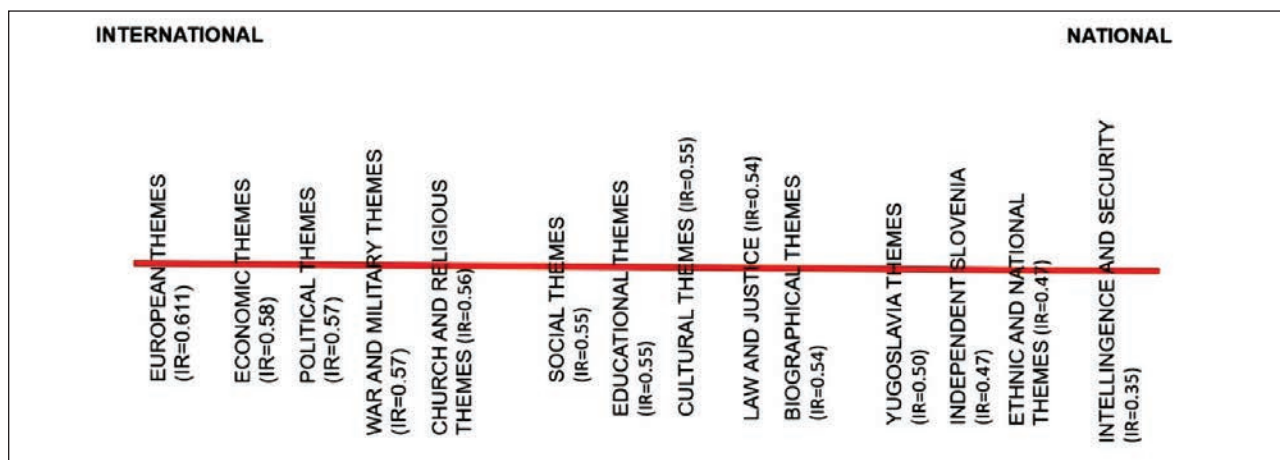


Chart 11: Multiple correspondence analysis of themes in the national-international space (Source: Own elaboration).

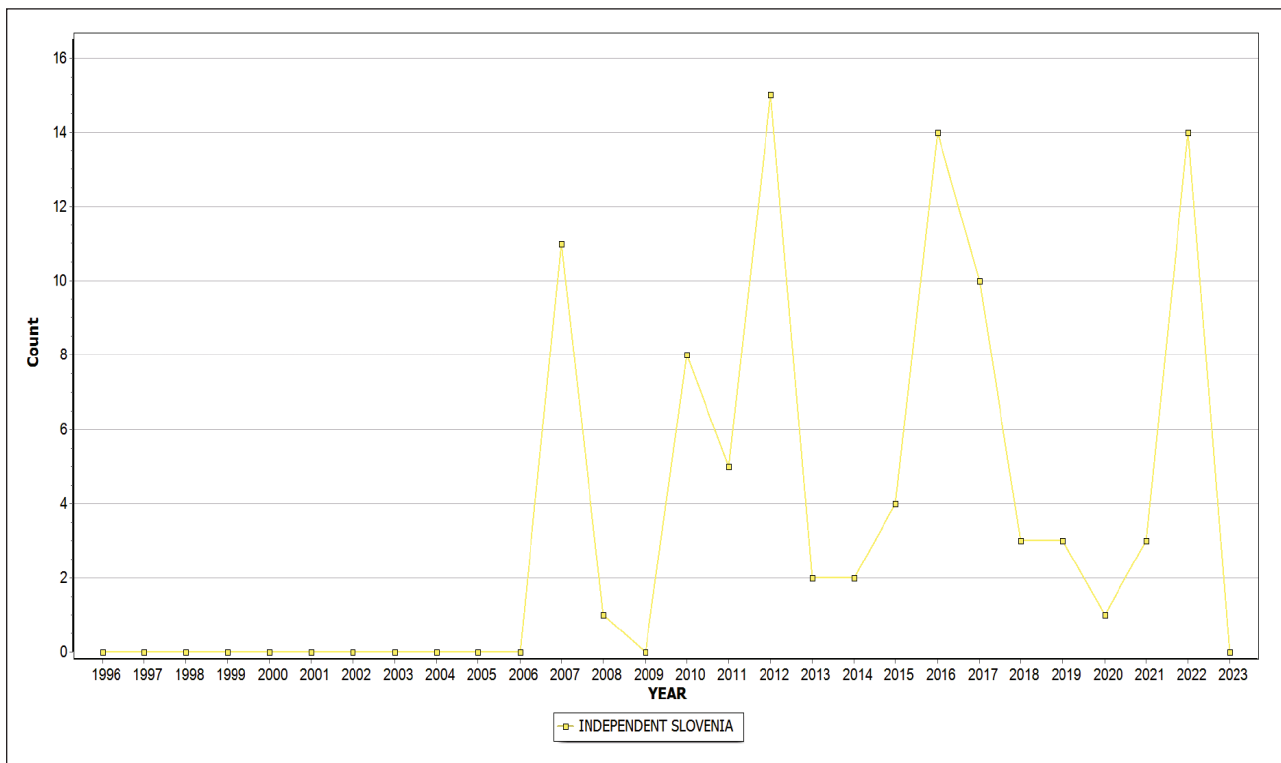


Chart 12: Independent Slovenia themes over time (Source: Own elaboration).

For many, the quarter of a century of the Republic of Slovenia (1991–2016) is a relative concept. Some do not think that the anniversary is anything special, others do not want to celebrate it at all at this time due to the many wasted opportunities, while the rest would like to honour the memory of the 25 years since the establishment of the state very conscientiously. The anniversary is also relative for historians and the Slovenian historiography: on the one hand the year 2016 does not represent any significant milestone in history, while on the other hand 25 years of the independent Slovenian state certainly encourages us to start facing the research challenges posed by this period more actively. There are many reasons for this – apart from the aforementioned anniversary.

Once again, a deep fall occurred, lasting from 2018 until 2021, followed by another sharp increase in 2022. Following the already established pattern of this trend, we can interpret the spike similarly. 2021 marked the 30th anniversary of Slovenia's independence, with numerous articles and thematic journal issues in our sample dedicated to the event. While some were published in 2021, a significant portion

appeared in the following year. In addition, several commemorative academic events, like the thematic symposium organized by the Franc Kovačič Historical Society at the University of Maribor added to the increasing dynamics of these themes in publications.

In addition to time-related analysis, we narrowed our focus on the relationship of these themes to other themes within the thematic field. We developed a proximity plot of all extracted themes concerning the themes of Independent Slovenia as depicted in Chart 13.

Chart 13 shows War and Military, Politics, Yugoslavia, and Ethnic themes to be close to the themes of Independent Slovenia, in contrast to themes related to Culture, Education, and Church and Religious themes. This confirms the findings in Chart 2 and suggests an inter-thematic relationship between these themes.

To analyze these relations, we performed link analysis on the thematic neighborhood of the themes of Independent Slovenia themes, using multidimensional scaling (see Chart 14). Link analysis presented in Chart 14 reveals several significant findings. Firstly, the themes of Independent Slovenia are closely related to other themes within the Political cluster, supported by a relatively high co-occurrence factor and closeness within a multidimensional space. Secondly, Independent Slovenia

themes are related to the Socio-cultural cluster (blue) and Yugoslav cluster (pink), making them an essential functional connection between other themes and thematic groups. Thirdly, relatively high co-occurrence between themes from different thematic groups indicates that themes of Independent Slovenia are an integral part of bi-thematic and multi-thematic articles.

Bi- and multi-thematic articles incorporate various themes that work in tandem to reinforce the central argument. To illustrate the former, we highlight four examples. The first demonstrates the interplay between the themes of Independent Slovenia and War and Military, both integral components of the Political cluster. Tomaž Kladnik's "Patriotism and the Slovenian Army" (2014) examines the decisive measures taken by General Maister at the end of World War I. Kladnik associates these historical events, almost a century old, with the formation of the armed forces and military activities during the Ten-Day War. He also discusses the transformation of the Slovenian Territorial Defence from a second-class reserve army (Kladnik, 2014, 244). Kladnik's "Maribor in nastanek oboroženih sil samostojne in demokratične Slovenije" (2022), is another example. Further exploring wartime dynamics, Kladnik

describes the situation in the town of Maribor, where the armed forces were established based on republican regulations while also considering the specificities of the broader local community.

Several bi-thematic articles center on Slovenia's transition from being a part of Yugoslavia to becoming an independent state. Notable examples of these interconnected themes are found in "We told the truth about Yugoslavia...: Slovenian (para) diplomats in 1990–1992" by Boštjan Udovič (2017) and "Osamosvojitve držav in "pozaba" zgodovinskih dosežkov: primer ne-nadaljevanja gospodarske diplomacije Jugoslavije v Sloveniji in Črni gori po njuni osamosvojitvi" by Boštjan Udovič & Danijela Vojinović Jačimović (2019). In the former, Udovič examines the establishment of an independent diplomatic apparatus for the Republic of Slovenia, aiming to "shed light on the role of Slovenian paradiplomats (particularly business representatives) in the country's independence process, as well as highlight the importance of diplomats who worked in the Yugoslav service and helped lay the foundations for the diplomacy of independent Slovenia" (Udovič, 2017, 713). In the latter, the authors investigate the (dis)continuation of the Yugoslav commercial diplomacy in Slovenia

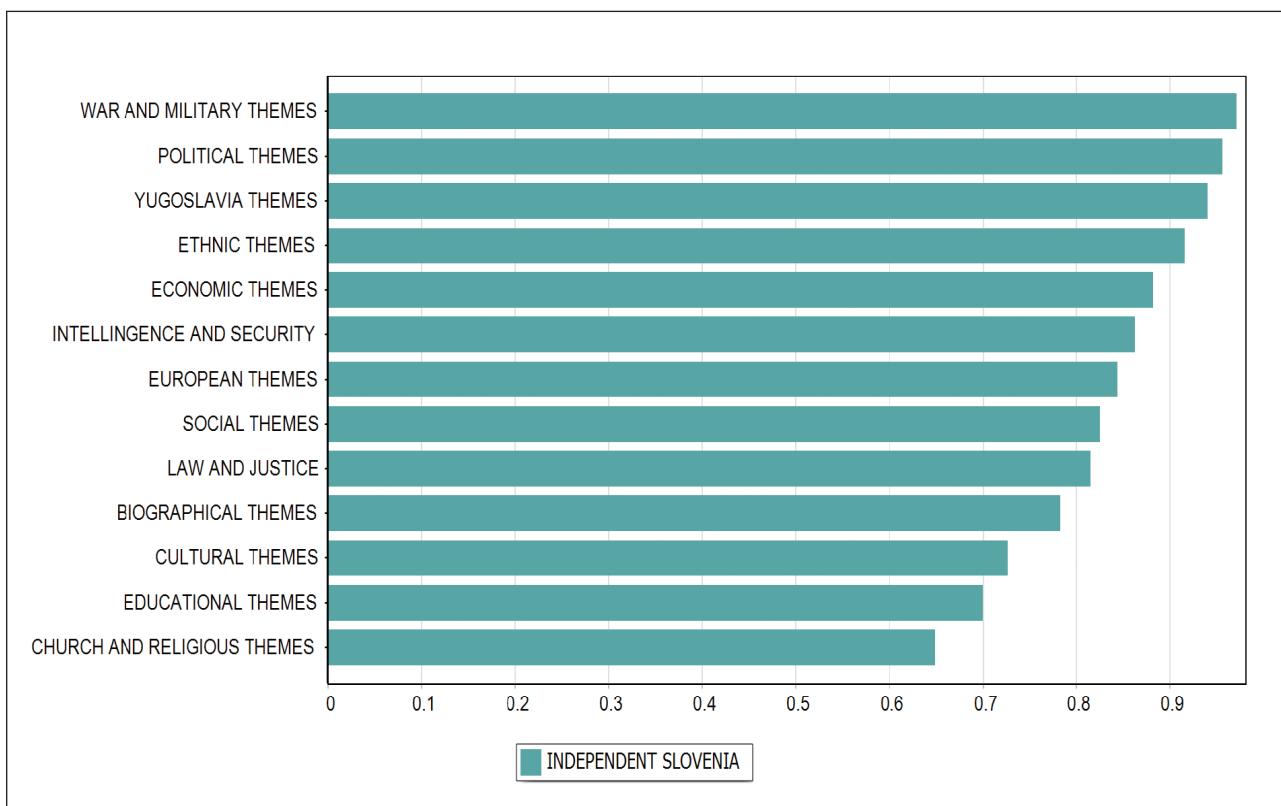


Chart 13: Proximity plot of all themes concerning the themes of Independent Slovenia (Source: Own elaboration).

and Montenegro (Udovič & Vojinović Jačimović, 2019). Both articles show how themes related to the transition to independence and diplomatic efforts during that period are intricately interwoven in scholarly discourse.

Several other articles within our sample exhibit bi-thematic characteristics outlined above (cf. Zajc, 2020; Šela & Hazemali, 2020; Šela, 2023). While these encompass an additional theme, their primary focus revolves around Independent Slovenia, War and Military, Political, and/or Yugoslavia themes.

Some articles are founded on three or more thematic categories, inherently making them multi-thematic. One such example is Jože Možina's article titled "The Slovenian Plebiscite of 1990" (2007). In it, Možina examines the implementation of the Slovenian Plebiscite in 1990, a pivotal event in establishing Slovenian state sovereignty. Možina shows that, during the conceptualization and preparations, the plebiscite was not a unified project of all Slovenian political forces and parties (2007, 145). Similarly, Janez Osojnik's case study, "Predlog Socialistične stranke Slovenije oktobra 1990 za izvedbo plebiscita o samostojnosti Republike Slovenije in odzivi nanj v Sloveniji" (2022b), explores multiple themes and intersects with the topics covered by Možina. These articles weave together Independent Slovenia, Political, Ethnic, and Yugoslavia themes, supporting the analysis of democratization during the early stages of Slovenia's path to independence.

Another article illustrating a similar interplay of Independent Slovenia themes, along with Political, War and Military, and Yugoslavia themes, is Boštjan Udovič's "'Danke Deutschland!': The Political and Diplomatic Contribution of the Federal Republic of Germany to the Creation of Independent Slovenia" (2022). Udovič examines aspects of democratization from 1990–1991, with a focus on Slovenian-German relations. Udovič reveals that as late as the spring of 1991, official German policy aimed at preserving the integrity of Yugoslavia. However, recognizing the impracticality of this stance, Germany foresaw Slovenian and Croatian independence as viable possibilities. With the outbreak of war in Slovenia, Germany shifted its position dramatically, actively engaging in the swift international recognition of Slovenia and Croatia (Udovič, 2022, 535).

Our final example highlighting the interplay of multiple thematic categories is the article "The Role of Milan Kučan in Slovenian Foreign Policy" by Božo Repe (2017). Repe's central focus is on Milan Kučan, the first president of the independent Republic of Slovenia. In this article, he explores Kučan's diplomatic challenges during the independence process and examines the broader national and international events of that era, particularly the

regional conflicts stemming from the dissolution of Yugoslavia (Repe, 2017, 743).

As illustrated above, examples of themes interplaying, overlapping, and complementing each other are diverse and numerous. It is crucial to acknowledge these instances as affirmations of our findings, reinforcing the conclusion that themes related to Slovenia's independence constitute an integral component of the thematic landscape in academic research among Slovenian historians.

The final phase of our analysis involved identifying the platforms where the themes of Independent Slovenia are prevalent. To achieve this, we performed cross-tabulation, aligning the extracted themes with metadata from our sample, specifically focusing on the source journals (see Chart 15).

Chart 15 shows the dominance of the journal *Studia Historica Slovenica* as the primary Slovenian Scopus-indexed platform for articles focusing on Independent Slovenia themes. This journal accounts for 44.8% of the total occurrence of these themes, followed by *Prispevki za novejšo zgodovino*, contributing 25% to the overall occurrence of the themes. *Acta Histriae*, with 17.7% of the total occurrence, is another notable journal in our sample, while other journals play a lesser role.

Given that *Studia Historica Slovenica* serves as the most comprehensive Scopus-indexed Slovenian journal for these themes, a closer examination of the journal is warranted. Relevant themes have consistently appeared in *Studia Historica Slovenica* since 2007. A pivotal contribution is the thematic issue from 2022 (issue 1), dedicated to Slovenia's independence. Within this issue, nine articles explore crucial aspects of social, political, and economic issues in the region, examining Yugoslavia's influence on Slovenia's independence processes, direct and indirect factors impacting Slovenia's democratic transition, and significant social and cultural aspects of everyday life. In line with the thematic model developed here, this special issue exemplifies thematic interplay, as depicted in Chart 14. To illustrate this, we highlight three examples.

In his article titled "Slovensko-srbski konflikt v osemdesetih letih" Božo Repe (2022) explores the dynamics of Slovenian-Serbian relations during the 1980s within the context of the Yugoslav Federation. He focuses on various federal authorities' disputes, such as those between the party leadership and Milan Kučan and Slobodan Milošević. Repe explores conflicts over education, involving common program cores, and the support and disputes among Slovenian and Serbian intellectuals. He investigates their roles in all-Yugoslav ideological campaigns, the Serbian Academy of Sciences and Arts' memorandum, the Slovenian response to it, Slovenian rallies and "calls", the Serbian economic measures

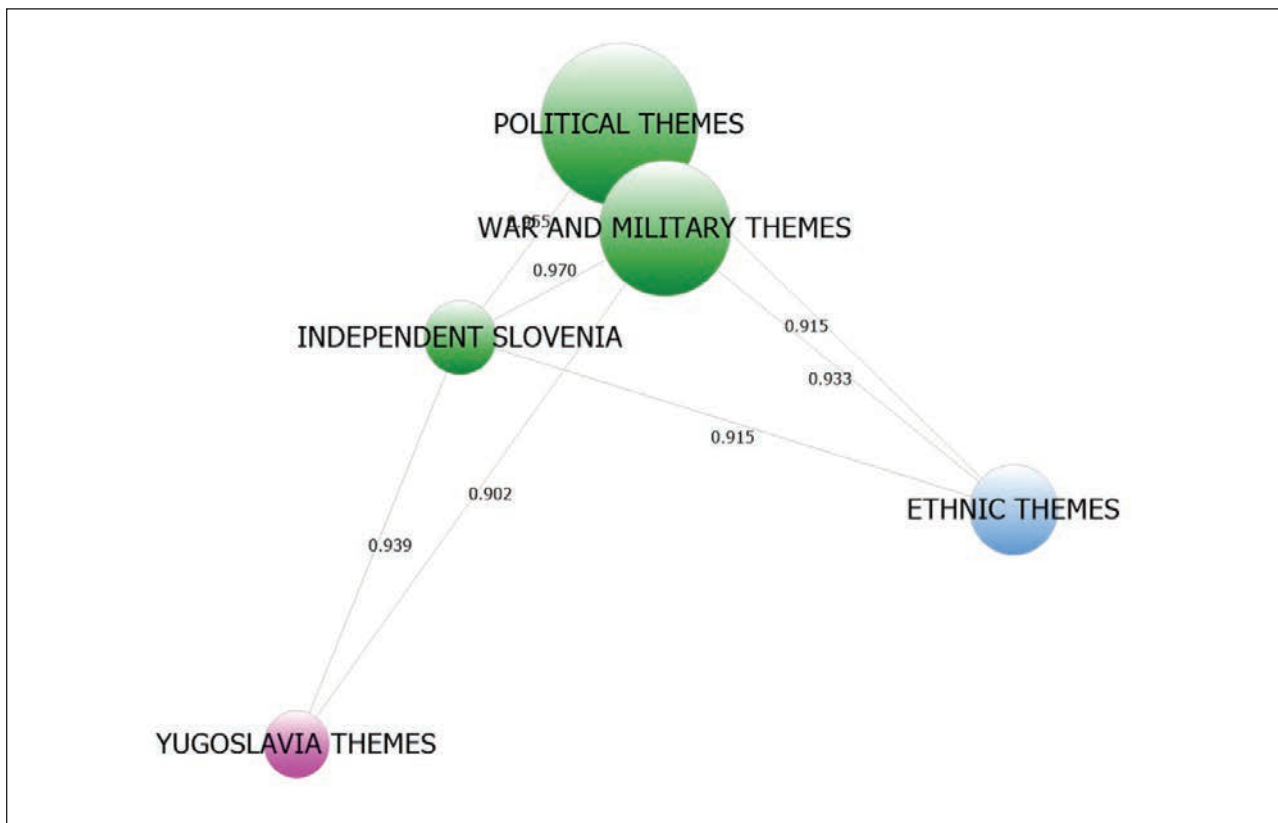


Chart 14: Link analysis of the thematic neighborhood of the themes of Independent Slovenia (Source: Own elaboration).

against Slovenia, and the alleged Slovenian-Serbian pact on Slovenia's secession. Repe provides a compelling example of the intricate interplay among core Independent Slovenia themes, including Political, Ethnic, and Yugoslavia themes, while also encompassing War and Military, Educational, Economic, Social and Cultural themes.

A second instance demonstrating a comparable interplay can be observed in Jure Gašparič & Tjaša Konovšek's "Transformation of the Political System: From the Tripartite Assembly of the Socialist Republic of Slovenia to the National Assembly and National Council of the Republic of Slovenia" (2022). Gašparič & Konovšek examine the transition from state socialism to parliamentary democracy in the context of Slovenia, focusing on constitutional changes during the establishment of the new Slovenian constitution and the functioning of the Slovenian National Assembly post-1991. Despite its primary emphasis on political systems, it serves as an excellent illustration of the interplay among themes related to Political, Yugoslavia, and Ethnic themes, all contributing to the overarching argument concerning the democratization and independence of Slovenia.

The final example is Darja Kerec's article titled "Slovenian Society in a Maelstrom of Cultural Change, New Trends and Technologies in the 1980s and 1990s" (2022). Examining shifts and patterns in Slovenia from the 1980s to the end of the 1990s, Kerec employs Cultural, Social, Ethnic, Political, and Economic themes to address critical issues during Slovenia's move toward independence. A pivotal aspect lies in the intricate connections among culture, art, media, technology, politics, ethnicity, society, and state, contributing to a comprehensive understanding of this multifaceted phenomenon:

Culture and art, especially music, served as a vital unifying force among nations in Yugoslavia during the 1980s. The Eurovision music contest enjoyed significant popularity. In the latter half of the 1990s, Slovenia witnessed the establishment of its first commercial television stations. A few weeks before gaining independence, Slovenia became one of only 16 countries with its own Internet connection. Widespread Internet access didn't materialize until the late 1990s and

on a large scale since 2000. [...] Post-2000, baby names trended towards brevity, often with a foreign 'non-Slovenian overtone.' This trend, along with peculiar fixations on world records and tractors, constitutes three noteworthy and somewhat amusing cultural shifts. (Kerec, 2022, 606)

CONCLUSION

This bibliometric and sociometric analysis of Scopus-indexed Slovenian history journals revealed several key findings:

- The thematic analysis identifies four key thematic groups or clusters – Socio-cultural, Political, Religious, and Yugoslavia – providing a structured understanding of the diverse content within the sample.
- Most themes exhibit an increasing trend in occurrence, particularly evident in Social, Cultural, Ethnic, Political, War and Military, Church and Religious, and Yugoslavia themes.
- The thematic field represented in the sample is vibrant, diverse, well-integrated, and longitudinally stable, indicating a robust and enduring scholarly landscape.
- The sample reflects a relatively balanced distribution of male (52.3%) and female (47.7%) first authors contributing to Slovenian history journals indexed in Scopus, showcasing inclusivity in scholarly participation.
- Themes demonstrate gender balance, with exceptions such as Cultural and Educational themes predominating among female authors, while Yugoslavia and Law and Justice themes predominate among male authors.
- Themes generally appear relatively equally accessible through language, with exceptions like Intelligence and Security themes being more prevalent in Slovenian and European themes being more accessible in foreign languages, predominantly English.
- Themes related to Slovenia's independence, while relatively scarce compared to other themes, occur regularly with dynamic frequency. They are closely related to War and Military and Political themes, acting as integral components in multi-thematic studies and connecting different thematic groups.
- Three Scopus-indexed Slovenian history journals – *Studia Historica Slovenica*, *Prispevki za novejšo zgodovino*, and *Acta Histriae* – emerge as major platforms for articles containing Independent Slovenia themes.

By focusing on Scopus-indexed Slovenian history journals, this study has identified key thematic groups, explored their upward trends, and nuanced author gender preferences. The results provide a valuable foundation for scholars and researchers interested in the history of Slovenia's path to independence and bibliometrics.

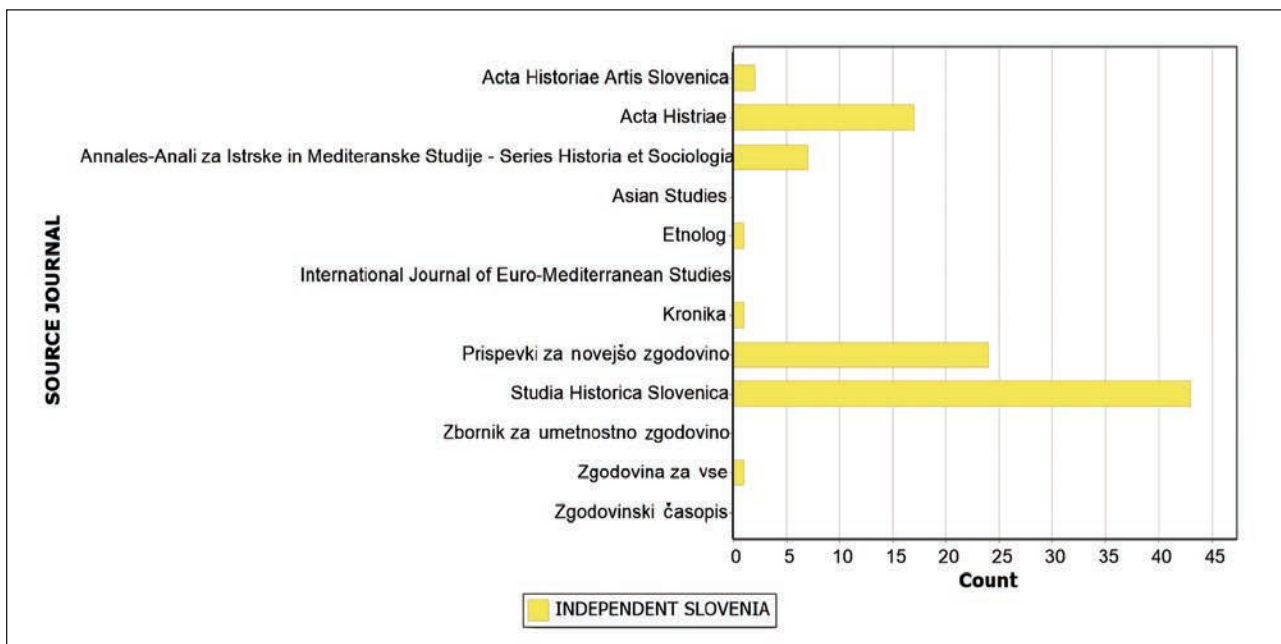


Chart 15: Distribution of Independent Slovenia themes within source journals (Source: Own elaboration).

Although our research effectively addresses its objectives, it is important to acknowledge certain limitations. Firstly, challenges related to metadata accuracy and the completeness of the sample are recognized, potentially impacting the overall robustness of the study. Secondly, limitations are inherent in our sampling method, as we relied exclusively on the Scopus database, limiting the generalizability of results. To enhance the comprehensiveness of future studies, expanding data sources to include databases like the Web of Science Core Collection in a controlled, integrated, and holistic manner is suggested.

Moreover, our findings are rooted in a categorization model that is, to some extent, influenced by our academic affiliation and profile. The adoption of an alternative categorization model could

potentially influence results and reshape the presented map of thematic fields.

Building on the insights gained from this analysis, future studies could broaden the thematic scope to encompass a more extensive range of historical topics within Slovenian historiography. An exploration of the intersectionality of dynamics with analyzed themes can provide a deeper understanding of gender and authorship trends. Further investigations into regional variations and the impact of language on thematic accessibility have the potential to enhance our comprehension of the broader historical discourse. Additionally, considering the implications of these themes within the international context could open avenues for comparative analyses, contributing to and enriching the ongoing scholarly conversation within the global historical community.

TEMATSKO PROUČEVANJE SLOVENSKE OSAMOSVOJITVENE POTI V SLOVENSКИH ZGODOVINSKIH REVIJAH, UVRŠČENIH V BAZO PODATKOV SCOPUS: BIBLIOMETRIČNA IN SOCIOMETRIČNA ANALIZA

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POVZETEK

*V članku je predstavljena analiza raziskovanja tem, ki se nanašajo na osamosvajanje Slovenije, v 12 slovenskih znanstvenih zgodovinskih revijah, indeksiranih v bazi podatkov Scopus. Z uporabo izbranih orodij in metod digitalne humanistike smo preučili bibliometrične in sociometrične vidike člankov ter tako skušali ugotoviti, kako te teme sobivajo z drugimi pomembnimi temami. Vsebinska analiza temelji na naslednjih predpostavkah: 1.) Teme v člankih obstajajo kot ločene, specifične in izrazite entitete, ki pa kljub temu delujejo v korespondenci z drugimi temami in podpirajo glavne ideje člankov, v katerih se pojavljajo. 2.) Teme je mogoče izluščiti iz ključnih elementov člankov, in sicer naslovov, ključnih besed in povzetkov. Analiza 3.759 člankov (naslovi, ključne besede, povzetki) je pokazala štiri glavne tematske skupine: družbeno-kulturne, politične, verske in teme povezane z Jugoslavijo. Predvsem je bilo opaziti porast družbeno-kulturnih, etničnih, političnih, vojnih in vojaških, cerkvenih in verskih tem ter tem, povezanih z Jugoslavijo. Tematsko polje deluje živahno, obsežno, dobro integrirano in dolgoročno stabilno. Spola prvopodpisanih avtorjev sta bila uravnotežena, razen pri kulturnih in izobraževalnih temah, kjer so prednjačile ženske avtorice, ter pri temah o Jugoslaviji ter pravu in pravosodju, kjer so prednjačili moški avtorji. Jezikovna dostopnost se je nagibala k nacionalni/mednarodni, z nekaterimi izjemami (obveščevalne in varnostne teme v slovenščini, evropske teme v angleščini). Teme, povezane z osamosvajanjem Slovenije, so se sicer pojavljale redkeje, vendar so se pojavljale dosledno in se povezovala z drugimi temami ter delovale kot mostovi med njimi. Te teme so tesno povezane s tistimi, ki se osredotočajo na vojno in vojsko, ter političnimi temami, hkrati pa vzpostavljajo pomembne povezave z etničnimi temami in tistimi, ki se nanašajo na Jugoslavijo. Dinamika teh tem, povezanih z osamosvajanjem, je zelo odvisna od zunanjih vplivov, vključno z obletnicami, simpoziji in spominskimi dogodki v akademski skupnosti. V tem kontekstu se tri revije v našem vzorcu – *Studia Historica Slovenica*, *Prispevki za novejšo zgodovino* in *Acta Histriae* – pojavljajo kot pomembne platforme za članke, ki vključujejo teme, povezane z osamosvajanjem Slovenije.*

Ključne besede: bibliometrična in sociometrična analiza, orodja in metode digitalne humanistike, demokratizacijski procesi, samostojna Slovenija, vsebinska analiza, tematska analiza slovenskih zgodovinskih revij

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received: 2024-09-15

DOI 10.19233/ASHS.2024.36

PRAVNI VIDIK UREDITVE DELOVNEGA ČASA VISOKOŠOLSKIH UČITELJEV IN PRAVICA DO ODKLOPA

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IZVLEČEK

V prispevku je analiziran pravni vidik ureditve delovnega časa visokošolskih učiteljev. Podrobno so prikazane posebnosti, vezane na ureditev delovnega časa visokošolskih učiteljev, in možnosti uporabe pravice do odklopa, ki je specifična za visoko šolstvo ter vezana na delovne obveznosti visokošolskih učiteljev. Obravnavani so trije sklopi: normativna ureditev delovnega časa visokošolskih učiteljev, posebnosti pri določanju njihovega delovnega časa in njihov položaj pri urejanju pravice do odklopa. Osnovna hipoteza v prispevku je, da je potrebno pri določanju delovnega časa in pravice do odklopa to ustrezno normativno urediti na način, da so upoštevane posebnosti položaja visokošolskih učiteljev, ki imajo sklenjeno pogodbeno razmerje z avtonomno institucijo – univerzo.

Ključne besede: posebnosti položaja visokošolskega učitelja, delovni čas visokošolskega učitelja, pravica do odklopa, avtonomija univerze, pogodbenost delovnega razmerja visokošolskega učitelja

ASPETTI GIURIDICI DELLA REGOLAMENTAZIONE DELL'ORARIO DI LAVORO DEGLI INSEGNANTI UNIVERSITARI E IL DIRITTO ALLA DISCONNESSIONE

SINTESI

L'articolo analizza gli aspetti giuridici della regolamentazione dell'orario di lavoro degli insegnanti universitari. Vengono illustrate in dettaglio le specificità relative alla regolamentazione dell'orario di lavoro dei professori universitari e alla possibilità di avvalersi del diritto alla disconnessione, specifico dell'istruzione superiore e correlato agli obblighi lavorativi dell'insegnante universitario. Vengono discusse tre questioni: la regolamentazione normativa dell'orario di lavoro dell'insegnante universitario, le specificità nella determinazione dell'orario di lavoro dell'insegnante universitario e la loro posizione nella regolamentazione del diritto alla disconnessione. L'ipotesi di fondo dell'articolo è che sia necessaria una regolamentazione normativa adeguata dell'orario di lavoro e del diritto alla disconnessione, in modo tale che le specificità della posizione dei docenti dell'istruzione superiore che hanno un rapporto contrattuale con un'istituzione autonoma/università vengano prese in considerazione.

Parole chiave: specificità della figura dell'insegnante universitario, orario di lavoro dell'insegnante universitario, diritto alla disconnessione, autonomia dell'università, natura contrattuale del rapporto di lavoro dell'insegnante universitario

UVOD

Visokošolski učitelji so izvajalci pedagoškega in znanstvenoraziskovalnega dela na univerzah. Posebnost njihovega položaja izhaja iz narave njihovega dela, ki temelji na široko pridobljenem znanju na posameznem področju, ustrezni usposobljenosti, priznani s strani pooblaščenih institucij, ter visoki zavezanosti standardom etičnosti in kakovosti na izobraževalnem in znanstvenoraziskovalnem področju. V Priporočilih o statusu visokošolskih učiteljev (1997), ki jih je sprejela generalna skupščina UNESCO, so bile podane smernice za ureditev položaja visokošolskih učiteljev, med njimi je še posebej izpostavljeno, da gre za obliko javne službe, ki od visokošolskih učiteljev zahteva strokovno znanje in specializirane veščine, pridobljene in vzdrževane z natančnim in vseživljenjskim študijem ter raziskovanjem. V 33. točki priporočil je bilo prav tako predvideno, da uresničevanje pravic visokošolskih učiteljev zanje predstavlja posebne dolžnosti in odgovornosti.

Visokošolski učitelji so nosilci izobraževalnega procesa na univerzah. V točki 43.b Priporočil o statusu visokošolskih učiteljev je predvideno, da naj bi imeli visokošolski učitelji na univerzah sklenjeno delovno razmerje v skladu z mednarodnimi standardi, ki so nastali v okviru Organizacije Združenih narodov in Mednarodne organizacije dela. Ni pomembno, kakšen sistem ureditve delovnih razmerij velja za visokošolske učitelje v posamezni državi, pomembno je, da so deležni ustrezne delovnopravne zaščite in ureditev vseh temeljev sklenjenega delovnega razmerja. Ob upoštevanju delovnopravnega varstva visokošolskih učiteljev pa je nujno potrebno, da je zakonodaja pripravljena na način, da so pri urejanju posameznih institutov delovnega razmerja upoštewane tudi posebnosti, ki izhajajo tako iz vloge univerze, kot iz značilnosti dela visokošolskih učiteljev (Tancer Verboten, 2022, 252–254).

V Republiki Sloveniji obstaja več režimov delovnih razmerij, ki se razlikujejo v tem, kdo je delodajalec oziroma v kakšni pravnoorganizacijski obliki so delavci oziroma javni uslužbenci zaposleni (Korpič Horvat, 2020, 312). Za zaposlene v zasebnem sektorju se uporablja Zakon o delovnih razmerjih (ZDR-1, Uradni list RS, št. 21/2013 in naslednji), za ureditev delovnopravnega položaja javnih uslužbencev pa se uporablja Zakon o javnih uslužbencih (ZJU, Uradni list RS, št. 67/2007 in naslednji) in posebni predpisi, ki urejajo delovna razmerja po posebnih področjih javnega sektorja, recimo področje zdravstva Zakon o zdravstveni dejavnosti (ZZDej, Uradni list RS, št. 23/2005 in naslednji) in Zakon o zdravniški službi (ZZdrS, Uradni list RS, št. 72/2006 in naslednji), področje

šolstva Zakon o organizaciji in financiranju vzgoje in izobraževanja (ZOFVI, Uradni list RS, št. 16/2007 in naslednji) ipd. Tudi delovnopравни položaj visokošolskih učiteljev je v Republiki Sloveniji urejen različno, in sicer s splošno delovnopravno zakonodajo ter v okviru uslužbenskih razmerij vezano na plačni sistem javnega sektorja za visokošolske učitelje s statusom javnega uslužbenca, zaposlenega na javnih univerzah, ali v okviru delovnopravne zakonodaje za visokošolske učitelje, zaposlene na privatnih univerzah. Za oba statusa veljajo določbe specialne visokošolske zakonodaje.

Kot prakso, ki bi ji lahko sledili pri normativni ureditvi položaja visokošolskega učitelja in ki naslavlja posebnost ureditve za visokošolske učitelja, izpostavljam Avstrijo, kjer je status visokošolskih učiteljev opredeljen v Zakonu o univerzah (*Universitätsgesetz* – UG, Bundesgesetzblatt für die Republik Österreich, št. 120/2002 in naslednji), in sicer so status javnega uslužbenca lahko obdržali samo zaposleni pred letom 2004, po tem letu ga ni bilo več mogoče pridobiti. Univerze pri urejanju delovnopravnega položaja visokošolskih učiteljev uporabljajo splošno delovno zakonodajo, in sicer jih zavezujejo Zakon o delovnem času (*Arbeitszeitgesetz* – AZG, Bundesgesetzblatt für die Republik Österreich, št. 461/1969 in naslednji), Zakon o počitku med delom (*Arbeitsruhegesetz* – ARG, Bundesgesetzblatt für die Republik Österreich, št. 144/1983 in naslednji), Zakon o dopustu (*Urlaubsgesetz* – UrlG, Bundesgesetzblatt für die Republik Österreich, št. 390/1976 in naslednji), Zakon o pokojnini za zaposlene in samozaposlene (*Betriebliche Mitarbeiter und Selbständigenvorsorgegesetz* – BMS-VG, Bundesgesetzblatt für die Republik Österreich, št. 100/2002 in naslednji). Za vse zaposlene na univerzi se uporablja Zakon o enakopravnosti zaposlenih (*Bundes-Gleichbehandlungsgesetz* – BGIBG, Bundesgesetzblatt für die Republik Österreich, št. 100/1993 in naslednji). Po drugi strani pa veljajo posebne določbe Zakona o univerzah, ki se nanašajo na delovna razmerja visokošolskih učiteljev in ki delno nadomeščajo ter dopolnjujejo splošne določbe delovnega prava. V Avstriji je po nekaj letih pogajanj od 1. oktobra 2009 začela veljati Kolektivna pogodba za zaposlene na univerzi, tj. kolektivna pogodba univerz, ki bolj podrobno ureja pravice in obveznosti visokošolskih učiteljev.

Prispevek je sestavljen iz dveh vsebinsko povezanih tem in sicer splošna normativna ureditev delovnega časa, ki velja tudi za visokošolske učitelje in pravica do odklopa, ki je stopila v veljavo in velja tudi za visokošolske učitelje. Vezano na tematiko prispevka, je potrebno pri specifičnosti ureditve delovnopravnega položaja visokošolskih učiteljev za določanje delovnih obveznosti upoštevati, kakšno je njihovo normiranje delovnega časa.

Pomembno je tako preučiti normativno ureditev delovnega časa visokošolskih učiteljev in posebnosti, ki bi morale biti določene in so vezane na položaj visokošolskega učitelja. Prav tako se postavlja vprašanje, kakšni so ustrezni ukrepi, ki jih mora določiti delodajalec za uveljavitev pravice do odklopa za visokošolske učitelje. Pri pravici do odklopa bi moral biti prav tako razviden poseben položaj visokošolskega učitelja. Pravica do odklopa bi morala biti zastavljena previdno, da se z njo ne poseže v znanstvenoraziskovalno delo, hkrati pa dovolj fleksibilna, da dovoljuje ravnovesje med poklicnim in zasebnim življenjem ter omogoča varovanje zdravja visokošolskih učiteljev.

Pri izdelavi prispevka bo uporabljena metoda deskripcije za opredelitev temeljnih pojmov vezanih na delovni čas, posebnosti delovnih razmerij visokošolskih učiteljev in pravice do odklopa. Pri predstavitvi sistema ureditve položaja visokošolskega učitelja v Avstriji bo uporabljena primerjalno-pravna metoda. V zaključnih ugotovitvah bo predmet uporabe metoda sinteze.

NORMATIVNOST UREDITVE DELOVNEGA ČASA

Pomembnost ureditve delovnega časa izhaja iz ureditve tako na mednarodni kot nacionalni ravni, pri čemer so določeni osnovni standardi za okvir delovnega razmerja posameznega delavca. Temelji za nacionalno urejanje delovnega časa za delavce na splošno ali za določene kategorije delavcev tako izhajajo iz konvencij Mednarodne organizacije dela (MOD),¹ v okviru Sveta Evrope je pomembna Evropska socialna listina,² v okviru EU pa sta z vidika minimalnih standardov, vezanih na delovni čas, pomembni Listina EU o temeljnih pravicah (2010) kot primarni pravni vir in Direktiva 2003/88/ES Evropskega parlamenta in Sveta z dne 4. novembra o določenih vidikih organizacije delovnega časa (Direktiva 2003/88/ES; Senčur Peček, 2019, 412). Konvencije MOD so določile standarde glede dolžine dnevnega in tedenskega delovnega časa ter minimalni čas počitka, novejši predpisi pa določajo varstvo s posameznimi oblikami delovnega časa (Senčur Peček, 2018, 585).

Direktiva 2003/88/ES določa minimalne varnostne in zdravstvene zahteve pri organizaciji delovnega časa in se nanaša na minimalni čas dnevnega počitka, tedenskega počitka in letnega dopusta, kot tudi na odmore in najdaljši tedenski delovni čas, ter izpostavlja določene vidike nočnega in izmenskega dela ter vzorcev dela. Uporablja se za vse sektorje

dejavnosti, in sicer tako javne kot zasebne. Direktiva podaja tudi opredelitve pojmov delovni čas, čas počitka, nočni čas in izmensko delo. Z Direktivo 2003/88/ES je za države Evropske unije zahtevana ureditev na nacionalni ravni za vse delavce (razen posebnih dejavnosti, kot je zdravstvo), ki delavcem omogoča minimalni dnevni počitek v obsegu 11 ur v sklopu 24-urnega obdobja, odmor v okviru delovnega dne, ki je daljši od šest ur, 24 ur neprekinjenega počitka na sedem dni (kar je pravica, ki velja poleg dnevnega počitka) ter štiri tedne letnega dopusta. Visokošolski učitelji oziroma področje visokega šolstva in raziskovalne dejavnosti v okviru Direktive 2003/88/ES ni določeno kot izjema, kar pomeni, da je minimalne standarde potrebno v celoti upoštevati za ureditev delovnega časa visokošolskega učitelja.

Za ureditev delovnega časa visokošolskih učiteljev v Republiki Sloveniji se uporablja splošna delovnopravna zakonodaja, saj v okviru visokošolske zakonodaje ni zaslediti specialnih določb, ki bi opredeljevale delovni čas. Pomemben pravni vir za urejanje delovnega časa so kolektivne pogodbe (Senčur Peček, 2018, 584). Z uveljavitvijo UG se je v Avstriji spremenila ureditev delovnega časa za visokošolske učitelje. § 110 UG za visokošolske učitelje, zaposlene na univerzah v Avstriji, določa normativne podlage za določitev delovnega časa. V § 110 UG so predpisana izhodišča urejanja delovnega časa visokošolskih učiteljev, in sicer opredelitev delovnega časa, dnevnega delovnega časa, tedenskega delovnega časa in nočnega dela. Določene posebnosti ureditve delovnega časa ureja Kolektivna pogodba za zaposlene na univerzah, in sicer je predvidena možnost ureditve z obratnimi dogovori, prav tako so predvidene prerazporeditve delovnega časa.

Dolžina delovnega časa in določitev posebnosti delovnega časa visokošolskih učiteljev

Akademski poklic, izvedba pedagoškega procesa in delo s študenti, na drugi strani pa zahtevno znanstvenoraziskovalno delo, terjajo posebno ureditev instituta delovnega časa visokošolskih učiteljev. Trajanje in razporeditev delovnega časa je pri visokošolskih učiteljih vezana na raznolikost in zahtevnost dela, ki ga opravljajo, in sicer ob upoštevanju pedagoških aktivnosti in obveznosti, ki jih imajo do študentov. Organizacija dela na univerzi je specifična in neprimerljiva z ostalimi dejavnostmi, čemur bi moral slediti tudi akademski

1 Za urejanje delovnega časa je MOD sprejeta 25 konvencij in 14 priporočil. Izpostavim naj naslednje: Konvencija MOD št. 47 o štirideset urnem delovniku, Konvencija MOD št. 89 o nočnem delu žena, zaposlenih v industriji, Konvencija MOD št. 132 o plačanem letnem dopustu ter novejša Konvencija MOD št. 175 o delu s krajšim delovnim časom.

2 V 2. členu Evropske socialne listine se države članice zavezujejo, da določijo razumno trajanje dnevnega in tedenskega delovnega časa, pri čemer naj bi se delovni teden postopoma skrajševal do ravni, ki jo dopuščajo povečanje storilnosti in drugi pomembni dejavniki.

delovni čas. Prevelika normiranost delovnega časa in izenačevanje položaja visokošolskega učitelja z delavcem predstavlja padec raziskovalnega dela in univerzam odvzema konkurenčno prednost pri razvoju znanosti. Potrebno se je namreč zavedati, da imajo visokošolski učitelji na univerzah hibriden pedagoški in raziskovalni položaj, njihov delovni čas, ki ga uporabijo za pedagoško delo in raziskovanje ter druge naloge, pa se razlikuje glede na akademske nazive in je verjetno skupek institucionalnih ciljev, razpoložljivih sredstev ter poklicnih standardov. Tudi vloga delodajalca je pri opredeljevanju delovnega časa visokošolskih učiteljev posebnost, saj to ni tipično delovno razmerje, kjer delodajalec daje natančna navodila in vodi delovni proces, temveč je organizacija delovnega procesa odvisna od pedagoških aktivnosti visokošolskega učitelja, ter njegove avtonomije pri opravljanju znanstvenoraziskovalnega dela.

Pri pravni določitvi delovnega časa visokošolskega učitelja je potrebno upoštevati tako delovne obveznosti, ki jih mora visokošolski učitelj opraviti, možnost podajanja navodil in izvajanja nadzora s strani delodajalca, ki ni enaka tipičnemu delodajalcu, kot tudi varstveni vidik delovnega časa, vezan na ustrezne obremenitve visokošolskega učitelja. Določitev delovnega časa vpliva tudi na možnosti delavca za usklajevanje poklicnega in družinskega življenja, kar danes predstavlja tudi cilj EU, izražen tudi s sprejetjem Direktive EU 2019/1158 Evropskega parlamenta in Sveta o usklajevanju poklicnega in zasebnega življenja staršev in oskrbovancev. Pomembna elementa pri pravni ureditvi delovnega časa sta njegova dolžina (kot razporeditev) in njegove oblike (Senčur Peček, 2022, 858).

Za odgovor na vprašanje, kaj sodi v delovni čas visokošolskega učitelja, je pomembna določitev individualne pedagoške obremenitve visokošolskega učitelja, ki v Republiki Sloveniji temelji na 63. členu Zakona o visokem šolstvu (ZViS, Uradni list RS, št. 32/2012 in naslednji). Ta določa višino tedenske obremenitve z neposredno pedagoško obveznostjo v sklopu 40-urnega tedenskega delovnika, ki je za visokošolske učitelje glede na naziv, ki ga dosega, razdeljena v dve skupini, in sicer: za docenta, izrednega in rednega profesorja pet do sedem ur tedensko, za višjega predavatelja, predavatelja in lektorja devet ur tedensko. Dolžina delovnega časa, ki ga visokošolski učitelji opravijo za druge oblike delovnih obveznosti (znanstvenoraziskovalno delo, posredna pedagoška obveznost, strokovno delo), je samo pavšalno normirana ter običajno opredeljena v splošnih aktih univerz, odvisna pa je tudi od

dejstva, ali v posameznem obdobju poteka pedagoški proces ali ne. Delovne obveznosti, vezane na časovno obdobje, ko poteka pedagoški proces, so drugačne in običajno povečane, kar izhaja tudi iz posameznih analiz. V analizi delovnega časa iz leta 2013 je predstavljeno, da je v Avstriji tedenski delovni čas visokošolskih učiteljev v času, ko poteka pedagoški proces, 42 ur na teden, v Italiji pa ta obsega 46 ur na teden (Kwiek & Antonowicz, 2013, 43). Primerjava s stanjem v Republiki Sloveniji v letu 2013 kaže na to, da je bil tedenski delovni čas visokošolskih učiteljev v nazivu redni profesor v času, ko je potekal pedagoški proces (čas predavanj), 53,61 ure (Flander et al., 2020, 54), kar predstavlja višjo obremenitev visokošolskih učiteljev v Republiki Sloveniji kot v Avstriji, na Finskem in Italiji. V letu 2018 se je tedenska obremenitev znižala na 47,97 ure, kar je primerljivo z obremenitvijo visokošolskih učiteljev z referenčnimi državami. Razlogi za to so vezani na generacijski upad – manjšanje generacij študentov, ki pristopajo k študiju, kar pomeni manj skupin študentov pri izvedbi dela pedagoških aktivnosti.

Delovni čas visokošolskih učiteljev je neenakomerno urejen iz razloga vezanosti na čas, ko poteka pedagoški proces. Iz razloga neenakomerne razporeditve delovnega časa je potrebna določitev referenčnega obdobja za čas, ko je potrebno obremenitve visokošolskih učiteljev izravnati. Neenakomerna razporeditev in referenčno obdobje je običajno urejeno v kolektivnih pogodbah, ki veljajo za univerze.³ Ureditve v RS za področje visokega šolstva ni ustrezna, saj ZDR-1, ki v tem delu velja za univerze, zelo na splošno sicer določa razloge za uvedbo neenakomerne razporeditve, omejitev dolžine delovnega časa v večjem obsegu dela in referenčno obdobje, hkrati pa dopušča možnost, da bi kolektivne pogodbe odstopile od zakonske ureditve in uredile referenčno obdobje drugače ali pa neenakomerno razporeditev delovnega časa vsebinsko in časovno omejile (Senčur Peček, 2018, 597). Kolektivna pogodba za dejavnost vzgoje in izobraževanja v Republiki Sloveniji neenakomerno razporeditev delovnega časa v 44.a členu posebej ureja le za učitelje v osnovnih in srednjih šolah in ne za delo visokošolskih učiteljev na univerzi. Ureditve posebnosti neenakomerne razporeditve delovnega časa visokošolskih učiteljev bi bilo potrebno urediti vsaj v pristojni kolektivni pogodbi po vzoru avstrijske in finske ureditve. (Ne)primernost vodenja evidence delovnega časa visokošolskega učitelja se je še povečala v letu 2023 s sprejetjem Zakona o spremembah in dopolnitvah Zakona o evidencah na

3 Tako recimo v Avstriji Kolektivna pogodba za zaposlene na univerzah (2009) določa obračunsko obdobje 12 mesecev za visokošolske učitelje, na Finskem je v Splošni kolektivni pogodbi za univerze (Splošna kolektivna pogodba za univerze, 2020) kot možnost prožnejše oblike razporejanja delovnega časa določena shramba (zaloga) delovnega časa.

področju dela in socialne varnosti (ZEPDSV, Uradni list RS, št. 50/2023), saj naslavlja vse delodajalce ne upošteva njihov poseben položaj in posledično nalaga nove nesorazmerne obveznosti tudi delodajalcem na področju visokega šolstva in znanosti v zvezi z evidentiranjem delovnega časa.

Poleg neenakomerne razporeditve delovnega časa v času pedagoškega procesa se postavlja vprašanje razporeditve delovnega časa, ki ga ni mogoče ali ni nujno opravljati po vnaprej določenem časovnem razporedu. Narava dela visokošolskih učiteljev, predvsem v okviru znanstvenoraziskovalnega dela, bi morala biti urejena v obliki prožnega delovnega časa. Gre torej za vprašanje, ali in v kolikšni meri si visokošolski učitelji lahko sami razporejajo delovni čas, kar vpliva tudi na ureditev nove pravice, določene tudi za visokošolske učitelje, tj. pravice do odklopa.

PRAVICA DO ODKLOPA

V Resoluciji Evropskega parlamenta z dne 21. januarja 2021 s priporočili Komisiji o pravici do odklopa (2019/2181(INL)) je v 10. točki določena pravica do odklopa (angl. *right to disconnect*) kot pravica delavcev, da ne opravljajo z delom povezanih dejavnosti ali komunikacije zunaj delovnega časa z uporabo digitalnih orodij, npr. opravljanja telefonskih klicev oz. pošiljanja elektronske pošte ali drugih sporočil. Pravica do odklopa naj bi delavcem omogočala pravico, da izključijo z delom povezana orodja in se ne odzivajo na zahteve delodajalcev izven delovnega časa, ne da bi to imelo zanje negativne posledice, kot je odpustitev ali drugi povračilni ukrepi. Predvideno je bilo, da bi morala pravica do odklopa veljati za vse delavce in vse sektorje, javne in zasebne, ter da bi jo bilo potrebno učinkovito uveljavljati, saj je namen te pravice zagotavljanje varstva zdravja in varnosti delavcev ter pravičnih delovnih pogojev, vključno z usklajevanjem poklicnega in zasebnega življenja. V posameznih državah EU je že najti primere različnih ukrepov ali pravil, ki naj bi preprečevali z delom povezane negativne učinke uporabe informacijske tehnologije na način varovanja prostega časa delavcev ter omogočanje usklajevanja poklicnega in družinskega življenja. Ti različni ukrepi so uveljavljeni na podjetniški ravni, na ravni panožnih kolektivnih pogodb, lahko pa tudi na nacionalni ravni (Senčur Peček, 2021, 311). Nekatere organizacije in podjetja so uvedle politike in prakse, ki poskušajo zagotoviti bolj uravnotežen pristop do delovnih obveznosti, pojavile so se tudi teze, da je pravica do odklopa od dela človekova pravica (von Bergen & Bressler, 2019, 56). Francija je bila najbolj proaktivna država pri vzpostavljanju pravnih okvirjev za zaščito pravice delavcev do odklopa; leta 2017 je uveljavila pionirski zakon El

Khomri, poimenovan po francoski ministrici za delo (von Bergen & Bressler, 2019, 57). Zanimivo je, da zakon ne opredeljuje vsebine pravice do odklopa, temveč zahteva, da se delavci in delodajalci pogajajo med drugim tudi o povezavi med osebnim in poklicnim življenjem, torej o uporabi informacijske in komunikacijske tehnologije izven delovnega časa, kar pomeni da morajo konkretizirati pravice delavca do odklopa (Bertoncelj, 2023, 35).

Trenutno pravica do odklopa ni urejena z nobenim obvezujočim dokumentom, ne na mednarodni in ne na ravni EU, deležna pa je posebne pozornosti v posameznih dejavnostih in dokumentih. Izpostaviti je potrebno Avtonomni okvirni sporazum o digitalizaciji, sprejet na ravni EU junija 2020 (Bagari, 2024, 979). Tudi Direktiva 2003/88/ES se nanaša na številne pravice, ki se posredno nanašajo na podobna vprašanja, zlasti na minimalni dnevni in tedenski čas počitka, ki je potreben za varovanje zdravja in varnosti delavcev. Pravica do odklopa je povezana z doseganjem boljšega ravnotežja med poklicnim in zasebnim življenjem – cilj, ki je bil v središču nedavnih evropskih pobud – na primer načeli 9 (Uravnoteženost med poklicnim in zasebnim življenjem) in 10 (Zdravo, varno in dobro prilagojeno delovno okolje ter varstvo podatkov) Evropskega stebra socialnih pravic, pa tudi direktive o usklajevanju poklicnega in zasebnega življenja – čeprav se ne nanašajo posebej na pravico do odklopa (Eurofound, 2021).

Z uveljavitvijo novele ZDR-1D smo se v Republiki Sloveniji pridružili državam, ki imajo zakonsko urejeno pravico do odklopa (Senčur Peček, 2024a, 188). V skladu s 142.a členom ZDR-1 je za delodajalca določena obveznost, da mora delavcem zagotoviti pravico do odklopa, s katero zagotovi, da ta v času izrabe pravice do počitka oziroma v času upravičenih odsotnosti z dela v skladu z zakonom in kolektivno pogodbo oziroma splošnim aktom delodajalcu ne rabi biti na razpolago. V ta namen mora delodajalec sprejeti ustrezne ukrepe, ki zakonsko sicer niso določeni, predvideno pa je, da se ti določijo s kolektivno pogodbo na ravni dejavnosti. Če ukrepi niso sprejeti s kolektivno pogodbo na ravni dejavnosti, se ti določijo s kolektivno pogodbo ožje ravni. Če pri delodajalcu ni sindikata, mora delodajalec predlog ukrepov pred sprejetjem posredovati v mnenje svetu delavcev oziroma delavskemu zaupniku. Svet delavcev oziroma delavski zaupnik mora podati mnenje v roku osmih dni, delodajalec pa mora pred sprejetjem ukrepov posredovano mnenje obravnavati in se do njega opredeliti. Gre za obveznost posvetovanja z neposredno voljenimi delavskimi predstavniki, vendar pa delodajalec na te pripombe oziroma mnenje ni vezan, čeprav je smiselno, da posamezne ukrepe upošteva (Senčur Peček, 2024b, 71). Zakonsko določena je obvestilna

dolžnost delodajalca v primeru sprejetja ukrepov v okviru kolektivne pogodbe dejavnosti, oziroma v kolikor je delodajalec te ukrepe sprejel sam. Obveznost delodajalca v Republiki Sloveniji je, da ukrepe sprejme do 16. novembra 2024.

Kaj pomeni uveljavitev te pravice in katere ukrepe določiti, kot rečeno, v Republiki Sloveniji ni zakonsko določeno. V 4. členu Resolucije Evropskega parlamenta z dne 21. januarja 2021 s priporočili Komisiji o pravici do odklopa (2019/2181(INL)) so naštetih ukrepi s predlogom, da države članice za izvajanje pravice do odklopa določijo vsaj naslednje delovne pogoje: praktična ureditev glede izklopa digitalnih orodij za namene dela, vključno z vsemi z delom povezanimi orodji za spremljanje, sistemom za merjenje delovnega časa in oceno zdravja in varnosti, vključno z oceno psihosocialnega tveganja v zvezi s pravico do odklopa, merila za morebitna odstopanja delodajalcev od zahteve, da delodajalci izvajajo pravico delavca do odklopa, ukrepi za ozaveščanje, vključno z usposabljanjem na delovnem mestu, ki jih sprejmejo delodajalci v zvezi z delovnimi pogoji.

Pravica do odklopa za visokošolske učitelje

Glede na specifiko dela visokošolskih učiteljev, posebnosti delovnih obveznosti, ki so vezane na izvedbo izobraževalnega in znanstvenoraziskovalnega procesa (predvsem izvedba izobraževalnega procesa s strani visokošolskih učiteljev; del njihovih delovnih obveznosti, ki mora potekati neprekinjeno), se postavlja vprašanje, kako na univerzah urediti pravico do odklopa in katere ukrepe določiti. V mesecu januarju je bil sprejet Aneks h Kolektivni pogodbi za dejavnost vzgoje in izobraževanja, v katero pravica do odklopa za dejavnost vzgoje in izobraževanja kljub podanim predlogom univerz ni bila vključena. Izpostaviti je potrebno, da ZDR-1 v 142.a členu ne ureja okoliščin za primer, ko do določitve ustreznih ukrepov s kolektivno pogodbo kljub obstoju sindikata ne pride (ker se socialni partnerji o ureditvi teh ukrepov na primer ne uspejo dogovoriti). Teorija tak primer razlaga na način, da ima delodajalec ob sodelovanju delavskih predstavnikov oziroma delavcev tudi v tem primeru na podlagi prvega odstavka 142.a člena ZDR-1 obveznost sprejetja ustreznih ukrepov (Senčur Peček, 2023, 1278). V Republiki Sloveniji so ukrepi za zagotovitev pravice do odklopa trenutno določeni le v 12. odstavku 33. člena Kolektivne pogodbe grafične dejavnosti ter v 22.a členu Kolektivne pogodbe časopisnoinformativne, založniške in knjigotrške dejavnosti, in sicer obe kolektivni pogodbi vsebujeta identično določbo, ki je bila sprejeta že pred novelo ZDR-1D: »V pogodbi o zaposlitvi mora biti natančno določen čas, v katerem mora biti delavec

na razpolago delodajalcu po telefonu ali elektronski pošti, izven tega časa se delavec ni dolžan javljati ali odgovarjati delodajalcu (pravica do odklopa).«

Zaradi specifičnosti ureditve delovnega časa, ki je odvisen od izvajanja intelektualnega dela ter dosegljivosti študentom, obstaja za visokošolske učitelje glede določitve ustreznih ukrepov težava. Strogi ukrepi, kot so izklop posameznih povezav ob določeni uri, v visokem šolstvu niso primerni, tudi ne moremo govoriti o delovnem času od – do, ko v primerih druge vrste dejavnosti delodajalec ugasne proizvodnjo. Na podlagi navedenega bi moral biti opravljen premislek o priporočilih visokošolskim učiteljem, kdaj in na kakšen način naj bodo dosegljivi delodajalcu. Ena izmed možnosti je pojavljanje generičnih sporočil na napravah IKT, ki delavce opozarjajo, da jim ni potrebno odgovarjati ali se javljati na zahteve delodajalca. Druga možnost je vključitev določenih generičnih besedil v individualne dokumente posameznega visokošolskega učitelja z vsebino, da je delavec dolžan biti na razpolago delodajalcu po telefonu ali elektronski pošti v svojem delovnem času skladno z veljavnimi akti delodajalca, izven tega pa se ni dolžan javljati na klice ali odgovarjati na elektronska sporočila. Na univerzi je potrebno ukrepe za uresničevanje pravice do odklopa zastaviti tako, da visokošolski učitelji ne bodo kaznovani ali zaradi ravnanja ali uveljavljanja pravice do odklopa (ali katere koli druge pravice v skladu z veljavno zakonodajo) postavljeni v slabši položaj. Prepovedani so vsakršni diskriminatorni ukrepi (npr. izguba dohodka ali priložnosti za napredovanje) in negativne posledice, vključno z odpustitvijo in drugimi povračilnimi ukrepi. S pravico do odklopa in njeno implementacijo na posamezni univerzi je potrebno seznanjati tudi študente.

Izpostaviti je potrebno tudi, da so, če delodajalec v skladu s 142.a členom ZDR-1 ne zagotavlja pravice do odklopa, v ZDR-1 določene tudi prekrškovne določbe, in sicer je v 10. točki 217.a člena predvidena prekrškovna sankcija – globa od 3.000 do 20.000 eurov. V šestem odstavku 142.a člena pa je nadalje določeno obrnjeno dokazno breme, tj. če delavec v sporu navaja dejstva, da delodajalec pravice do odklopa ni zagotovil.

ZAKLJUČEK

Visokošolski učitelji imajo poseben položaj, ki ga določa narava njihovega dela. V delovni proces na univerzi so vključeni s pogodbo o zaposlitvi, zato je za delovnopravno varstvo visokošolskih učiteljev nujno potrebno, da je zakonodaja pripravljena na način, da so pri urejanju posameznih institutov delovnega razmerja upoštevana tudi posebnosti, ki izhajajo tako iz vloge univerze, kot

tudi iz značilnosti dela visokošolskih učiteljev. Od visokošolskega učitelja se poleg pedagoškega dela pričakuje tudi znanstvenoraziskovalno delo, kjer se postavlja vprašanje možnosti po vnaprejšnjem definiranju takšnega dela s strani delodajalca. Ne glede na zapisano, pa je tudi akademski poklic potrebno urediti v okviru instituta delovnega časa z upoštevanjem minimalnih delovnopravnih standardov. Delovni čas visokošolskega učitelja je sestavljen iz različnih oblik delovnih obveznosti, ki so neenakomerno razporejene predvsem v času, ko poteka pedagoški proces in ko ima visokošolski učitelj natančno določeno individualno pedagoško obremenitev. Iz razloga neenakomerne razporeditve delovnega časa je potrebna določitev referenčnega obdobja za čas, ko je potrebno obremenitve visokošolskih učiteljev izravnati. Dolžina delovnega časa, ki ga visokošolski učitelji opravijo za druge oblike

delovnih obveznosti, je predvidena samo v pavšalnih vrednostih v internih aktih posamezne univerze, zato bi morala biti narava dela visokošolskih učiteljev urejena v obliki prožnega delovnega časa. Gre torej za vprašanje, ali in v kolikšni meri si visokošolski učitelji lahko sami razporejajo delovni čas, kar vpliva tudi na ureditev nove pravice, določene tudi za visokošolske učitelje, tj. pravice do odklopa.

Vezano na specifikko dela visokošolskih učiteljev se postavlja vprašanje, kako na univerzah urediti pravico do odklopa in katere ukrepe določiti. Pri tej ureditvi bi moral biti narejen premislek v smeri izobraževanja in priporočil visokošolskim učiteljem, kdaj in kako naj bodo dosegljivi delodajalcu. Uporaba pravice do odklopa prinaša kar nekaj odprtih vprašanj, ki so zaenkrat prepuščena avtonomni ureditvi univerz, vendar bi bilo institut primerneje urediti v sklopu pristojne kolektivne pogodbe.

LEGAL ASPECT OF REGULATING WORKING HOURS OF HIGHER EDUCATION
TEACHERS AND THE RIGHT TO DISCONNECT

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SUMMARY

The special position of higher education teachers is determined by the nature of their work. They are employed by the university through an employment contract, and it is therefore indispensable for their protection under the labour law that the legislation is drafted in a way that acknowledges both the specificities arising from the role of the university and from the characteristics of their work. When performing their tasks, scientific research work is expected in addition to their teaching obligation, raising the question of the employer's possibility to define such work in advance. At the same time, it is required for the academic profession to conform to the working time regulation, taking into account the minimum standards of labour law. The working time of higher education teachers consists of various forms of work obligations which are unevenly distributed, especially during the teaching period when a higher education teacher has an individually precisely-determined teaching load. Due to the uneven distribution of working time, it is thus necessary to determine a reference period for the time when the workload of higher education teachers must be offset. Since the length of working time during which higher education teachers perform other forms of work obligations is provided only in flat-rate values by internal acts of individual universities, the nature of their work should be regulated in the form of flexible working hours. It is therefore a question of whether and to what extent higher education teachers can schedule their own working hours, which at the same time affects the regulation of the new right established also for the higher education teachers, i.e. the right to disconnect. Related to the specific nature of the work of higher education teachers, the question arises as to how to regulate the right to disconnect in the university environment, and what measures to adopt. It is the author's belief that consideration should be given on how to educate and guide higher education teachers on the time and manner of their availability to the employer. The use of the right to disconnect brings quite a few open questions, which for the time being are left to the autonomous regulation of the universities, however, it would be more appropriate for them to be addressed by the relevant collective agreement.

Keywords: specifics of the position of higher education teachers, working hours of higher education teachers, right to disconnect, university autonomy, contractual nature of the employment relationship of higher education teachers

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IN MEMORIAM

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IN MEMORIAM

Dr. LUČKA AŽMAN MOMIRSKI

(1961–2024)

Z globoko žalostjo se poslavljamo od Lučke Ažman Momirski, arhitektke, prostorske načrtovalke, raziskovalke, pedagoginje, mentorice in prijateljice, ki nas je mnogo prezgodaj zapustila pri svojih triinšestdesetih letih. Njeno delo, predanost in njena topla osebnost so pustili neizbrisen pečat pri vseh, ki smo z njo sodelovali in delali.

Lučka je bila globoko vpeta v življenje Fakultete za arhitekturo Univerze v Ljubljani, kjer je najprej kot študentka, nato pa kot asistentka, profesorica in mentorica vodila celo vrsto rednih in izbirnih predmetov, kot so Razvoj urbanizma, Arhitektura in arheologija, Arhitekturne analogije, Parametrično oblikovanje in GIS v arhitekturi, Akcijsko planiranje, Strateško načrtovanje ter Projektiranje 1-5. Njena vloga na fakulteti je vključevala tudi mentorstvo številnim diplomskim, magistrskim in doktorskim delom, ki so odražala njeno globoko razumevanje arhitekturnih in urbanističnih procesov.

Kot mentorica je bila dragocena sopotnica v akademskem svetu. Mnogi njeni študenti in sodelavci smo občudovali njen edinstven občutek za podrobnosti in njeno sposobnost, da je vedno znova razširila obzorja tistim, ki so z njo delali. Lučka je z empatijo in predanostjo spodbujala raziskovalni duh pri vseh, s katerimi je prišla v stik. Poleg tradicionalnih arhitekturnih raziskav je bila vedno odprta za preučevanje novih, interdisciplinarnih področij. S študenti in sodelavci se je lotila raziskovanja bivanja v orbiti in na Luni ter preučevala potencialne umetne inteligence pri ustvarjanju. Vse to je kazalo na velik pogum in pripravljenost za raziskovanje neznanega.

Na vrhuncu kariere je skupaj s sodelavci dosegala izjemne uspehe na arhitekturnih in urbanističnih natečajih. Med najpomembnejše projekte sodijo natečajna rešitev za Nove Stanežiče v Ljubljani, Vergerijev trg v Kopru, športno-parkovno naselje v Izoli ter ureditev in razširitev Luke Koper, za kar je leta 2015 prejela nagrado Maksa Fabianija.

Lučkina prirojena radovednost jo je gnala, da se temeljito loti preučevanja vsega od izvora in razvoja do izziva oblikovanja novih kompleksnih organizmov pri stanišč do razvoja urbanih strategij, ki mestom omogoča



preobrazbo v bolj trajnostne, vključujoče in odporne skupnosti. Njena izjemna razgledanost in sposobnost uvida v vzorce prostorskih procesov sta ji omogočili, da je povezovala lokalne značilnosti z globalnimi izzivi. Njene rešitve so bile vedno usmerjene k izboljšanju sobivanja med ljudmi in okoljem, hkrati pa so odražale njeno razumevanje prihodnjih potreb družbe.

Njeno raziskovanje je segalo od specifičnih tem, kot so terasirane kulturne krajine, do širših urbanističnih strategij, usmerjenih v trajnostni razvoj mest. S svojim delom je znala povezovati lokalne značilnosti z globalnimi izzivi, kar so potrjevali njeni mednarodni projekti v okviru programov Obzorje 2020 in Obzorje Evropa ter sodelovanja v interdisciplinarnih raziskavah.

Lučkina ljubezen do raziskovanja teh povezav je presegala običajno radovednost. Terasirane pokrajine, ki jih je raziskovala s posebno strastjo, so ji bile poseben navdih. V teh neizrazitih, pogosto zapostavljenih prostorih je videla priložnost za razkrivanje njihovih skritih zgodb ter njihovega pomena za okolje in družbo. Njeno delo na tem področju ni zgolj osvetljevalo lepote teh krajin, temveč nas je učilo, kako pomembno je ceniti in varovati svet okoli nas, tudi njegove manj opazne dele.

Njena pedagoška in raziskovalna dediščina je tesno povezana tudi z organizacijo in mentorstvom cele vrste domačih ter mednarodnih arhitekturnih in urbanističnih delavnic, objavami mnogih znanstvenih člankov, uredništvom publikacij ter organizacijo mednarodnih konferenc. Posebej velja izpostaviti njen angažma pri mednarodni organizaciji *International Terraced Landscapes Alliance* krajše ITLA in njeno uredniško delo pri znanstveni reviji *The Journal of Terraced Landscapes* ter soavtorstvo monografije o evropskih pristaniških mestih *Port City Atlas* v sodelovanju z TU Delft. Tudi njeno raziskovalno delo je bilo večkrat nagrajeno, tako doma kot v tujini.

Lučka je bila tudi izjemno topla in karizmatična oseba, ki je vedno znala prisluhniti, razumeti in spodbujati vse okoli sebe. S svojo sposobnostjo povezovanja strateškega razmišljanja z umetniškim čutom je v urbanizmu in arhitekturi pustila neizbrisljivo sled tako v ljudeh, ki so jo poznali, kot v projektih, ki so nastali pod njenim vplivom.

Počivaj v miru, draga Lučka. Tvoj duh bo še naprej živel v naših spominih in v naših prihodnjih prizadevanjih.

Tomaž Berčič

**POROČILA
RELAZIONI
REPORTS**

International Conference
MIROSLAV BERTOŠA I NJEGOVI INOVATIVNI
DOPRINOSI U HISTORIOGRAFIJI POVODOM
IZLASKA KNJIGE *TROŠENJE ŽIVOTA*.
Zagreb, University of Zagreb,
18 April 2024

Programme committee: Hrvoje Petrić (chair), Slaven Bertoša, Darko Darovec, Egidio Ivetić, Isao Koshimura, Samanta Paronić, Drago Roksandić, Filip Šimetin Šegvić, Vladimir Šumanović, Vlatka Vukelić

“With this text I do not want to leave my mark on the world from which I emerged due to natural circumstances, but rather to bear witness to the traces that life has left in me,” wrote Miroslav Bertoša (1938–2023) at the beginning of his last work, a very personal review of his life entitled *TROŠENJE ŽIVOTA: Gdje li je život što ga izgubih živeti?* (2024), which he unfortunately did not live to see published. Bertoša died on August 24, 2023.

The fact that he nevertheless left behind rich and profound traces was once again clearly demonstrated by the international conference organized in his honour and memory on April 18, 2024 by the University of Zagreb (Faculty of Croatian Studies; Faculty of Humanities, Department of History and Centre for Comparative Historical and Intercultural Studies; Microhistory workshop and Adriatic/Mediterranean workshop). The central theme of the conference, which was attended by 22 scientists from Croatia, Slovenia, Japan and Austria, was *Miroslav Bertoša i njegovi inovativni doprinosi u historiografiji* (*Miroslav Bertoša and his Innovative Contribution to Historiography*).

In fact, Bertoša was not a historian in the traditional sense. This characteristic was already evident in his doctoral thesis (Zagreb 1981), which he dedicated to the economic and social conditions in the Venetian part of Istria at the time of colonization in the sixteenth and seventeenth centuries. As a descendant of a family from Friuli that had settled in Pazin (Mitterburg, Pisino) in the sixteenth century, Bertoša focussed primarily on the historical study of Istria, especially during the period from the fifteenth to the eighteenth century. He followed the tradition of the French school of *Annales*, which was not orientated towards the history of political, diplomatic and military events, but rather pursued questions of structural history. Accordingly, he was responsible for a new methodology and approach to researching the history of Istria, in which he included economic, social, demographic and cultural-anthropological aspects

and was thus able to paint a previously unknown and multi-layered picture of Istria. The interdisciplinary treatment of historical sources, which he collected in intensive archival studies, also included the critical evaluation and reassessment of the historiographical heritage and opened up new perspectives. It was precisely with his innovative research approach that Bertoša left a lasting mark and influenced new generations of historians both through his numerous works and as a full professor at the universities of Pula and Zagreb, where he enjoyed a high international reputation.

The aim of the conference, which was organized on the initiative of Drago Roksandić, emeritus professor at the University of Zagreb and Bertoša's academic companion, and held at the Faculty of Croatian Studies in Zagreb, was not only to honour Bertoša's work, but also to assess and present his significance as a historiographer in the Croatian and international context. This was prompted not least by the publication of his extraordinary autobiography, which is itself a piece of history.

The conference comprised 6 thematically differentiated sections.

Section 1, chaired by Drago Roksandić, was dedicated to Bertoša as a private person and opened by his son Slaven Bertoša (Juraj Dobrila University of Pula, Faculty of Humanities, Department of History), who spoke from the perspective of a historian and heir about his father's private library, called “knjigograd” (*book castle*), with over 50,000 copies. Stjepan Čosić (University of Zagreb, Faculty of Croatian Studies) drew a picture of Bertoša's personality based on his biographical notes. Zdenka Janeković-Römer (Croatian Academy of Sciences and Arts HAZU, Dubrovnik) posed the question, in analogy to the title of Bertoša's posthumously published autobiography, whether life was really a waste? A question that could not be answered in the affirmative in view of Bertoša's life's work. Samanta Paronić (University of Zagreb, Centre for Comparative Historical and Intercultural Studies) spoke about Bertoša, his passion for books and reading and the culture of reading, which occupied a significant place in his life. Drago Roksandić (University of Zagreb, Centre for Comparative Historical and Intercultural Studies) analysed Bertoša's autobiography in terms of the interweaving and separation of autobiographical and ego-historical elements.

The second section, moderated by Tomislav Galović, focussed on Miroslav Bertoša's academic position as a historiographer. Martino Manin (Croatian Institute of History) contrasted Bertoša's statement about the “rapid aging of works of historical content” with the long resting results obtained from historiographical research. Nevio Šetić (Juraj Dobrila University of Pula, Faculty of Humanities, Department of

History), presented Bertoša as a contemporary Croatian historiographer from Istria and emphasized that he made an important contribution to the formation and understanding of the modern national identity of Istria in the nineteenth century. Filip and Nikola Šimetin Šegvić (University of Zagreb, Faculty of Humanities, Department of History and Centre for Comparative Historical and Intercultural Studies) spoke about Bertoša and his relationship to the tradition of the French School of *Annales*.

The third section, chaired by Samanta Paronić, presented examples of Bertoša's methodology. Isao Koshimura (Tokyo Zokei University) spoke about the scope and legacy of Bertoša's work *Doba nasilja, doba straha*. Suzana Simon (Croatian Academy of Sciences and Arts HAZU, Zagreb) used Bertoša's study *U početku bijahu sir i crvi: Ekscentrična 'kozmogonija' ili 'mentalna revolucija?'* (1990) to recall Miroslav Bertoša as a university professor. Tomislav Galović (University of Zagreb, Faculty of Humanities, Department of History) shed light on the intellectual relationship between von Bertoša and Branko Fučić in a historiographical context, citing Fučić's article written on the occasion of Bertoša's 60th birthday, in which he praised Bertoša's constant "enthusiasm" and "curiosity". Darko Darovec (Institute IRRIS for Research, Development and Strategies of Society, Culture and Environment and University of Maribor, Faculty of Arts, Department of History) then spoke about Bertoša's *Zlikovci i prognanici: Socijalno razbojništvo u Istri u XVII. i XVIII. stoljeću* (1989) and confirmed, based on his own research experience, Bertoša's basic thesis that the governments of the time were indeed responsible for the significant increase in the number of rogues and exiles.

Nikola Šimetin Šegvić moderated the fourth section, which focussed on modern history. Ante Bralić (University of Zadar, Department of History) dealt with the national, linguistic and urbanistic changes in Zadar from 1947 to 1957 and compared them with those in Bertoša's description of the historical development of Pula. Vlatka Vukelić (University of Zagreb, Faculty of Croatian Studies) looked at Pula in the years after the Second World War as a contribution to the personal history of Bertoša, who spent this time in Pula. Hrvoje Petrić (University of Zagreb, Faculty of Humanities, Department of History and Centre for Comparative Historical and Intercultural Studies) spoke about Bertoša and his contribution to the history of ecology, as Bertoša came across related topics early on and was one of the first in Croatia to include them in his historiographical research. Marko Jelenčić (Petra Studenca Primary School, Kanfanar) focussed on Bertoša's work in the field of microhistory and its significance for the history of Istria.

The fifth section, chaired by Vladimir Šumano-
vić, was dedicated to hidden traces or "treasures" and was opened by Filip Novosel (Croatian Institute of History), who reported on Bertoša's activities to collect and publish archival sources on the history of the Eastern Adriatic region in the early modern period. Brigitta Mader (Institute IRRIS for Research, Development and Strategies of Society, Culture and Environment) spoke about social networking and "hidden" information on the cultural history of Istria and Kvarner in the archives of old Austrian research institutions for monument preservation and archaeology (1850–1918). Klara Buršić-Matijašić (Juraj Dobrila University of Pula, Faculty of Humanities, Department of History) offered an archaeological tour of Istria and presented a series of medieval settlements whose foundations rest on prehistoric hill forts.

The sixth and final section of the conference was chaired by Vlatka Vukelić. Andrea Matošević (Juraj Dobrila University of Pula, Faculty of Humanities) reviewed an interview conducted with Miroslav Bertoša in 2013, in which Bertoša spoke about his participation and experiences in the *Omladina* work



campaigns at the end of the 1950s and the beginning of the 1960s. Mirjana Matijević Sokol (University of Zagreb) spoke about Bertoša in his function as a university professor and his view of the history of Istria. The conference concluded with Vladimir Šumanović's (University of Zagreb, Faculty of Croatian Studies, Department of History) memories of "his professor Miroslav Bertoša", whose work, based on new and previously unusual methods, not only opened up a completely new, previously unknown perspective on the history of Istria to generations of students and colleagues, but also to all those interested in historical topics.

A small online brochure entitled *Miroslav Bertoša i njegovi inovativni doprinosi u historiografiji povodom izlaska knjige TROŠENJE ŽIVOTA* was published for the conference, which, in addition to the conference programme, also contains a short biography and a list of all the monographs written by Bertoša (<https://www.iris.eu/wp-content/uploads/Programska-knjizica-skup-posvecen-prof.-Miroslavu-Bertosi.pdf>).

Brigitta Mader

International workshop
POLITICAL NARRATIVES IN PUBLIC DISCOURSE:
THEORY, DETECTION AND IMPACT.
SoMe4Dem, Max Planck Society, Max Planck Institute
for Mathematics in the Sciences, Leipzig,
11–13 November 2024

Workshop programme committee: Jürgen Jost, Eckehard Olbrich, Marjan Horvat, Tom Willaert, Armin Pournaki.

The workshop on narratives in political discourse and social media, held at the Max Planck Institute for Mathematics in the Sciences in Leipzig, Germany, offered an in-depth exploration of how narratives shape beliefs, identities and democratic processes. Over three days, it brought together leading researchers from diverse fields, presenting theoretical insights, computational tools and empirical case studies with real-world applicability.

The workshop began with foundational theories and frameworks for understanding narratives in social and political contexts. Armin Pournaki from the Max Planck Institute for Mathematics in the Sciences provided a comprehensive overview of narratology, emphasising its evolution and relevance to the social sciences. David Tuckett from University College London (UK) and the European University Institute (Italy) critiqued the notion of *Homo Economicus*, commonly found in economics literature, arguing for the importance of studying social and psychological mechanisms intertwined with narratives in guiding

individual and societal actions. Questioning the centrality of rationality in deliberative democracy, André Bächtiger from Universität Stuttgart (Germany) provided the analysis of narratives, particularly storytelling, and explored their role as complementary elements in public and political discourse. Lara Verheyen from Vrije Universiteit Brussels (Belgium) introduced the 'Candide Model,' designed to explore narrative-based language understanding, which investigates how logical reasoning processes embedded in narratives explain differing interpretations of the same linguistic input.

Researchers from the Institute IRRIS for Research, Development and Strategies of Society, Culture and Environment (Slovenia) introduced a framework for analysing political narratives and deliberative quality in the online public sphere. Marjan Horvat presented a theoretical model that combines Greimas' actantial model, deliberative democracy indicators, and insights from Jane Mansbridge to evaluate discourses through input, throughput, and output legitimacy. Jan Babnik and Jure Koražija presented how the model, using NLP techniques to analyse traditional media and X posts, was applied to a case study on Slovenian commemorations of the Day of Resistance.

The event then shifted focus to how narratives shape beliefs, identities and cultural norms. Amy Weissenbach from Columbia University (US) investigated the causal reasons or sequences leading to poverty through the analysis of more than 10,000 letters sent to Warren Buffett. Using network graphs to represent narrative sequences, she identified typical pathways to precarity linked to different themes in the letters. Carlo Romano Marcello Alessandro Santiagiustina from Sciences Po Médialab (France) complemented this perspective by exploring how followers of Members of Parliament in eight EU countries express socio-political identities through social media bios. By using Structural Topic Modeling (STM) and attitudinal embeddings, he examined ideological and national variations in self-representation, uncovering how European citizens construct and communicate group identities in the EU public sphere.

Moving into the dynamics of political and public discourse, Tom Willaert and Armin Pournaki presented a graph-based approach for extracting narrative signals from text using Abstract Meaning Representation (AMR). Their case study of EU political addresses demonstrated how this method uncovers underlying political narratives in public discourse. Marc Tuters from the University of Amsterdam (The Netherlands) analysed Russian state-sponsored propaganda, highlighting the deliberate dissemination of pro-Russian narratives and anti-Western conspiracy theories, such as the

‘Golden Billion.’ His study revealed how Russian embassies’ social media pages strategically spread propaganda to legitimise the invasion of Ukraine. Similarly, Marc Keuschnigg from Leipzig University (Germany) examined how concepts related to immigration were framed in Swedish newspaper articles over time, identifying key turning points such as the shift from multicultural ideals to restrictive immigration policies.

The workshop also emphasised advanced computational methods for analysing and modelling narratives. Joshua Introne from Syracuse University (US) presented findings from a large-scale online study examining the diffusion of narrative information. Using an experimental framework involving a collaborative multiplayer game where participants reconstructed narratives, he demonstrated that individuals actively seek narrative coherence and that social pressure influences narrative adoption patterns. Felix Victor Münch from the Leibniz-Institut für Medienforschung and Hans-Bredow-Institut (Germany) developed a method combining BERTopic-inspired embedding-clustering, semantic similarity networks and hierarchical community detection to analyse public

discourse, with a case study on climate discourse on social media. Veronika Batzdorfer and Sven Banisch from the Karlsruhe Institute of Technology (Germany) explored habitual online engagement through a computational model analysing conspiracy theories on Voat, revealing the role of social feedback and reinforcement learning in shaping user behaviour. Finally, Lisa Oswald and Philipp Lorenz-Spreen from the Max Planck Institute for Human Development (Germany) explored user motivations for sharing content on Reddit and Twitter, linking motives to narrative themes.

The workshop on narratives in political discourse and social media successfully bridged theoretical insights, computational advancements and empirical research. The event underscored the multifaceted role of narratives in shaping beliefs, public discourse, and democratic processes. The diverse approaches and case studies presented not only highlighted the current state of narrative research but also paved the way for future interdisciplinary collaborations.

Marjan Horvat & Jure Koražija

KAZALO K SLIKAM NA OVITKU

SLIKA NA NASLOVNICI: *Padre Cruz v Lizboni je območje kontrastov, zaznamovano z izjemno družbeno in kulturno raznolikostjo, ki se odraža v pestrosti urbanih prostorih* (Grafika: Marta Fiolić).

Slika 1: *Urbani festival Budapest100, ki slavi stoletne zgradbe in dediščino skupnosti, Budimpešta (2011)* (Foto: Hungarian Contemporary Architecture Centre).

Slika 2: *Prizor različnih dogodkov med urbanim festivalom Budapest100, Budimpešta (2011)* (Foto: Hungarian Contemporary Architecture Centre).

Slika 3: *Origami letala - leteče želje. Dogodek ustvarjanja prostorov v degradirani mestni niveleblagovnici, Nikozija (2021)* (Foto in grafika: Nafsika Hadjichristou).

Slika 4: *Mislec v Kraterju. Akcija ustvarjanja prostorov Re-Place, Ljubljana (2022)* (Foto: Špela Verovšek).

Slika 5: *Vrtnarska iniciativa skupnosti KÉK, Budimpešta (2010)* (Foto: Hungarian Contemporary Architecture Centre).

Slika 6: *Kreativna akcija ustvarjanja prostora v Lizboni (2021), vabilo* (Grafika: Marta Fiolić).

Slika 7: *Zvočni prostor: mladinska akcija ustvarjanja prostorov, Lizbona (2022)* (Foto: Marta Fiolić; Grafika: Špela Verovšek).

Slika 8: *Akcija ustvarjanja prostorov Re-Place v Kraterju, Ljubljana (2022)* (Foto: Žiga Gorišek; Grafika: Špela Verovšek).

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FRONT COVER: *The Padre Cruz neighbourhood in Lisbon is a territory of contrasts marked by an enormous socio-cultural and human diversity reflected in urban places* (Graphic: Marta Fiolić).

Figure 1: *The Budapest100 urban festival celebrating centenarian buildings and community heritage, Budapest (2011)* (Photo: Hungarian Contemporary Architecture Centre).

Figure 2: *Scene from diverse community events during the Budapest100 urban festival, Budapest (2011)* (Photo: Hungarian Contemporary Architecture Centre).

Figure 3: *Origami planes - flying wishes. Placemaking event in degraded city department store, Nicosia (2021)* (Photo and graphic: Nafsika Hadjichristou).

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